SM24-01-Poffices AIO² Server

Web Portal User Manual

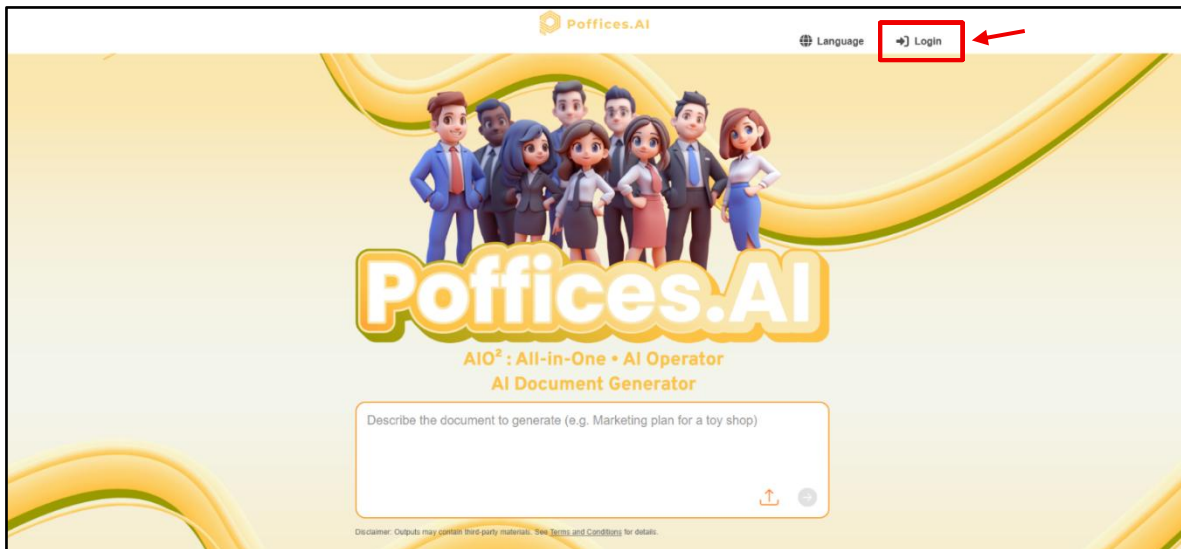November 2025

HK R&D

CONTENT

1. Introduction

The Poffices.AI Web Portal is the main interface for Poffices AIO² Server users to create and manage their AI-generated documents. Through this portal, users can submit requests to generate documents, view their history records, access the dashboard, and manage their account information.
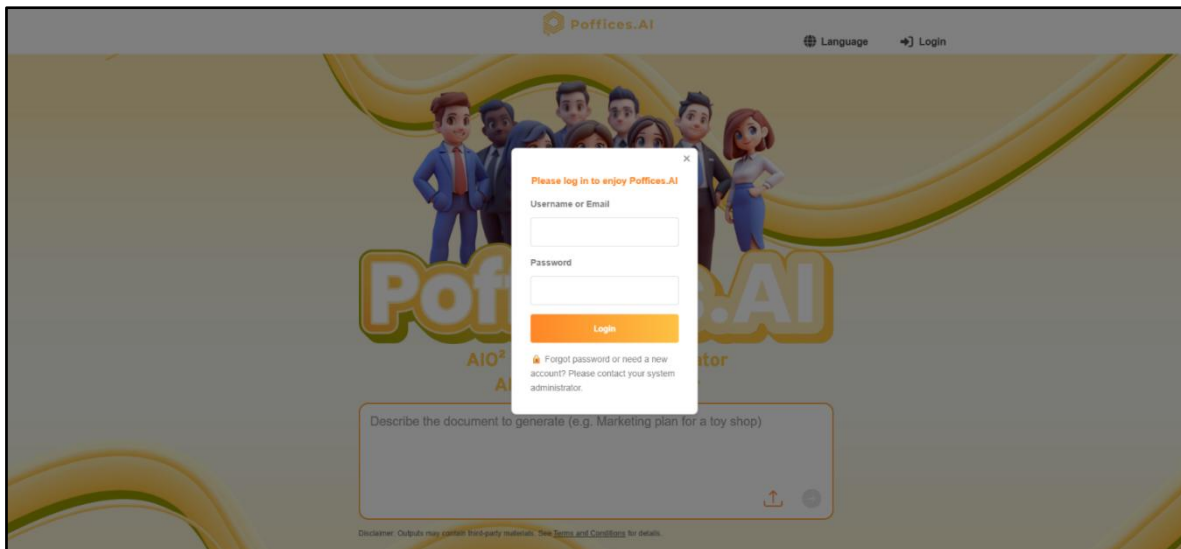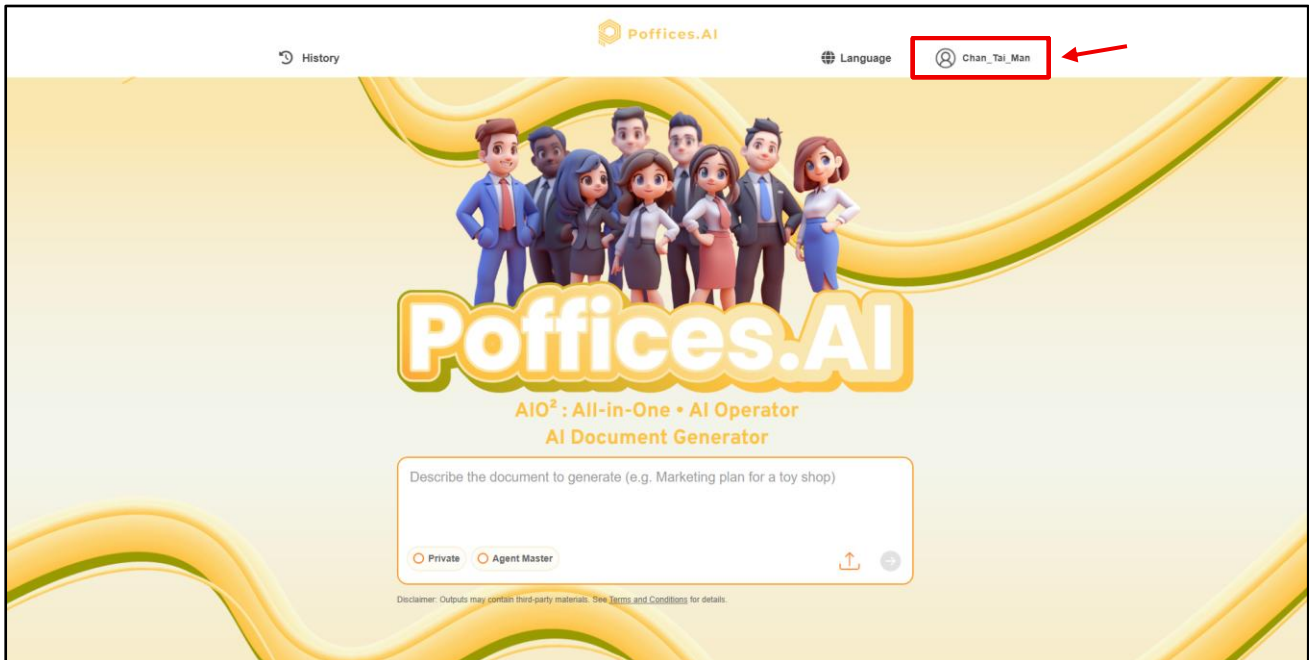
2. Login and Logout

2.1. Login

- Open the Web Portal using the URL provided by your system administrator.
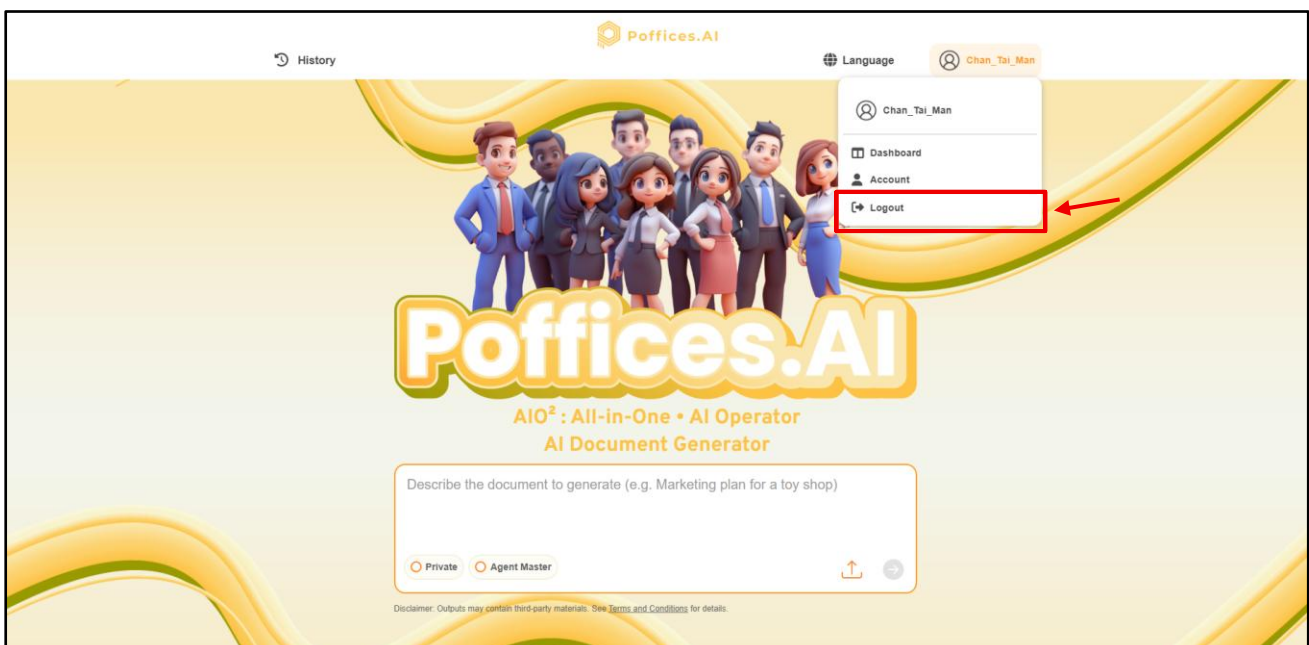- Click Login at the top-right corner of the page.

- In the login window, Enter your Username/Email and Password.
- Click Login to access the portal.
- If you forget your password or need a new account, use the link provided and contact your system administrator for assistance
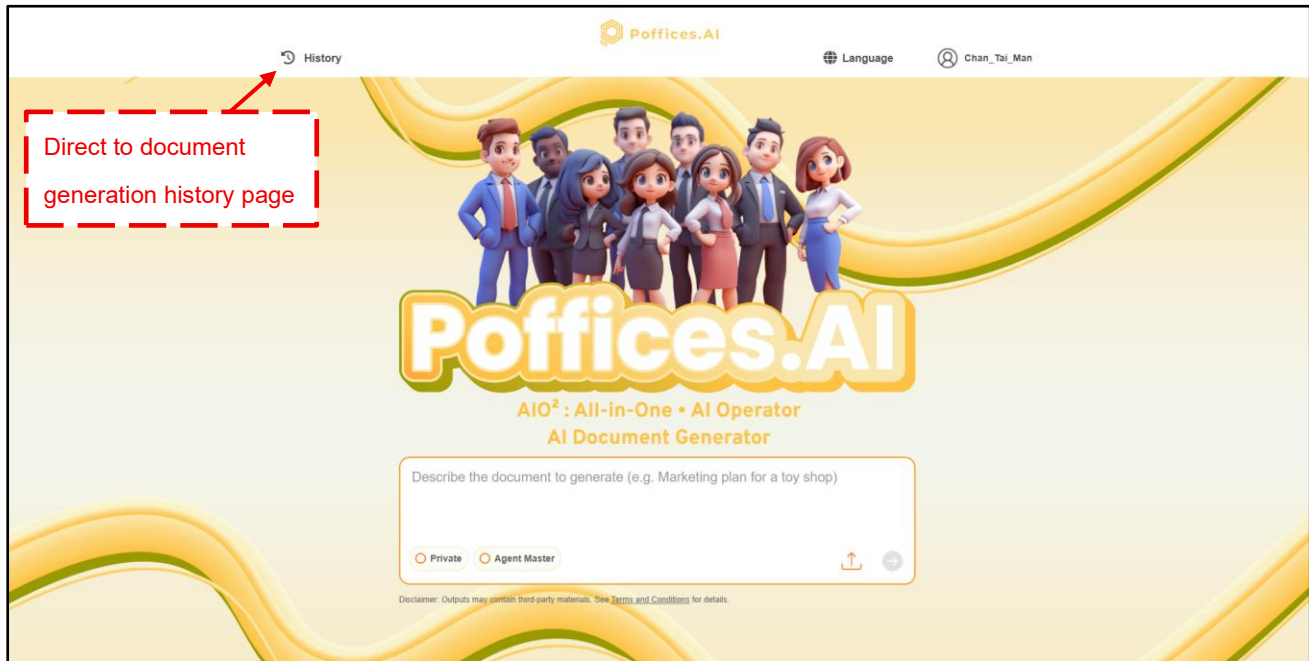
- Once logged in successfully, the username will appear in the top right corner of the home page

2.2. Logout

- Click your username at the top-right corner of the page.
- In the dropdown menu, select Logout.
- You will be redirected back to the Home Page or Login Page.

3. Home Page Overview

- After logging in, you will see the Web Portal Home Page — the main interface for creating documents.
- The Home Page provides access to key features including request submission, history list, language selection, and user account controls.
- The Home Page includes the following elements and functions:
  - Language – Switch between available display languages.
  - User Menu – Access your Dashboard, Account Page, and Logout options.
  - Request Input Box – Enter the document description or instructions you want the system to generate.
  - (Beta Version) File Upload Button – Upload a supporting file (e.g. PDF, DOCX, TXT) to assist with document generation.
  - Submit Button – Click to send your request to the AI document generator.
  - Private – When selected, the system will not save the request or the generated document in your history. (Useful for sensitive or temporary requests.)
  - Agent Master – Allows you to select one or multiple AI agents to complete the task.
    - Single Agent: Generate a document using one selected agent.
    - Multiple Agents: Multiple agents will complete their respective parts, and the system will combine all outputs into one consolidated document.
  - History – View your previously submitted requests and generated documents.

3.1.   User Menu
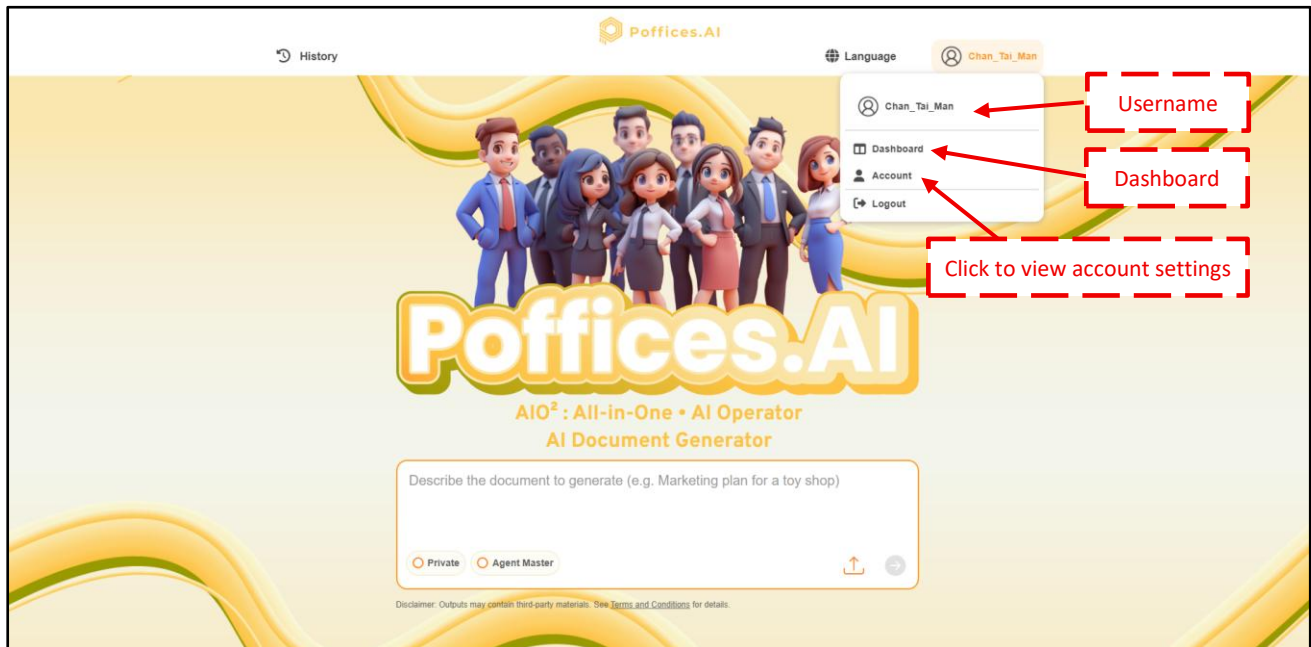
- Click your username at the top-right corner of the page to open the User Menu.
- The User Menu provides quick access to:
  - Dashboard – Opens your personal dashboard showing usage trends and recent activity.
  - Account – Opens your account settings where you can update personal information and change your password.
 - Logout – Logs you out of the Web Portal.

4. Language Selection
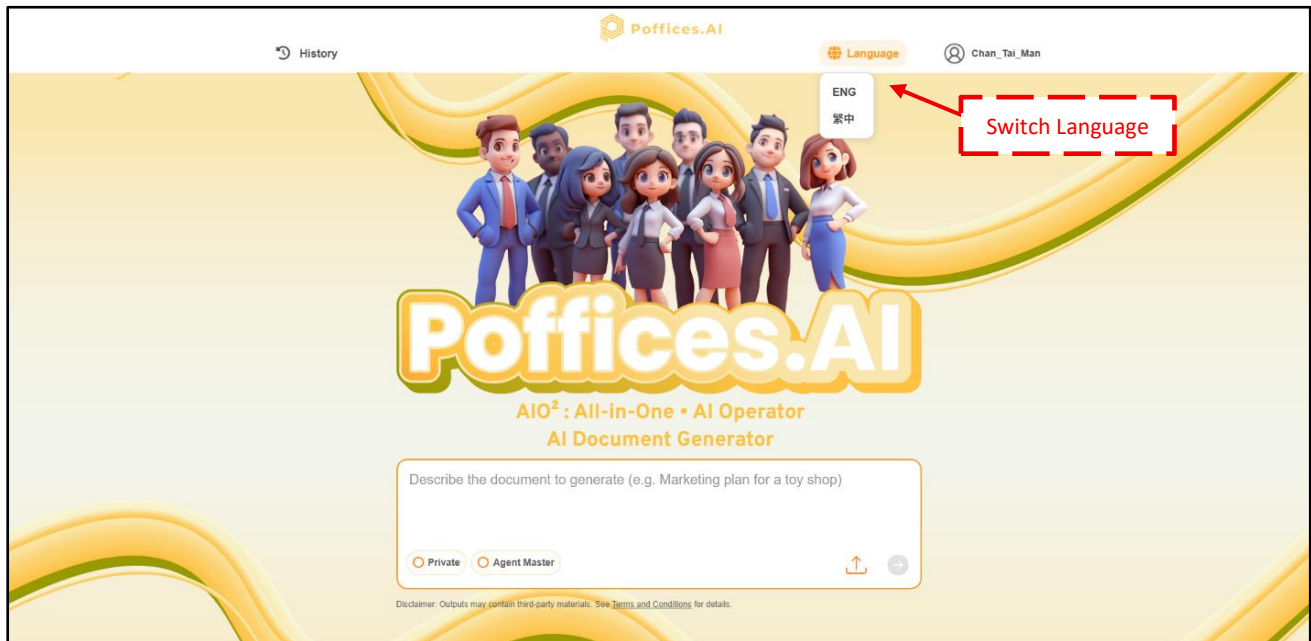
- You can change the display language at any time by clicking Language at the top right corner of the page.
- A dropdown menu will appear with the available options (e.g., ENG, 繁中).
- Click your preferred language to switch the interface.
- The selected language will be applied instantly across the entire Web Portal.

- **Important**
  - The system's output language follows the display language, not the language used in your request. (Example: If display language is set to ENG, the document will be generated in English even if your request is written in Chinese.)

5. Generate Document

This section explains the complete workflow for generating a document using the Poffices.AI Web Portal — from entering your request to viewing the result.

5.1. Enter Your Request
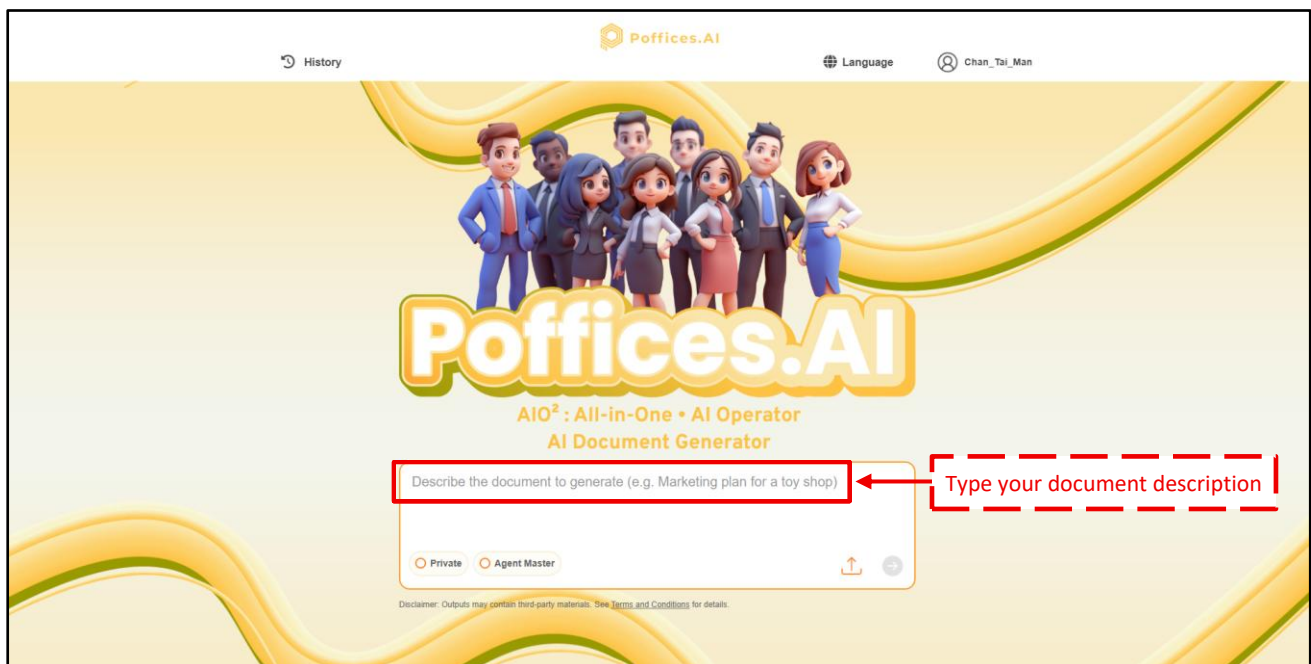
- On the Home Page, type your document description or instructions into the Request Input Box. (Example: Marketing Plan for Toy Store.)
- The system will use this request as the main instruction for generating your document.
- Your request does not need to include phrases such as *"please help me to…"* or *"please generate…"*. Simply state the document you want, and the system will understand and proceed.

5.2. Select Private or Agent Master (Optional)
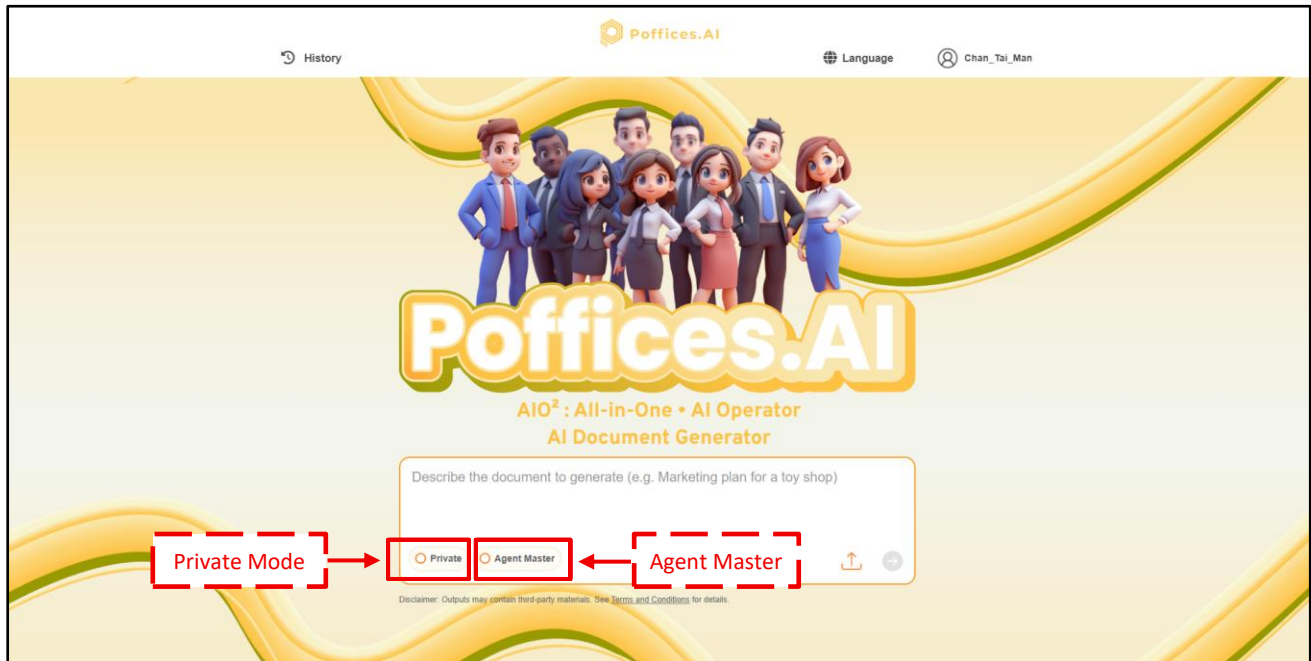
- Private Mode
    - o When selected, the system will not save your request nor the generated document in History.
    - o Suitable for confidential or temporary work.
- Agent Master
    - o Allows you to choose one or multiple agents.
    - o Single Agent: Generate the document using one selected agent.
    - o Multiple Agents (Up to 6 agents): Each agent generates a section, and the system will combine all outputs into one complete document.

5.3.   (Beta Version) Upload an Attachment

Upload Attachment
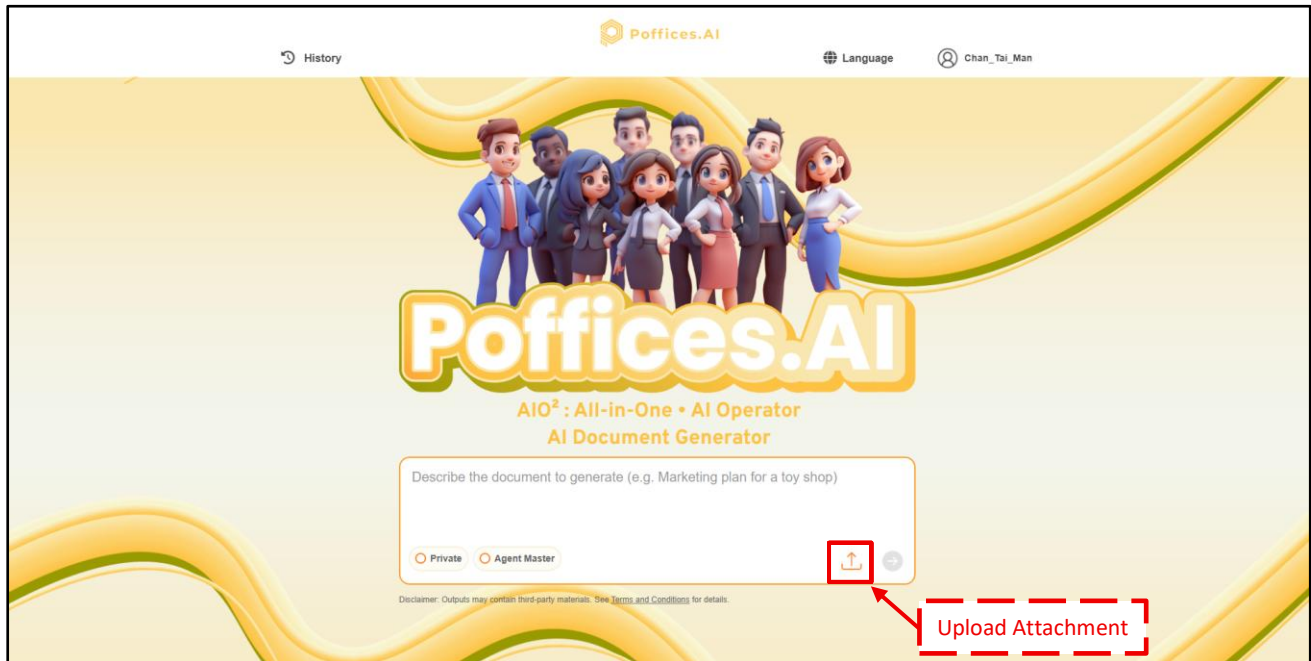
- Click the Upload icon to attach a supporting file for your request.
- The system will analyse the file and extract the most relevant information to assist with document generation.
- Supported file formats include DOCX, PDF, CSV, and TXT, up to 10 MB in size.
- The system reads the file within a fixed time limit.
- If the file cannot be fully processed within the time limit, generation will proceed using the portion that has been successfully read.
- Reading speed may vary depending on: Text density, Page layout, Scanned or image-based documents

5.4. Submit the Request
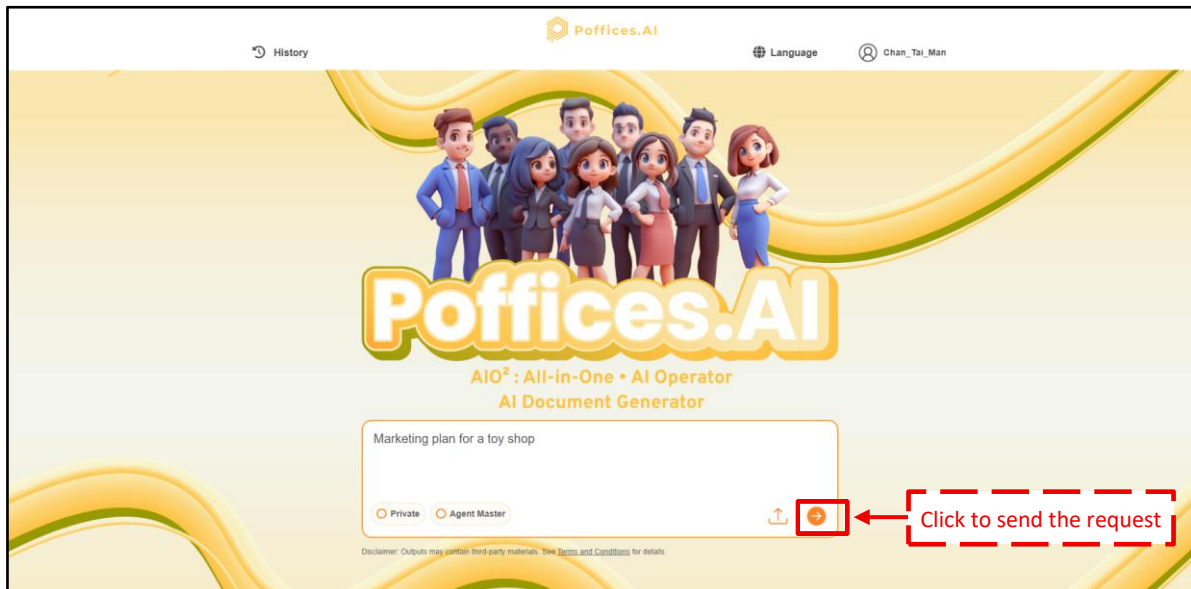
- Click the Submit button to start the generation process.
- The system will immediately begin preparing your request.
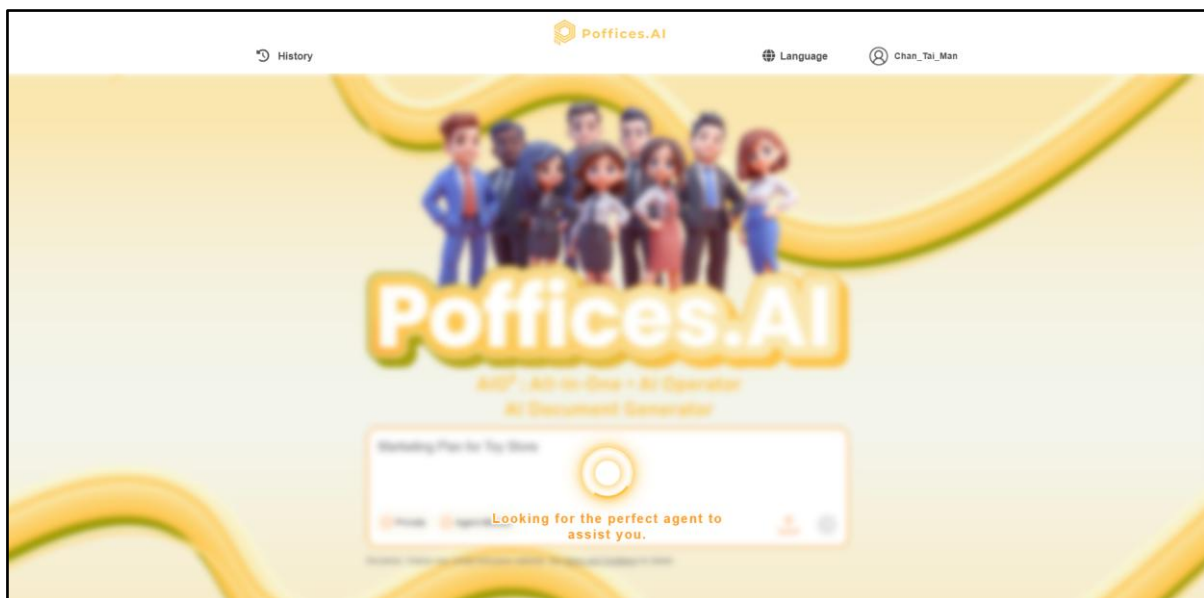
- After submitting, the screen will blur and display a loading animation.

5.5. Document Generation Page
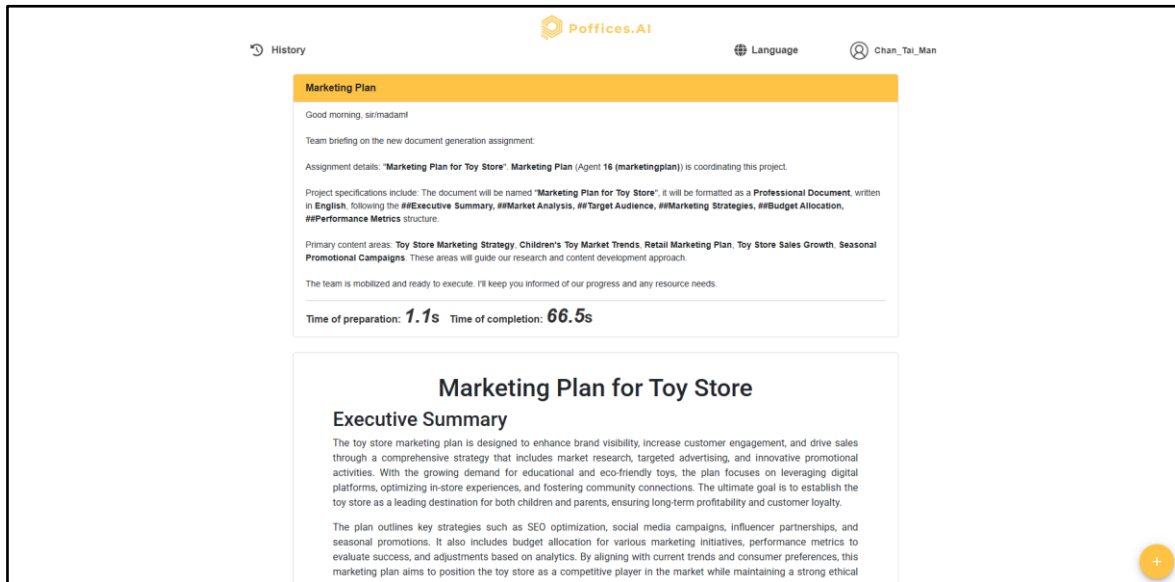
- After the initial loading screen, the system will redirect you to the Document Generation Page.
- At this stage, the document may still be processing, and the content may not appear immediately.
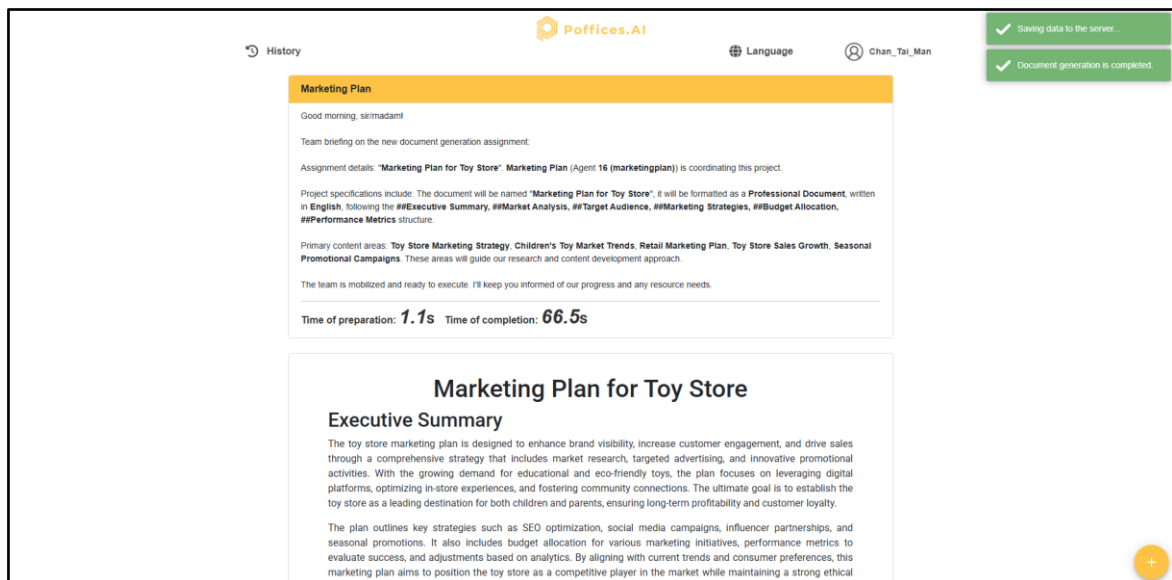
- When the document is fully generated, the system will display completion messages at the top-right corner of the page.
- Once completed, the full generated document will be visible in the preview area. You can scroll through the entire content to review the result.

5.6. Document Actions (Edit, Download, Share)
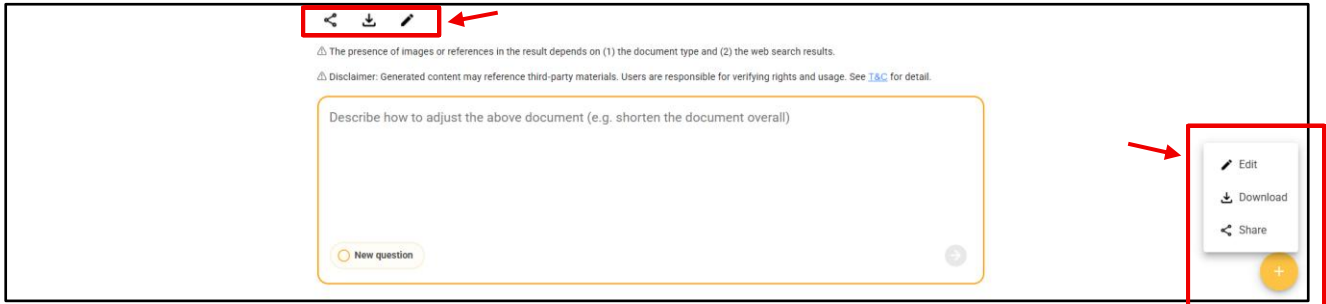
- These actions (Edit, Download, Share) are available both below the generated document and in the floating "+" button at the bottom-right corner of the page.
- Edit – Opens the editor allowing you to modify the generated content directly.
- Download – Allows you to download the generated document in Word (DOCX) and PowerPoint (PPTX).
- Share – Provides sharing options depending on your system setup.
  - o WhatsApp – Send the document link directly via WhatsApp.
  - o Copy Link – Copies a shareable link to your clipboard.

5.7. PPTX Template Selection
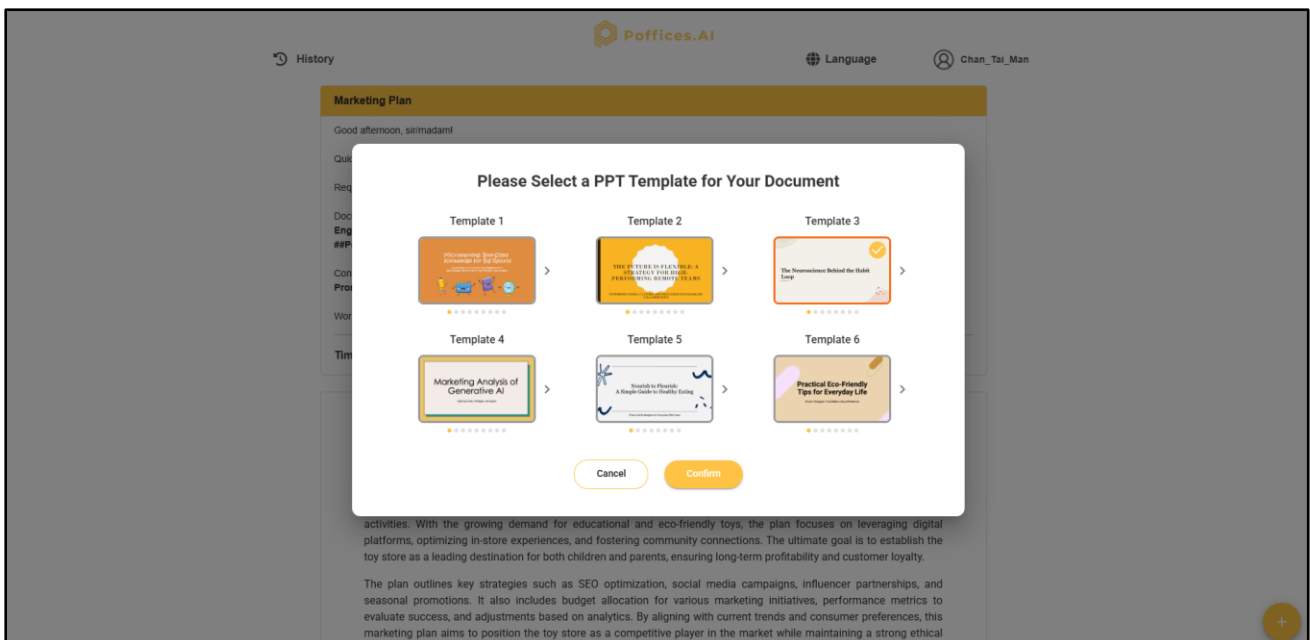
- When selecting PPTX, a template selection pop-up will appear.
- Choose a preferred template and click Confirm to generate the PPT file.

5.8.   (Beta Version) Follow-up Questions

Describe how to adjust the above document (e.g. shorten the document overall)

○ New question

Describe the document to generate (e.g. Marketing plan for a toy shop)
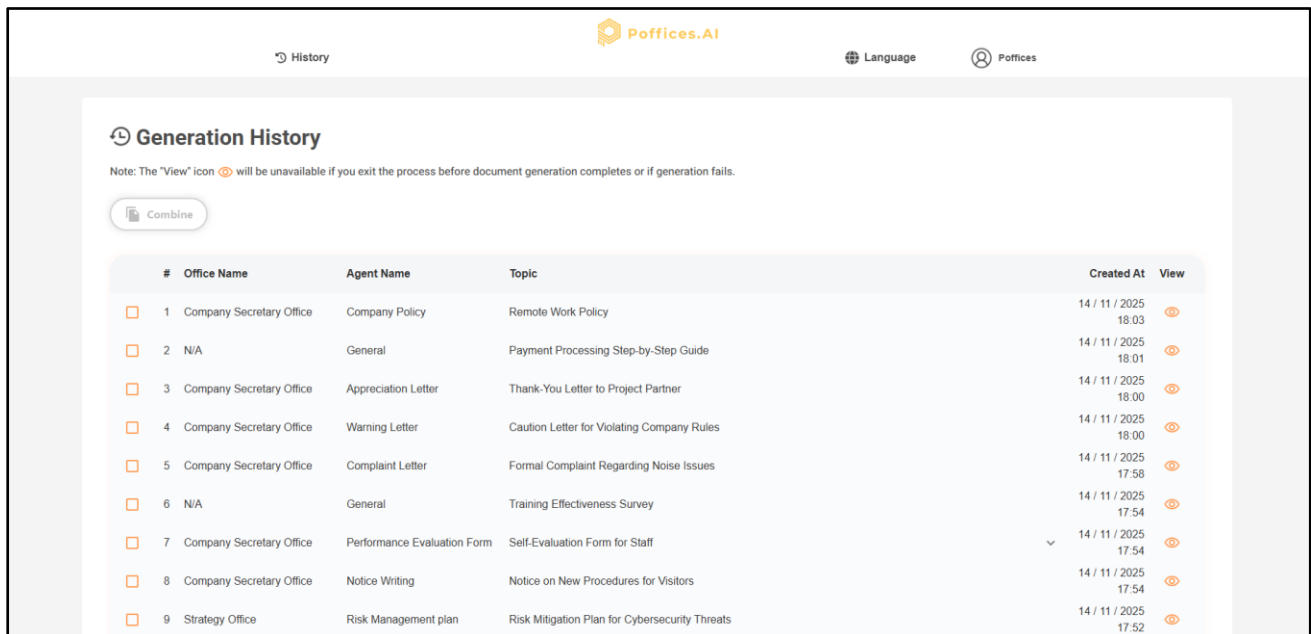
✓ New question   ○ Private   ○ Agent Manager

- You can continue refining the generated document using the Follow-up Question box.
- New question
    o Select New question when you want to ask a brand-new request that is not related to the current document.
    o Example: After generating a Marketing Plan, you may click New question and type a new request such as "Create an HR Policy".
    o This will create a separate new document, which will appear in your History list as a new entry.
- Not selecting "New question"
    o If you do not select New question, the system will treat your input as a follow-up instruction to refine or adjust the existing document.
    o Example: "Shorten the document overall" .
    o The system will generate an updated version of the same document, recorded as a Follow-Up Question under the original entry in History.
- The system will create the appropriate output based on whether you selected New question or not.

6. History Page

The History Page displays all previously generated documents and follow-up questions created under your account. This page allows you to review, reopen, and manage your past document generations.

6.1.   Page Overview
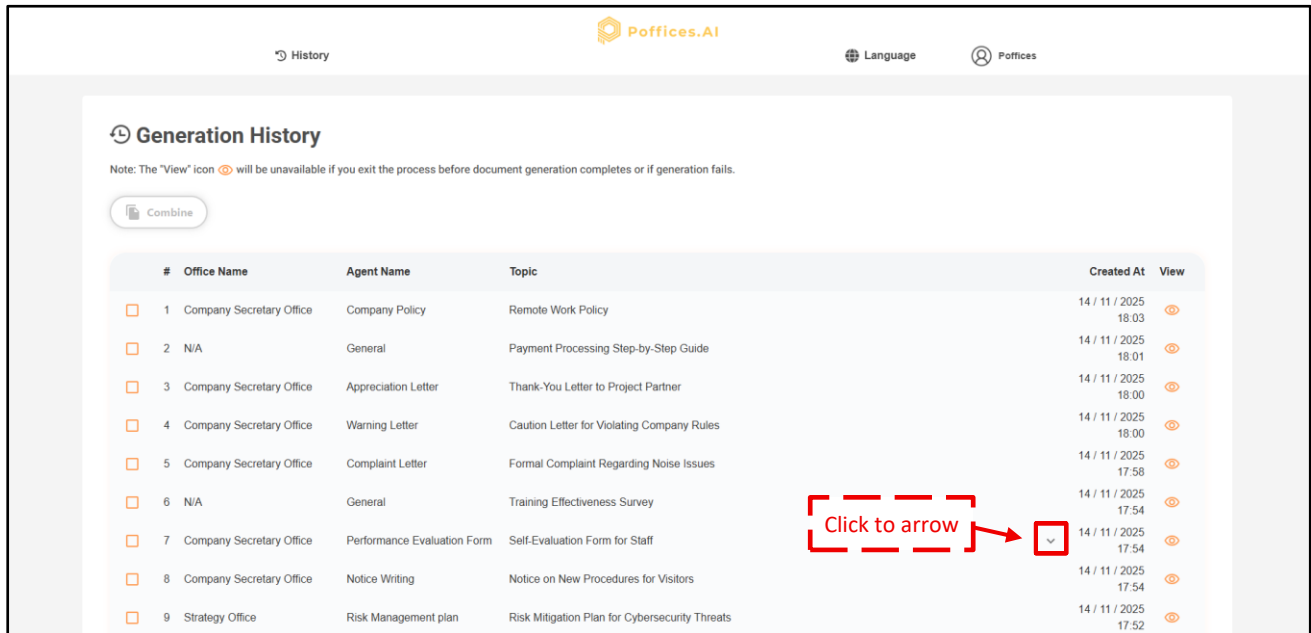
- The History Page lists all your generated documents.
- If a document contains follow-up questions, an arrow icon will appear next to the record.
- Click the View (eye) icon to reopen the generated document.
- You will be redirected to the Document Generation Page showing the full result.

- Note
  o   The View icon will be unavailable if you exit before generation completes or if generation fails.
  o   Documents generated in Private Mode are not stored in the History Page.

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6.2. Viewing Follow-Up Questions

- When a document has follow-up questions, an arrow icon appears beside the entry.
- Click the arrow to expand the row.
- The Follow Up Questions section will appear below the main entry.

6.3.   Combine Documents

- Select multiple entries using the checkboxes on the left.
- Click Combine to merge selected documents into a single output.
- You can adjust the order of the selected documents using the dropdown numbers shown in the pop-up window.
- A new combined document will be generated using the selected records.

7. Dashboard

The Dashboard provides an overview of your document generation activity, including usage trends, office and agent performance, and a list of recent activities. This page helps you understand how the system is being used and track your document generation patterns.
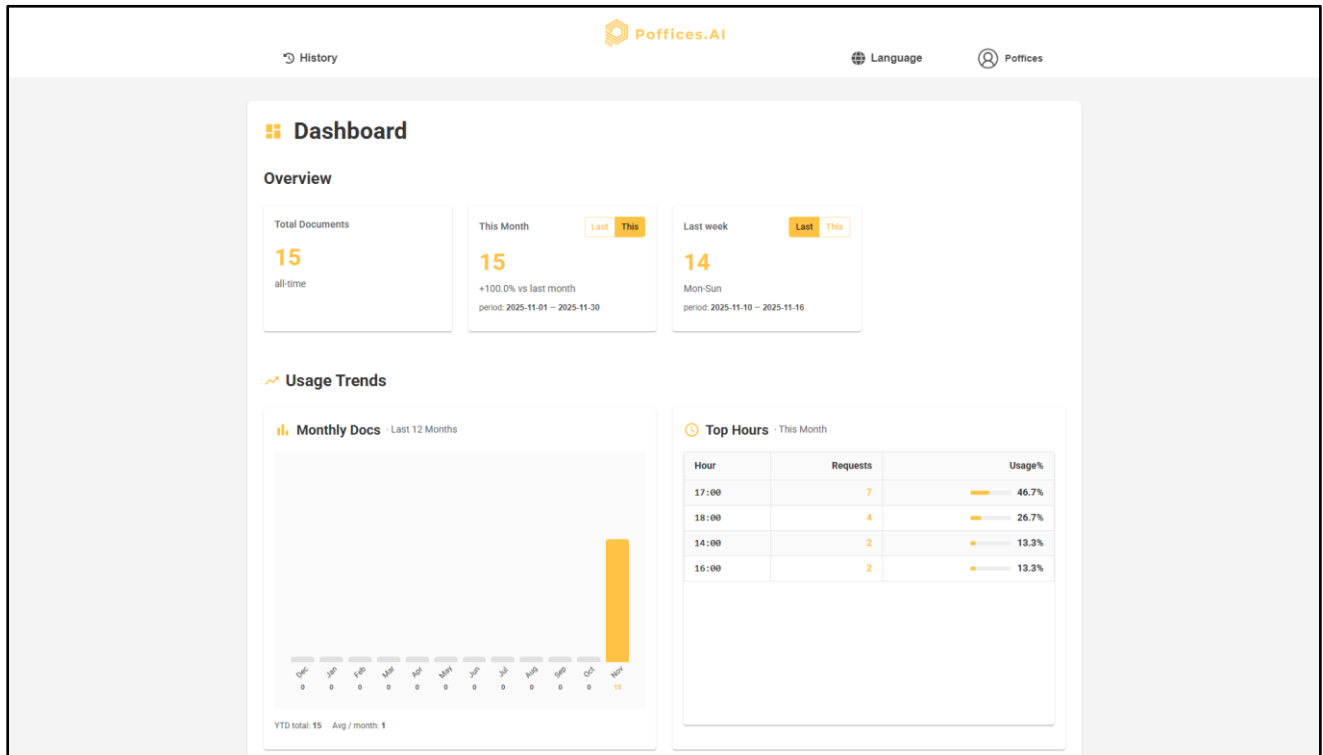
7.1. Accessing the Dashboard

● Click your username at the top-right corner of the page.

● From the dropdown menu, select Dashboard.

● You will be redirected to the Dashboard page.

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7.2.   Overview Section
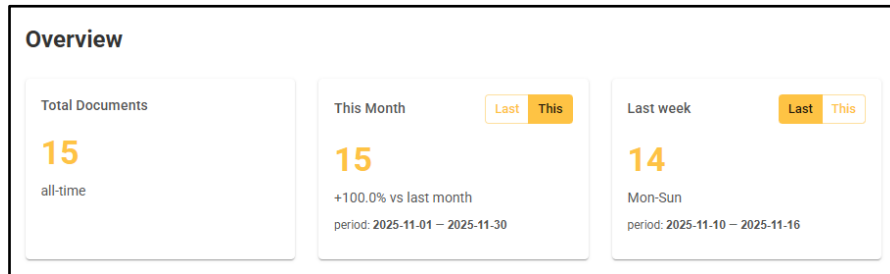
- The top section of the Dashboard summarises your generation activity:
  - o Total Documents: Displays the total number of documents generated in your account (all-time).
  - o This Month: Shows the number of documents generated this month and the percentage change compared with last month.
  - o Last Week: Shows the number of documents generated in the previous week.

7.3.   Usage Trends
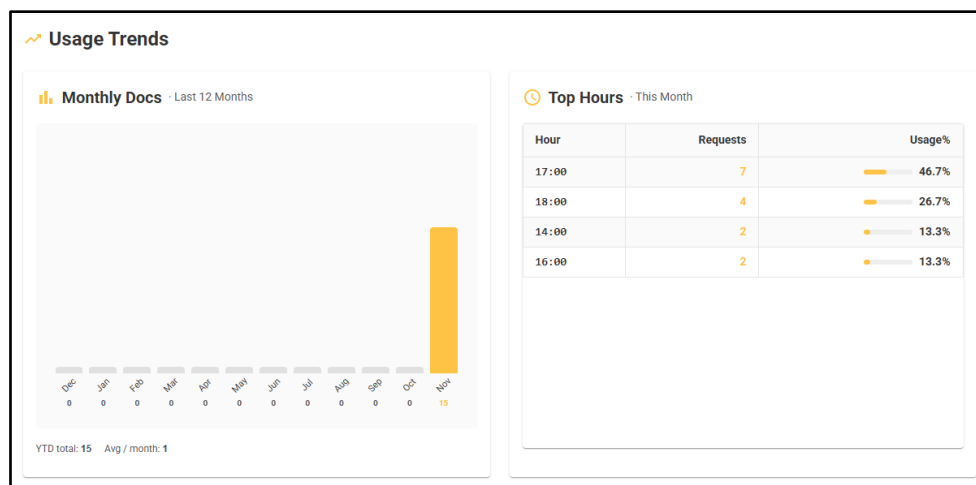
- Monthly Docs (Last 12 Months)
  - o A bar chart showing the number of documents generated each month.
  - o Helps you monitor long-term document usage trends.
- Top Hours (This Month)
  - o Displays which hours of the day have the highest document generation activity.
  - o Each hour shows: Number of requests, Percentage usage rate.

7.4. Top Offices and Agents (Numeric Ranking)

🏆 **Top Offices and Agents** (Numeric Ranking)

#	Agent Name	Office	Doc Count	Usage%
🏆 1	General	System	2	13%
🏆 2	Job Application Letter	Personal Assistant Office	2	13%
🏆 3	Activity Idea	Personal Assistant Office	1	7%
4	Appreciation Letter	Company Secretary Office	1	7%
5	Company Policy	Company Secretary Office	1	7%
6	Complaint Letter	Company Secretary Office	1	7%
7	Event Planner	Sales & Marketing Office	1	7%
8	Follow-up-query	System	1	7%
9	Notice Writing	Company Secretary Office	1	7%

Total: 15 docs • Used 13 agents

- This table lists the offices and agents you used the most.
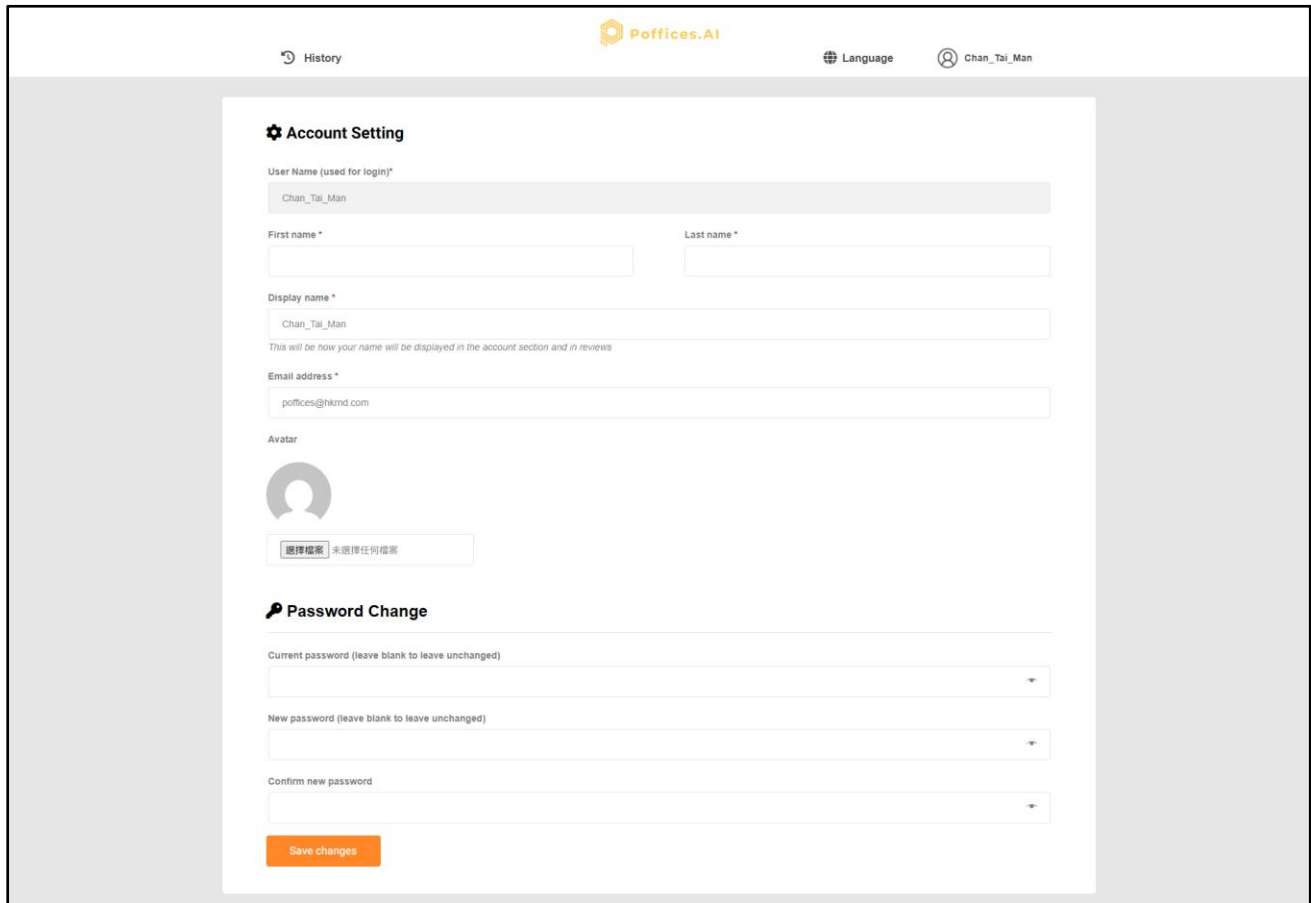
7.5. Recent Activity section

🕐 **Recent Activity**   View All History

Time	Topic	View
2025/11/14 下午6:03:48	Write a remote work policy for employees.	👁
2025/11/14 下午6:01:30	Create a step-by-step guide for processing payments.	👁
2025/11/14 下午6:00:59	Prepare a thank-you letter to a project partner.	👁
2025/11/14 下午6:00:37	Write a caution letter for violating company rules.	👁
2025/11/14 下午5:58:10	Prepare a formal complaint to a landlord about noise.	👁
2025/11/14 下午5:54:40	Create a survey for training effectiveness	👁
2025/11/14 下午5:54:29	Draft a self-evaluation form for staff.	👁
2025/11/14 下午5:54:13	Create a notice informing visitors about new procedures.	👁

- The Recent Activity section displays your latest document generations.

8. Account Page

The Account Page allows you to view and update your personal information. This page contains your basic profile details and settings related to your account.

- Access the Account Page by clicking your username at the top-right corner and selecting "Account".
- The page displays your basic account information.
- To update your password, you can enter the required information and click "Save changes" to confirm.

9. Official Cloud Pages
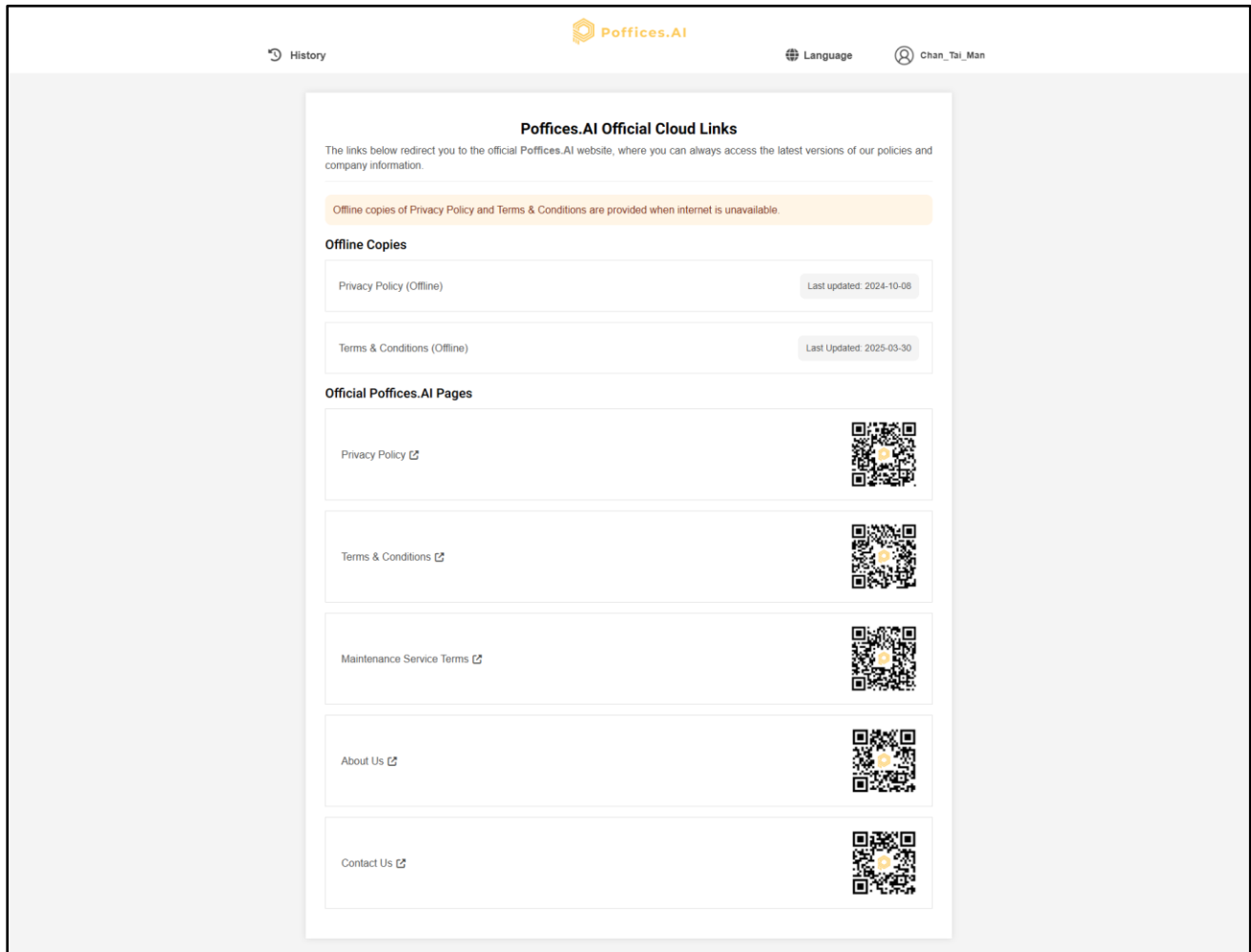
- The Official Cloud Pages link is in the footer of the web portal.

- This page provides access to the official cloud-based versions of Terms and Conditions, Privacy Policy and Other legal or reference documents managed by Poffices.AI.

- These pages are hosted on the cloud to ensure:
  - o You always view the latest and most updated policies.
  - o Consistent and accurate information across all users.

- Clicking the link will redirect you to the official cloud documents in a new browser tab.

- Users should refer to these cloud pages for:
  - o Understanding system terms of use
  - o Reviewing privacy-related information
  - o Ensuring compliance with the platform's policies

Contact information

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