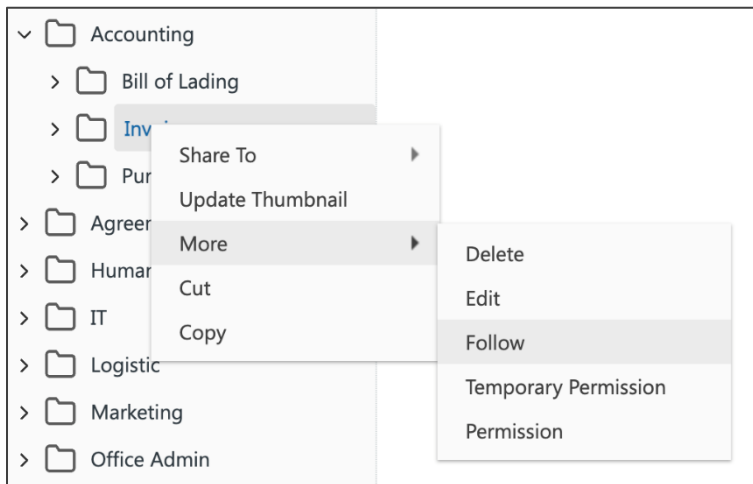


G. Follow

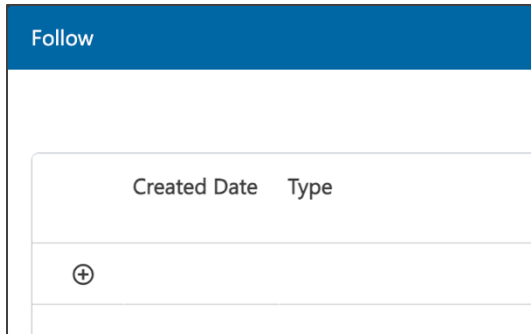
Follow is a feature which allows you to “monitor” a folder for new incoming documents and send alerts to users, trigger any workflows or AI Capture Service.

I. Create New Follow

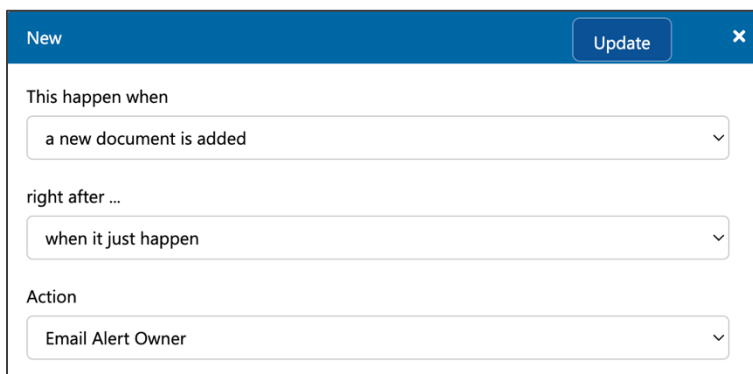
1. To create a new Follow, select a folder, right click to bring out the context menu. Select More > Follow.



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



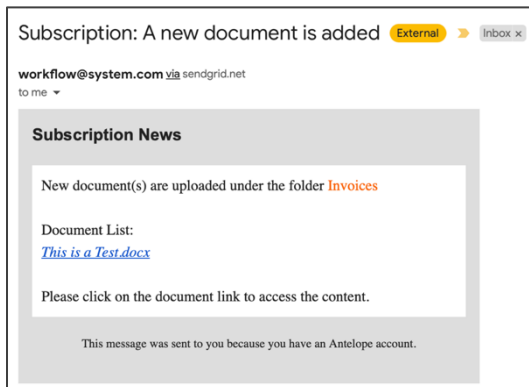
3. Select the following options. This will send email to the document owner when a new document is added to the folder. Click “Update” button to save.



4. A new Follow rule is added.

Follow				
Created Date	Type	Advance Setting	Template	Members
2024-08-27	a new document is added		Email Alert Owner	Antelope

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



II. Follow Events

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

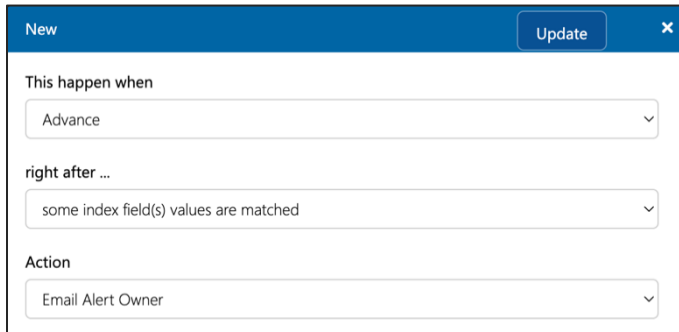
This Happens When...	
Options	Description
A new document is added	When a new document is added to the folder.
A document is updated	When a document is updated with newer version, or the document index is updated.
A document is commented	When user comment on a document.
Advanced	Works with below option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

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

Action	
Options	Description
Add to Group List	Add to “Notification” webpart. You are required to select which user group(s) to notify.
Add to My List	Add to “Notification” webpart.
Add to User List	Add to “Notification” webpart. You are required to select which user account(s) to notify.
Email Alert Group	Send email notification to recipient(s). You are required to select which user group(s) to notify.
Email Alert Owner	Send email notification to document owner.
Email Alert User	Send email notification to recipient(s). You are required to select which user account(s) to notify.
Start Workflow – 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.

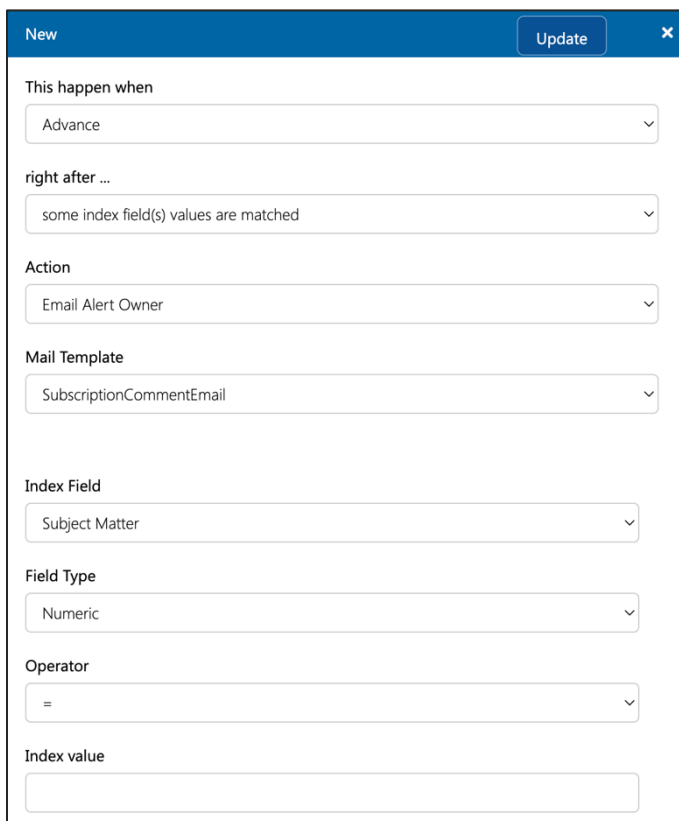
III. Tigger by Index Field

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”.



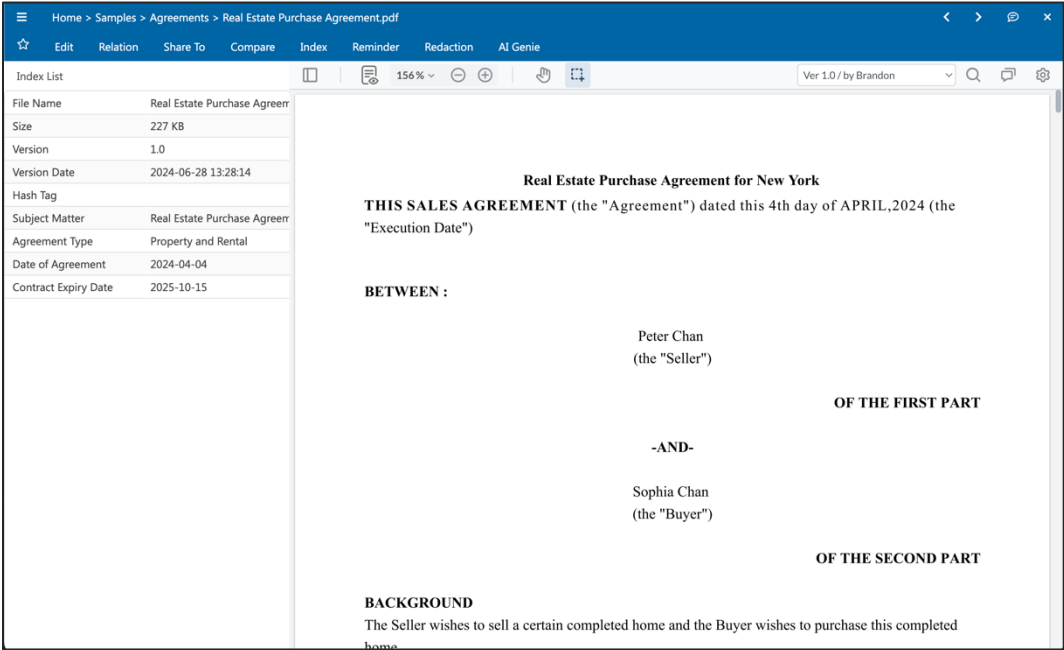
The screenshot shows a 'New' configuration window with a blue header bar containing 'New', 'Update', and a close button. The main content area has three sections: 'This happen when' with a dropdown menu showing 'Advance'; 'right after ...' with a dropdown menu showing 'some index field(s) values are matched'; and 'Action' with a dropdown menu showing 'Email Alert Owner'.

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



The screenshot shows the same 'New' configuration window as before, but with additional fields visible below the 'Action' section. These include: 'Mail Template' with a dropdown menu showing 'SubscriptionCommentEmail'; 'Index Field' with a dropdown menu showing 'Subject Matter'; 'Field Type' with a dropdown menu showing 'Numeric'; 'Operator' with a dropdown menu showing '='; and 'Index value' with an empty text input field.

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



Index Field

Contract Expiry Date

Field Type

Datetime

Operator

=

Index value

Now() - 30D