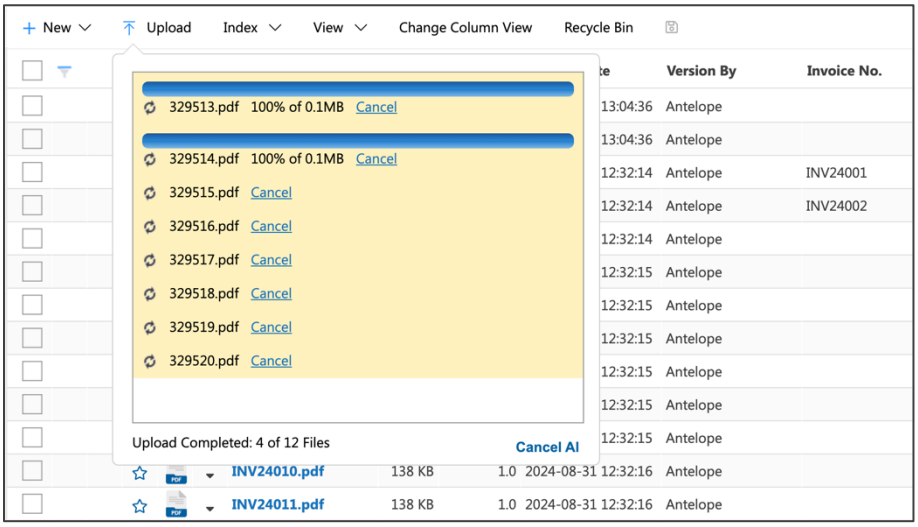
N. Document

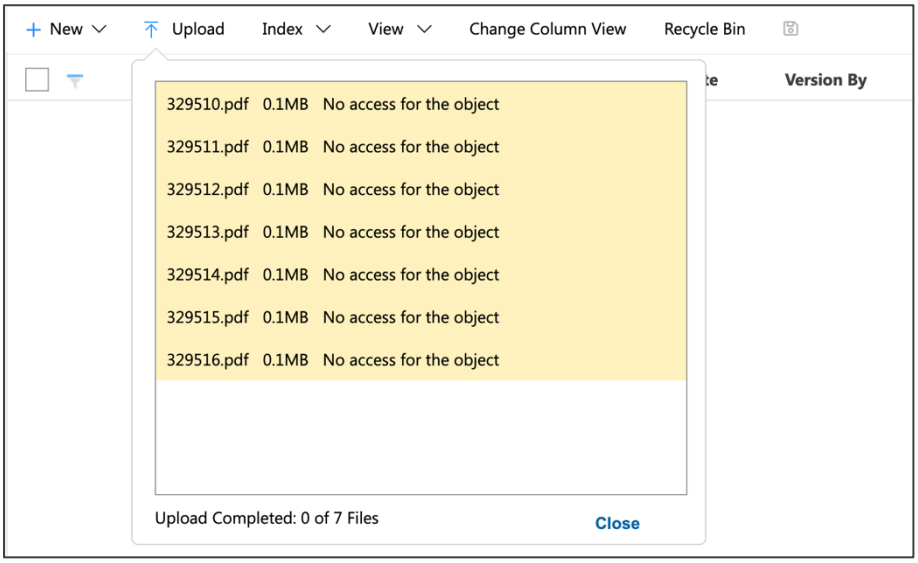
I. Upload Document

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



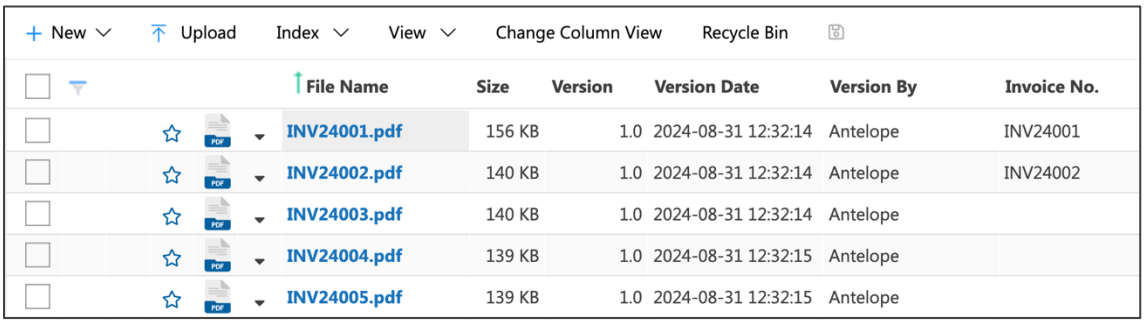
2. The upper limit of upload size per document is 2.0GB.

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

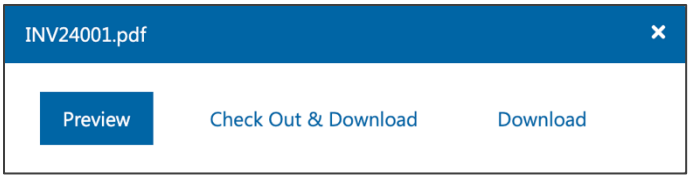


II. Preview Document

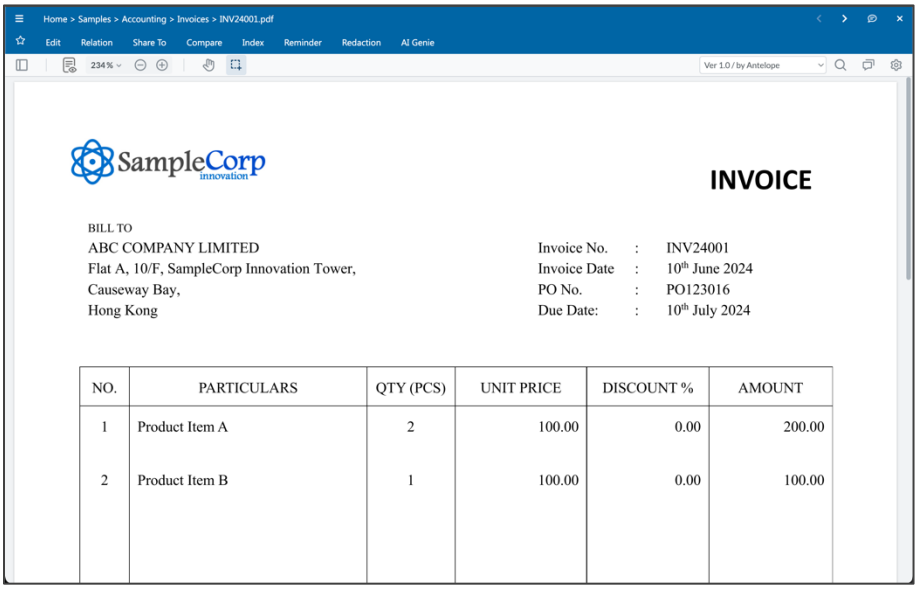
1. To preview a document, click the document name.



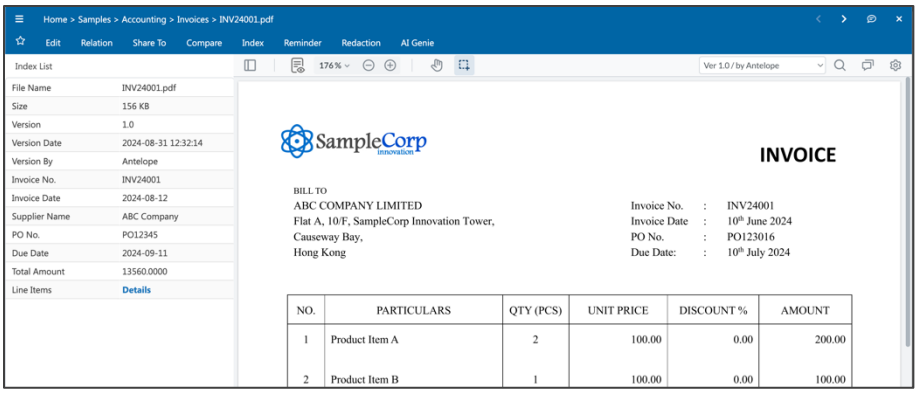
2. Click Preview button.



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



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



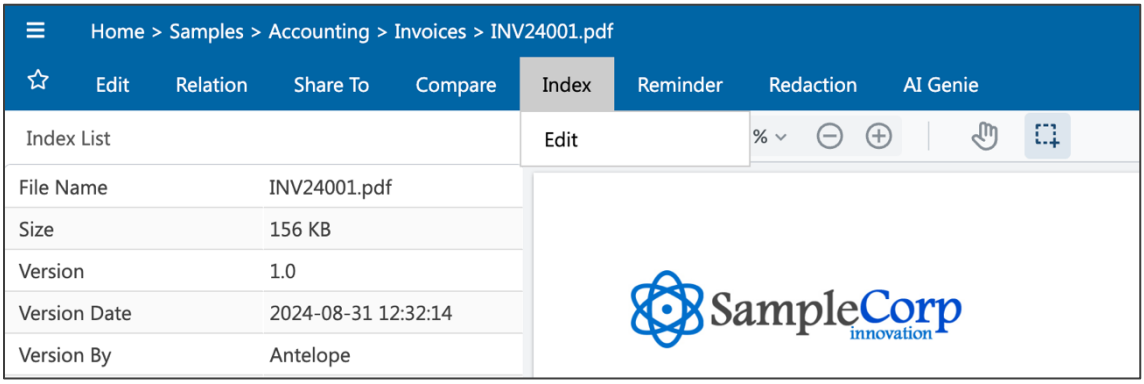
5. The following document type can be previewed on screen by default:

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

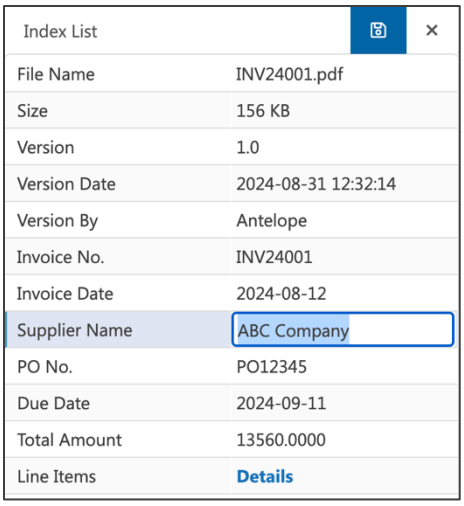
6. Note: The maximum size for document preview is 20 Mb.

III. Index Field

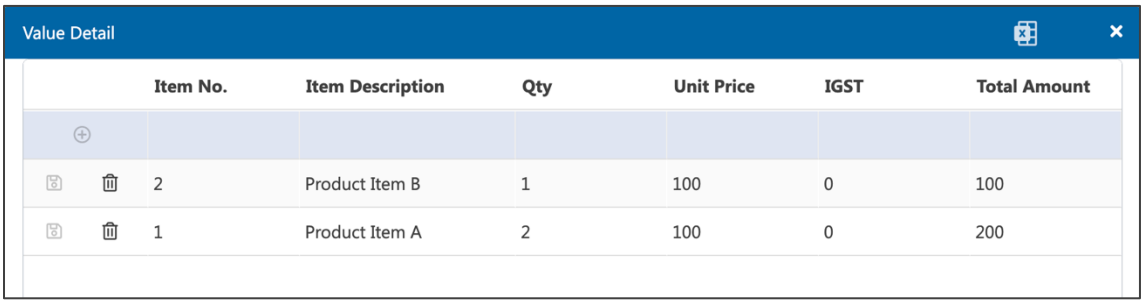
1. To index a document, from the document viewer toolbar, select Index > Edit.



2. Edit the document index.

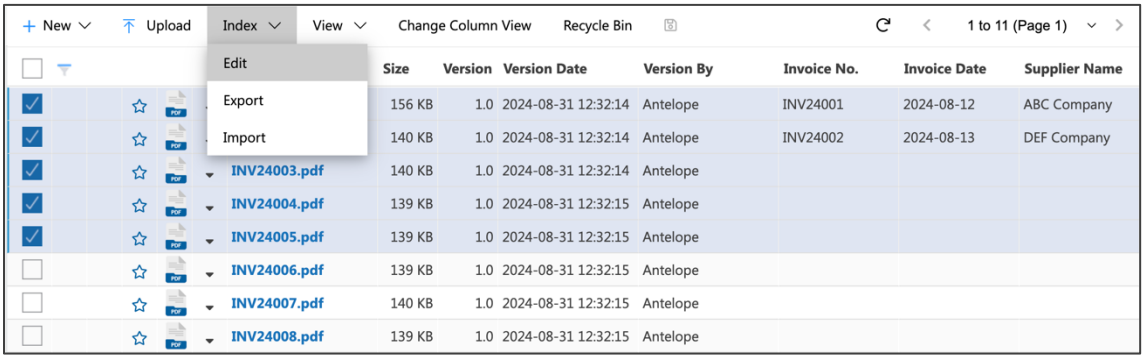


3. For line item, click the “Details” hyperlink to pop-up the line-item window.

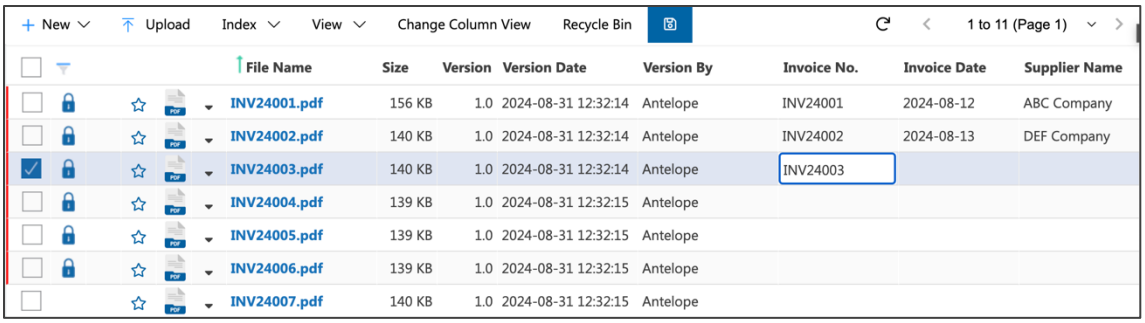


4. Click the blue save button to commit changes.

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

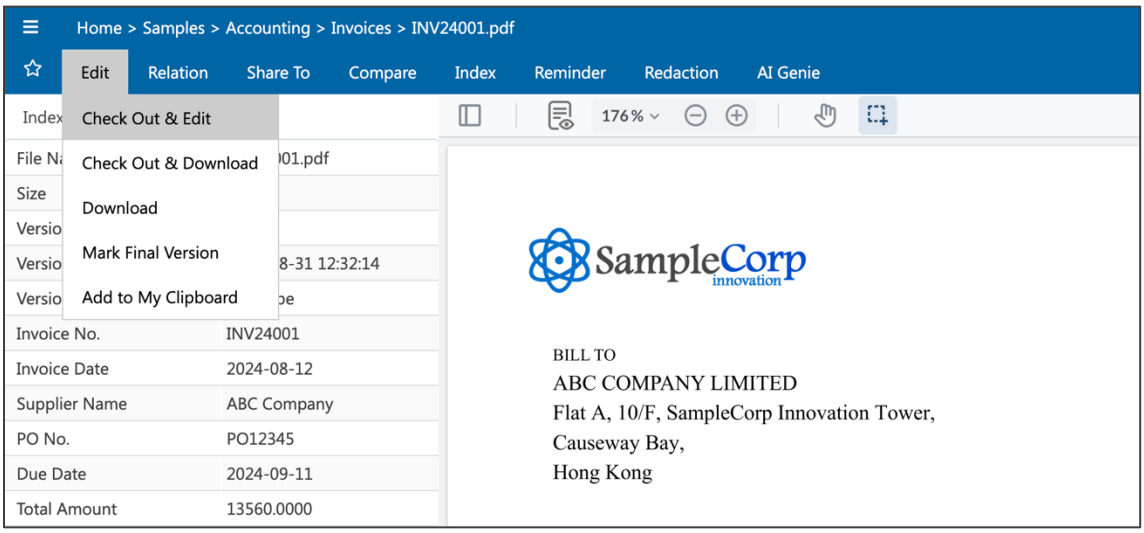


6. Edit the index and click the blue save button to commit changes.

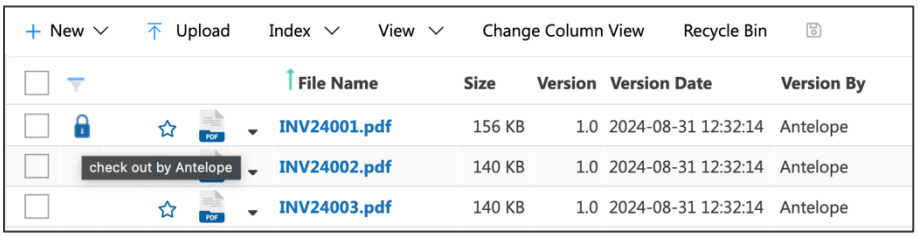


IV. Check-Out and Edit

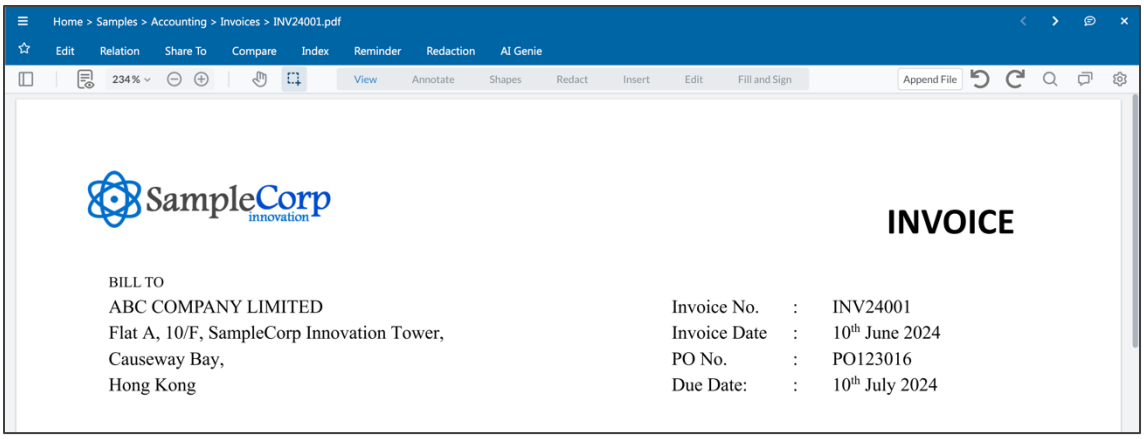
1. To check-out a document for annotation, from the document viewer toolbar, select Edit > Check Out & Edit.



2. The document is checked out and prevent other users from editing. A lock icon will appear beside the document and will show who has checked out the document.



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



V. Document Viewer Annotation

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

a. **Annotate**

Icon	Feature	Description / Sample
	Highlight	BILL TO ABC COMPANY LIMITED
	Underline	BILL TO ABC COMPANY LIMITED
	Strike Out	BILL TO ABC COMPANY LIMITED
	Squiggly	BILL TO ABC COMPANY LIMITED
	Note	
	Free Text	BILL TO ABC COMPANY LIMITED
	Rectangle	BILL TO ABC COMPANY LIMITED
	Free Hand	BILL TO ABC COMPANY LIMITED

	Free Hand Highlight	
	Redo / Undo	
	Eraser	Erase the annotation objects

b. **Shapes**

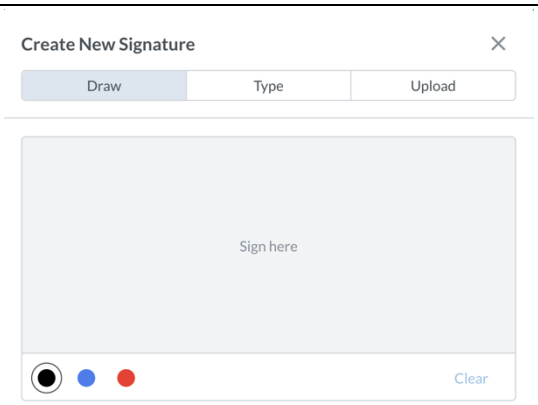
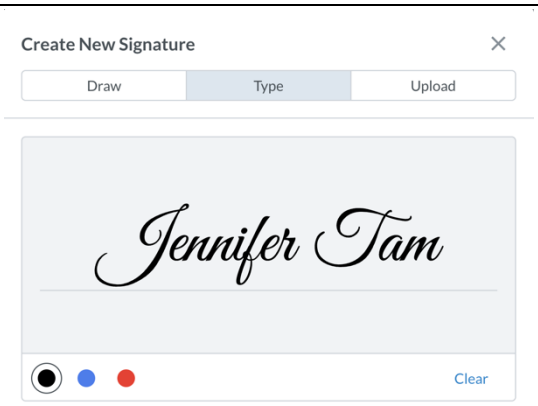
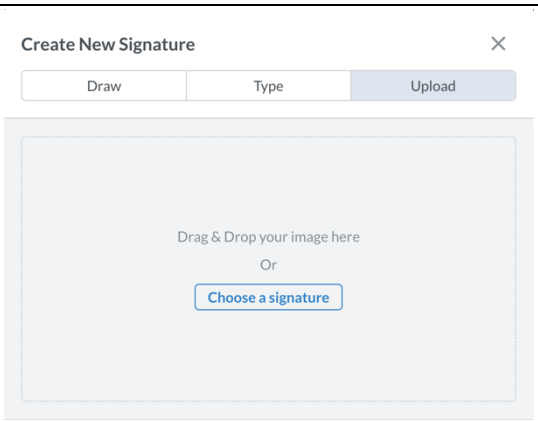
Icon	Feature	Description / Sample
	Free Hand	
	Free Hand Highlight	
	Rectangle	
	Ellipse	
	Polygon	
	Cloud	
	Line	
	Polyline	
	Arrow	

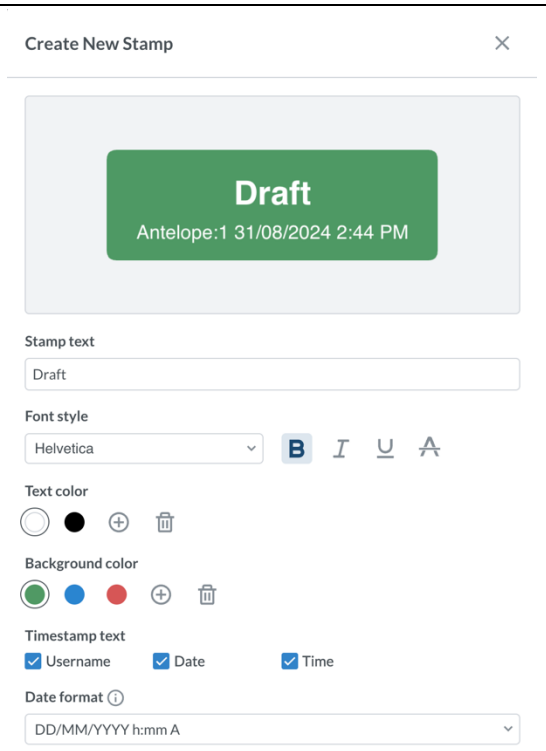
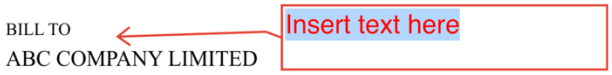
c. **Redact**

Icon	Feature	Description / Sample
	Mark for Redaction	
	Redact entire page	All redaction will be marked permenant 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)	

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

e. **Edit**

Icon	Feature	Description / Sample
	Crop Page	

f. **Fill and Sign**

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

	Calendar	BILL TO ABC COMPANY LIMITED 2024-08-31

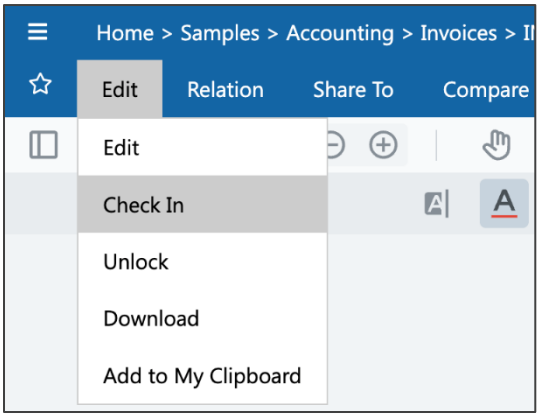
g. **Other Features**

Icon	Feature	Description / Sample
	Panel	View page thumbnails, outlines and signature list.
	Control	● View document as continuous page / page by page. ● Page rotation ● Page layout as single page / double page
234 %	Zooming	● Page zoom by percentage ● Zoom to width, zoom to height ● Marquee Zoom
	Menu	● Full screen ● Download PDF with / without annotation
	Search	Search within the PDF file.

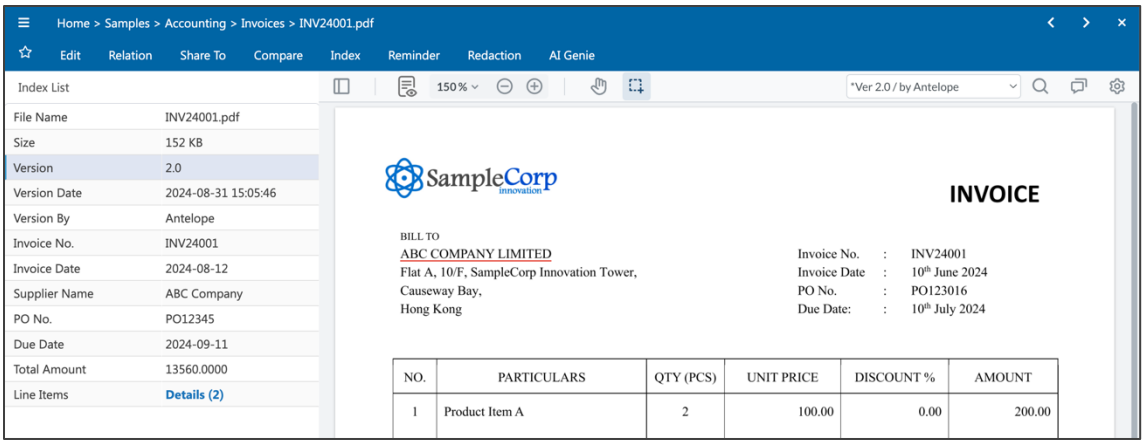
Note: For other documents like Microsoft® Office, CAD drawing, any annotation applied are only placed on the document preview version, it will not alert any of the original document.

VI. Check-In and Unlock Document

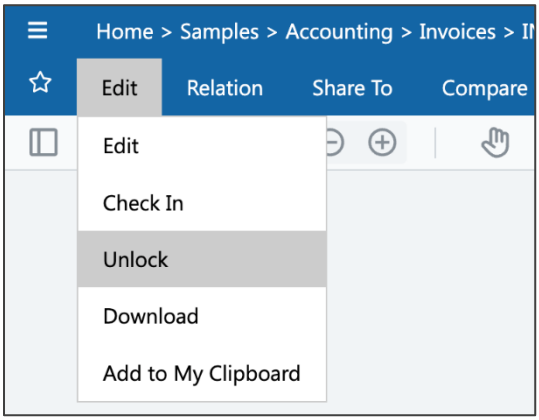
1. After you check-out a document for editing, you are required to check-in for saving. From the document viewer toolbar, select Edit > Check In.



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



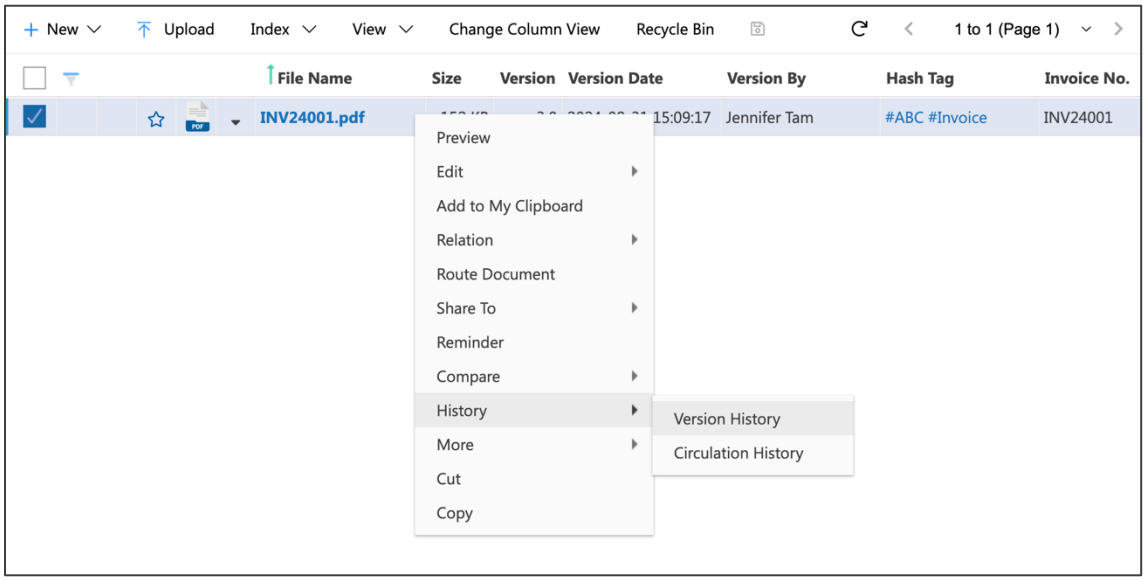
3. If you want to discard any changes, select Unlock instead.



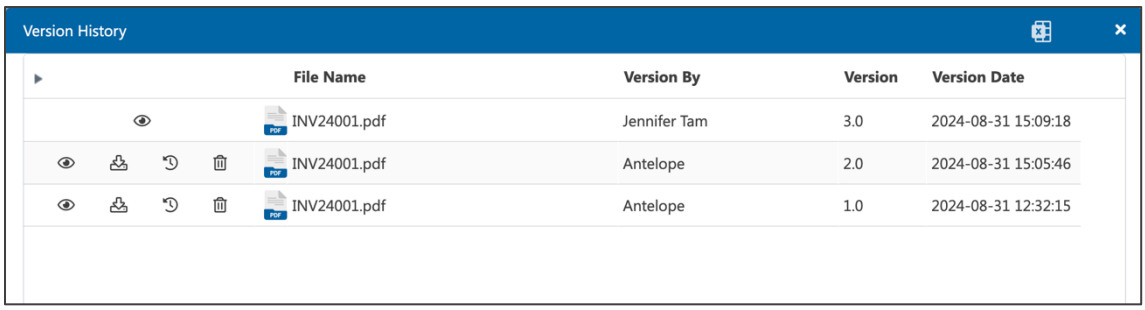
VII. Document Version

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

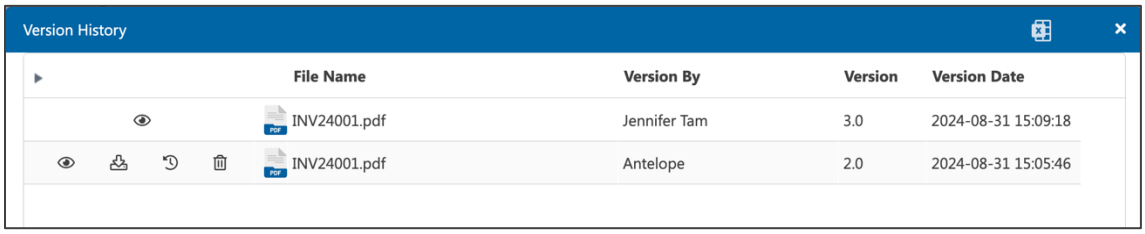
2. To view document version history, select the document, right click to bring up the context menu.



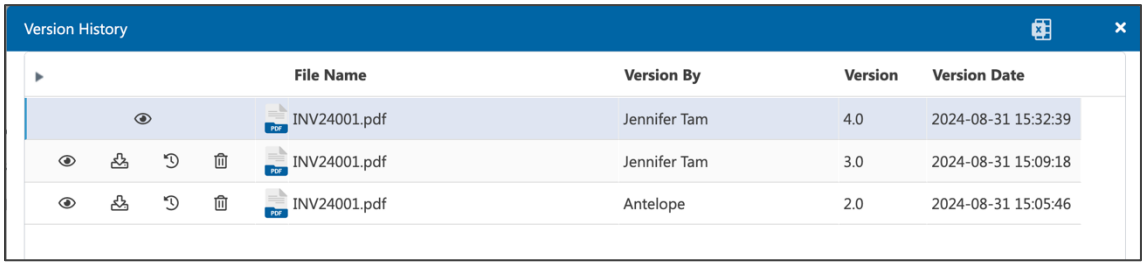
3. The version history window will appear.



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

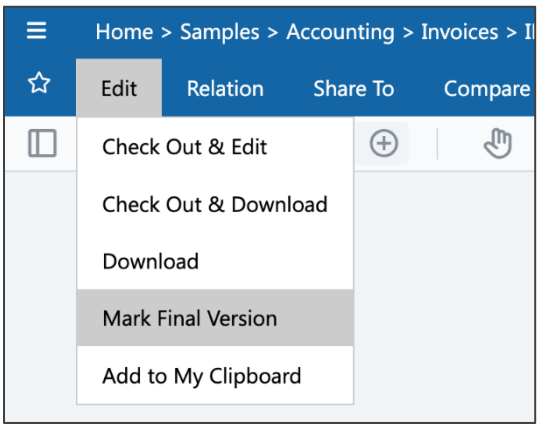


5. You can also restore the older version of document as the latest one by clicking the restore icon.

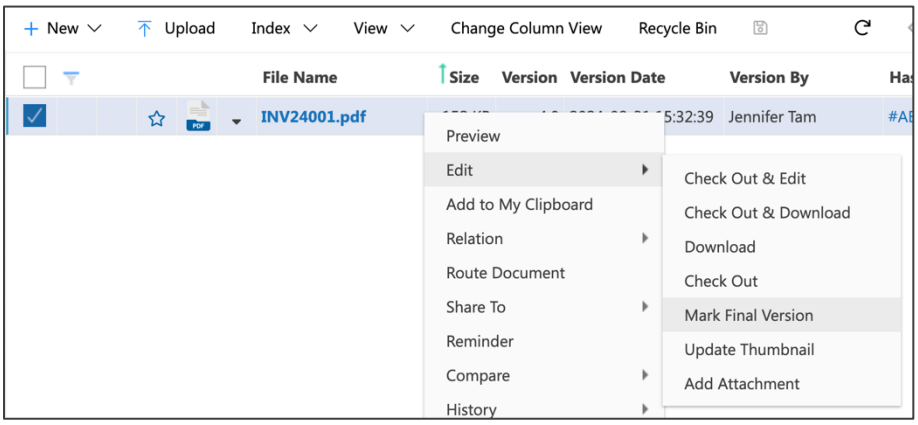


VIII. Mark and Revert Final Version

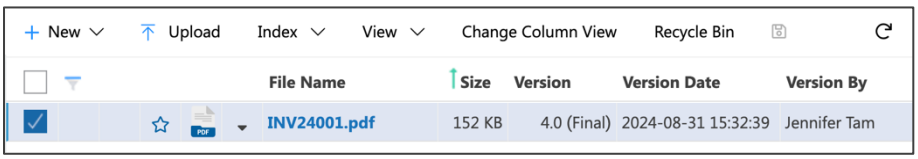
1. To mark a document as final version from further editing, from the document viewer toolbar, select Edit > Mark Final Version.



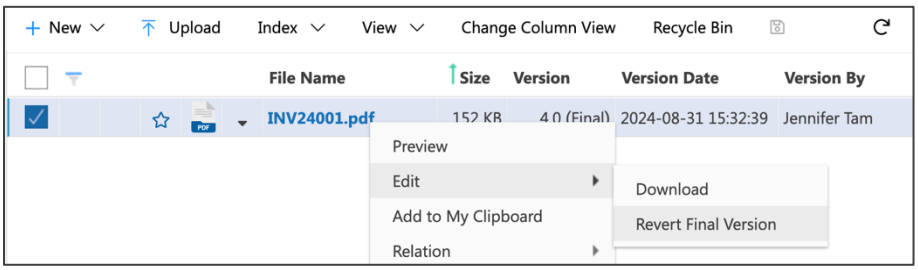
2. You can also mark as final version by bring up the context menu, select Edit > Mark Final Version.



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

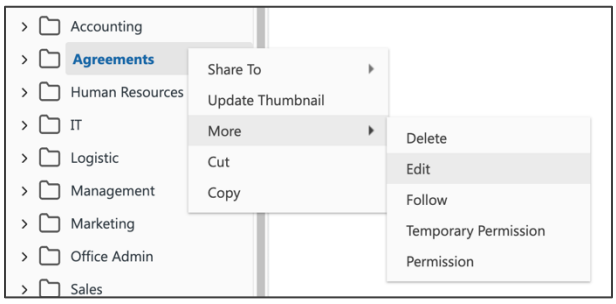


4. User with only manage rights or the document owner can revert the final version back to edit mode.

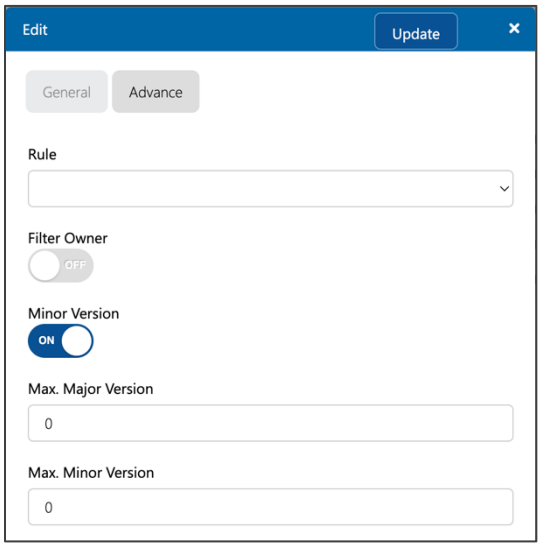


IX. Minor Version Update

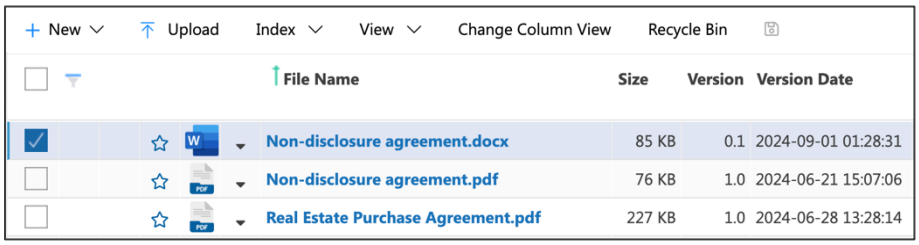
1. To enable minor version of document, select a folder, right click to bring up the context menu, then select “Edit”.



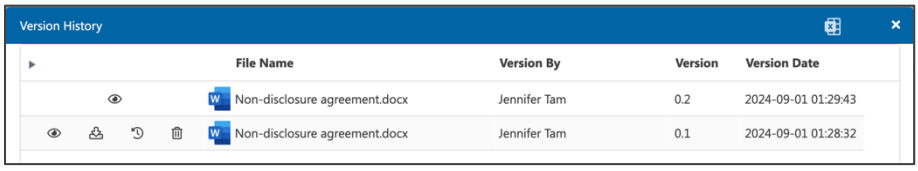
2. Enable minor version, then click the blue “Update” button to save changes.



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



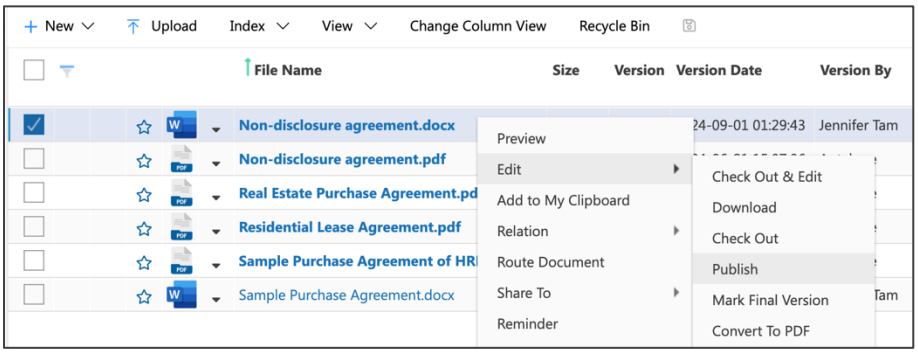
4. Whenever there are any changes, the version number will increment by 0.1.



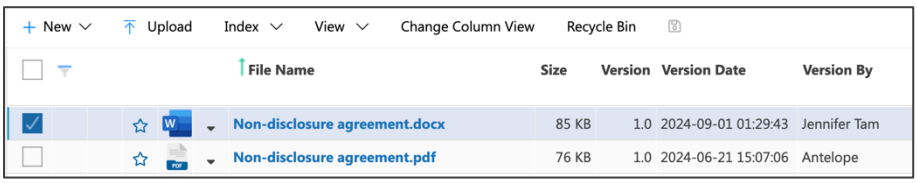
Note: User accounts without “manage” permission on the folder are not able to see the minor version of any documents, except the document owner himself/herself.

X. Publish Version

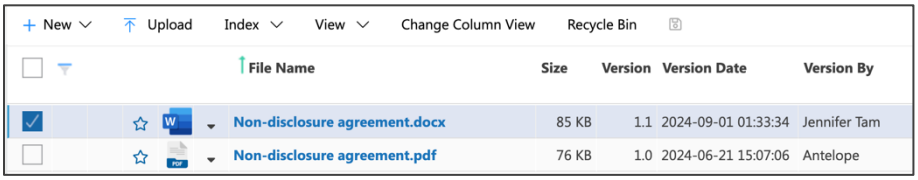
1. To public a minor version of document as major version, select the document, right click to bring up the context menu, then select “Edit > Publish”.



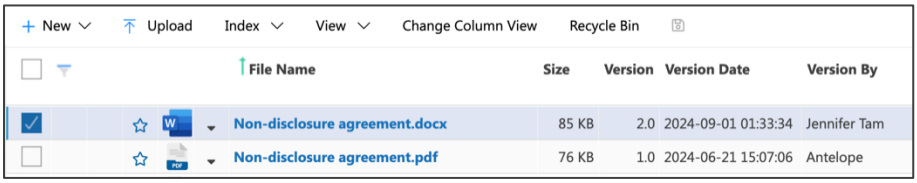
2. Once the document is published, the version number will become 1.0.



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



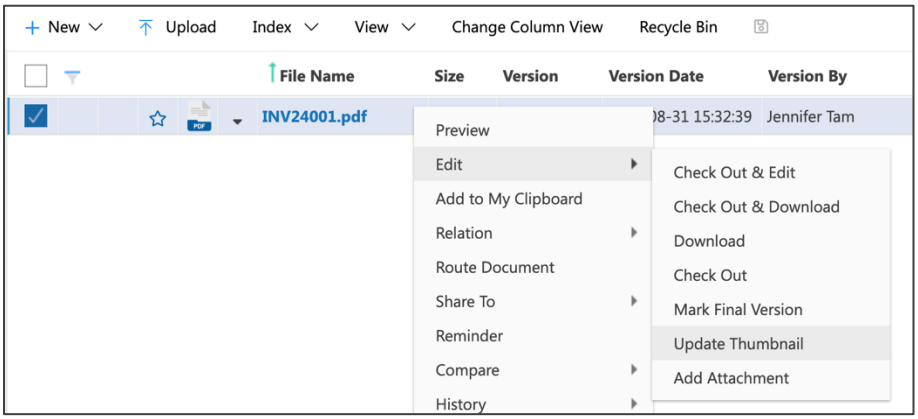
4. Until the document is published to major version.



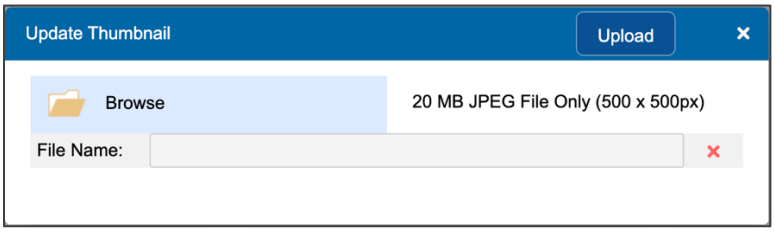
XI. Update Thumbnail

1. By default, some document types such as PDF, Microsoft Office documents and images can render with thumbnail view. In case some special document types which cannot be rendered and would like to have a thumbnail, you can upload a thumbnail image.

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



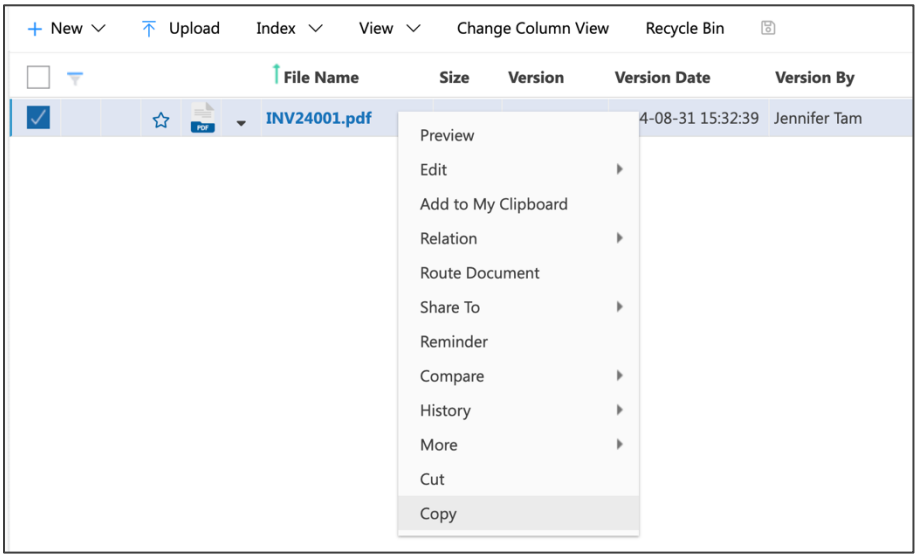
3. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click “Upload” button.



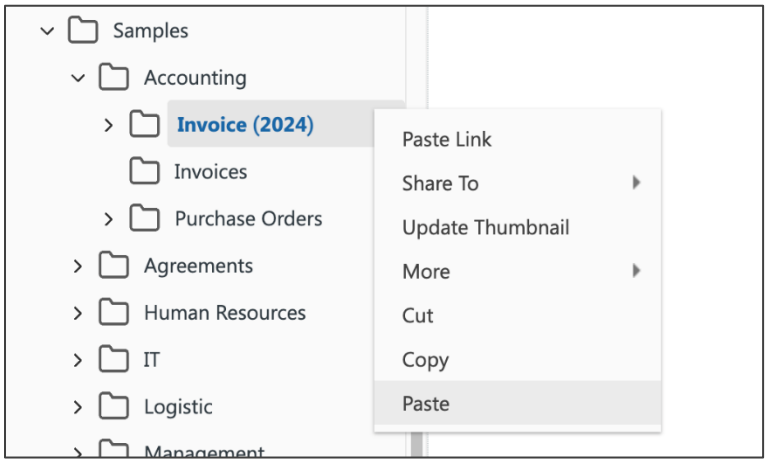
4. Click the blue Upload button to commit changes.

XII. Copy Document

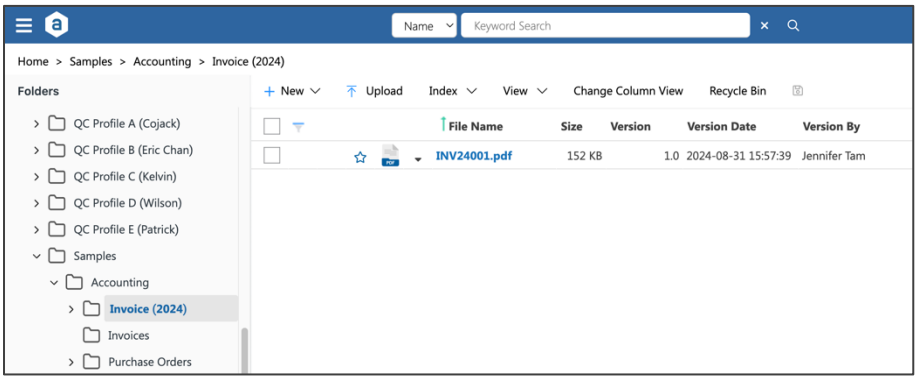
1. To copy a document, select the document from the document list, right click to bring up the context menu, select Copy.



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

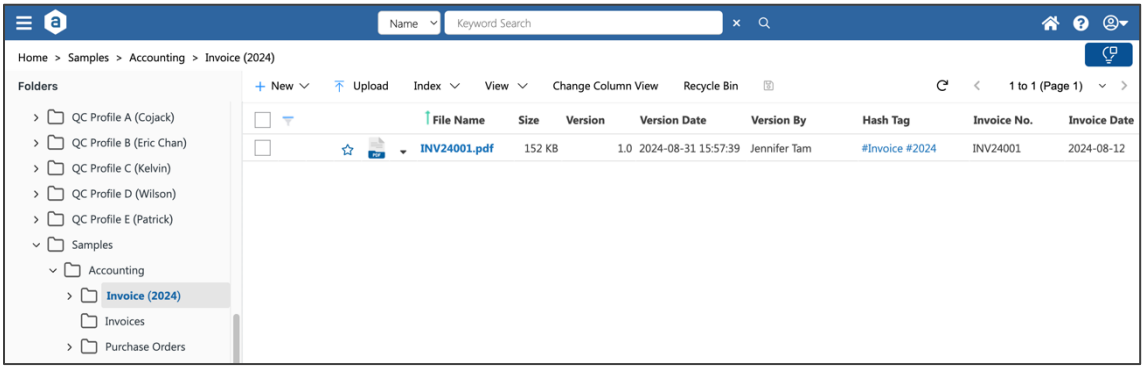


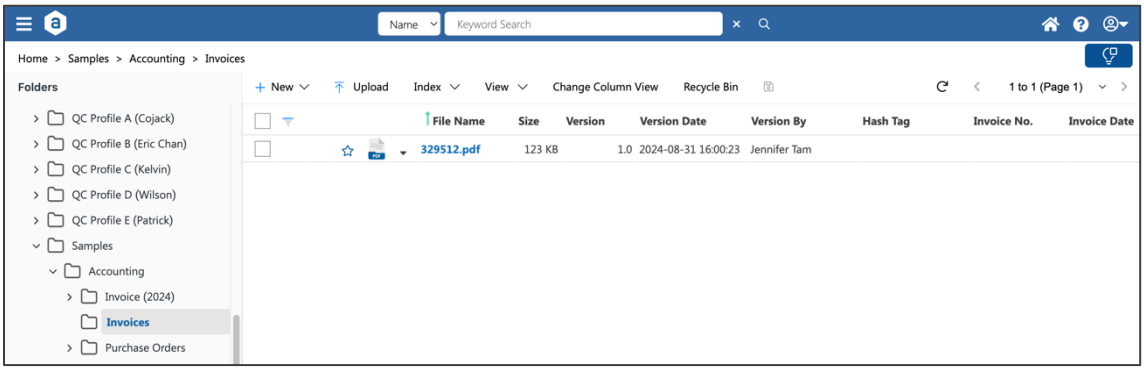
3. Both the document and index are pasted in the destination folder. Be notice that only the latest version will be copied and pasted.



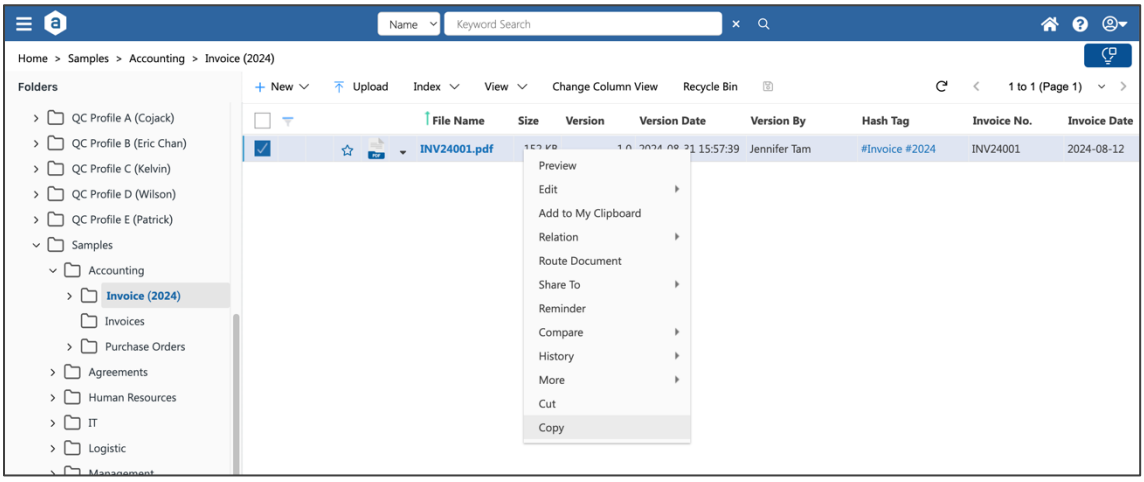
XIII. Copy and Paste Index

1. You can only copy the document index and paste onto another document profile only. For example, in the following case, the invoice in “Invoice (2024)” folder is well indexed, while the latter one contains only the document name.

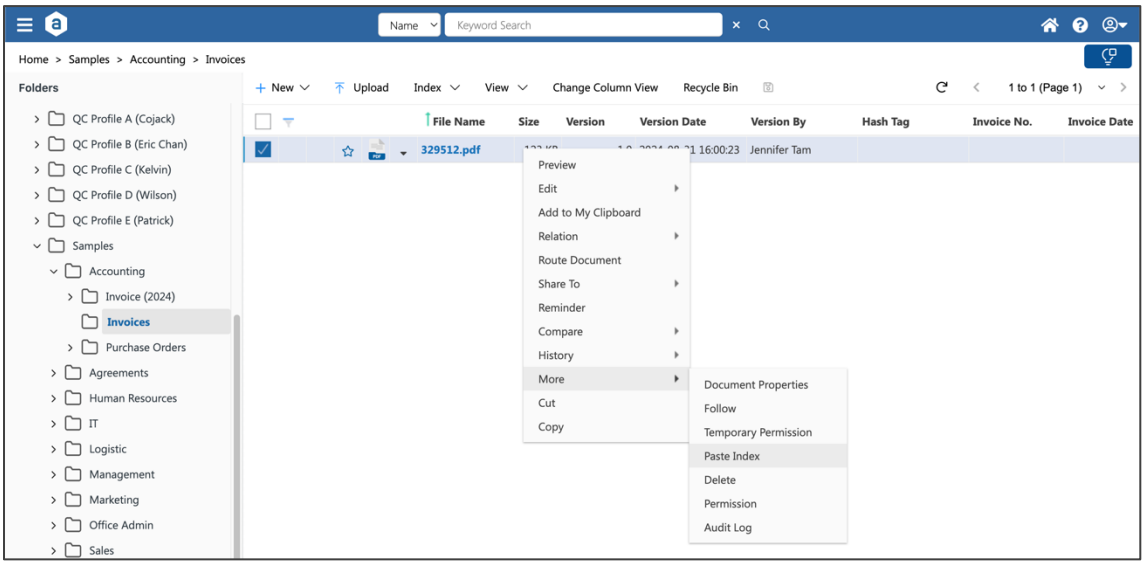




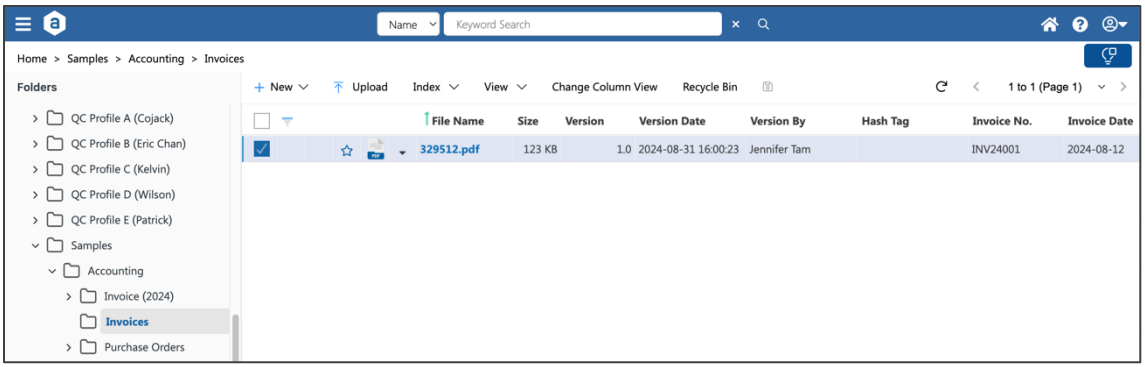
2. Copy the source document.



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

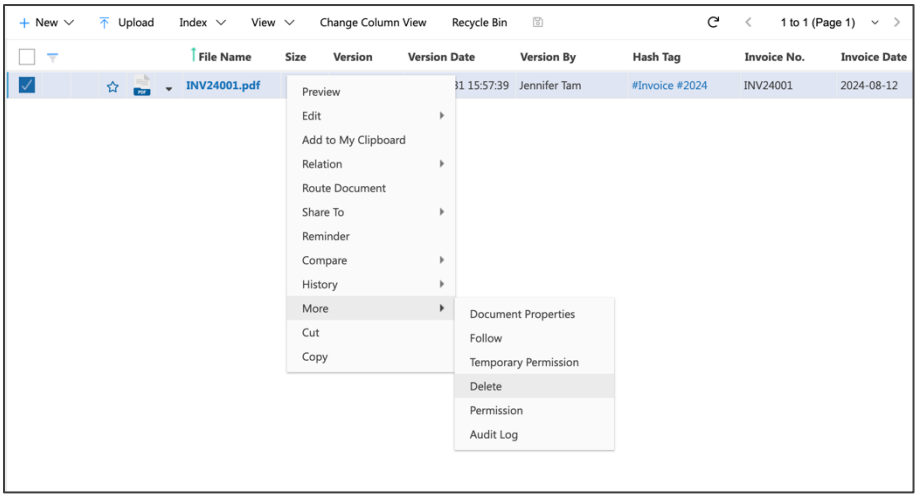


4. The destination document is now indexed with the original one.



XIV. Delete Document

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



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

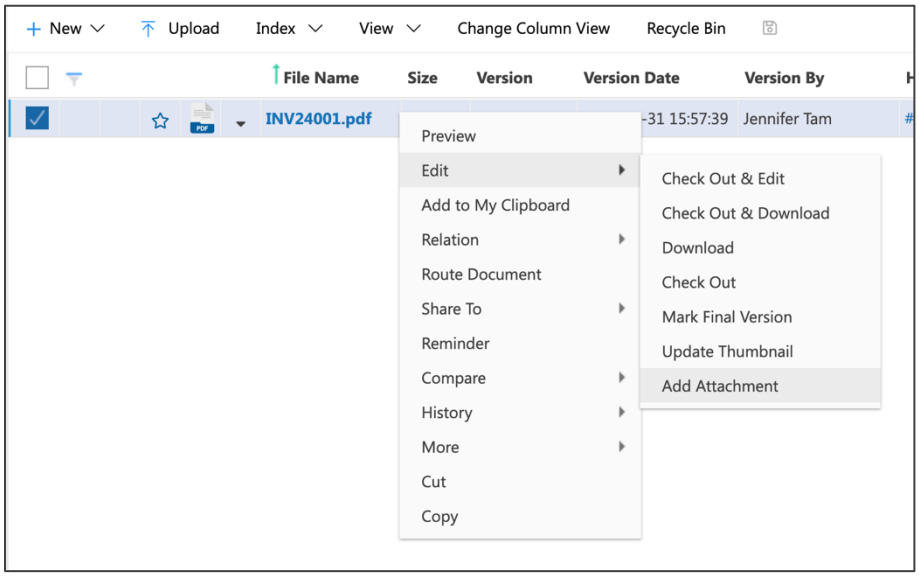
XV. Move Document

1. To move a document, drag and drop the document(s) from one folder to another. Bear in mind that you cannot drag either folder or document to the root (e.g. Home).

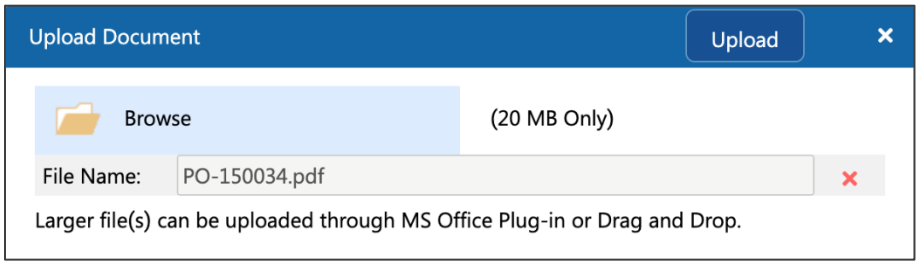
2. If the document profile between the source and destination folders are difference, some document index may not be able to inherit.

XVI. Add Attachment

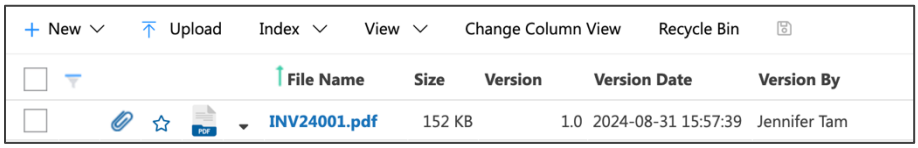
1. To add an attachment, select the document, right-click to bring up the context menu, and then select Edit > Add Attachment.



2. Browse the file to upload.

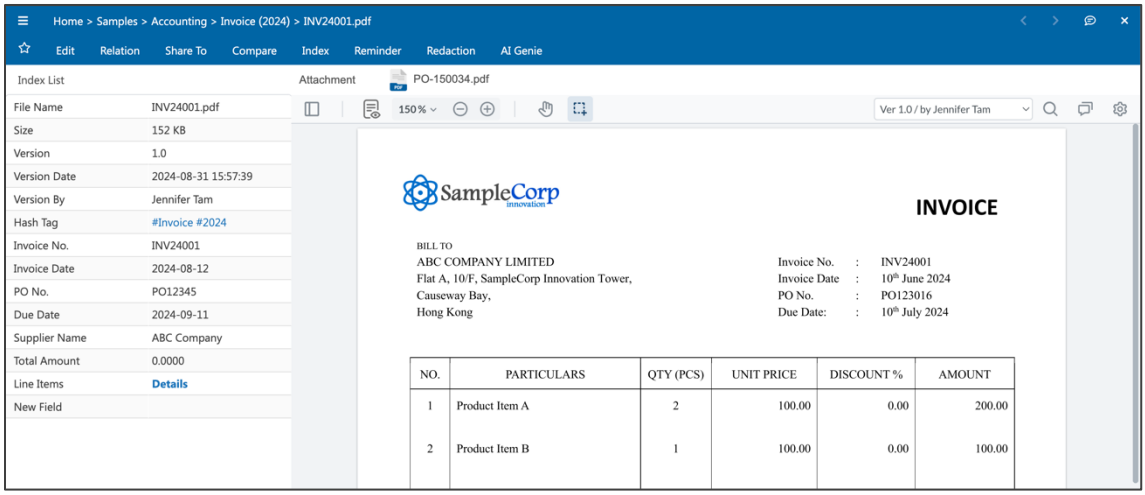


3. A clip icon will appear in the document. You can add multiple attachments to a single document.

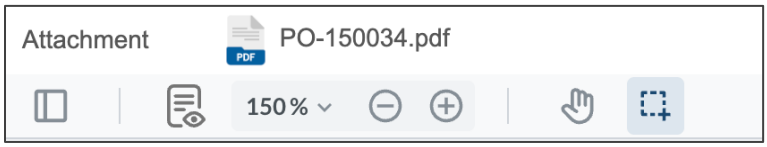


XVII. View Attachment

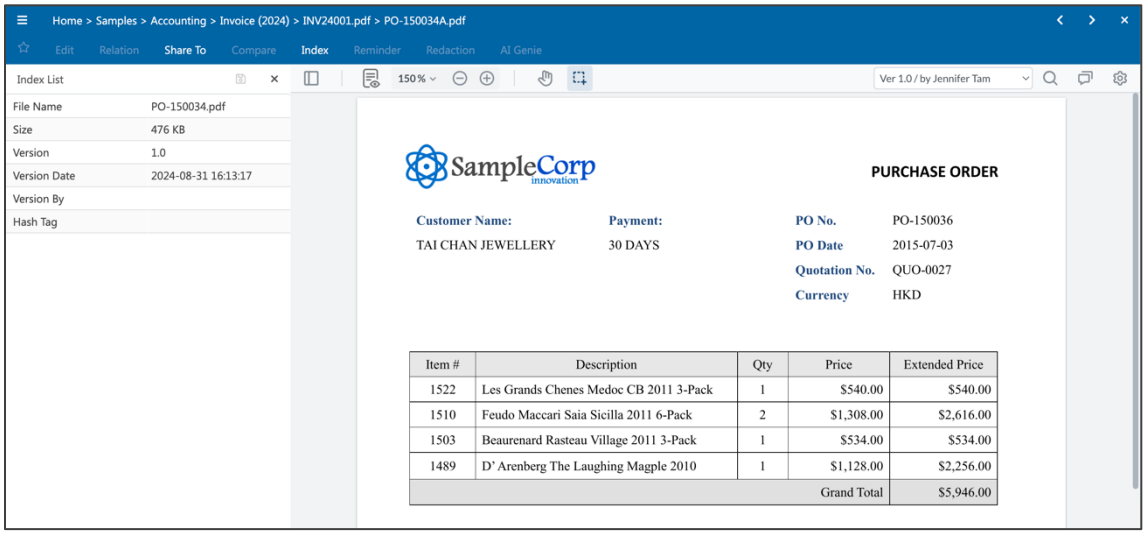
1. To view the attachment, open the document for preview.



2. The attachment is display above the annotation toolbar.



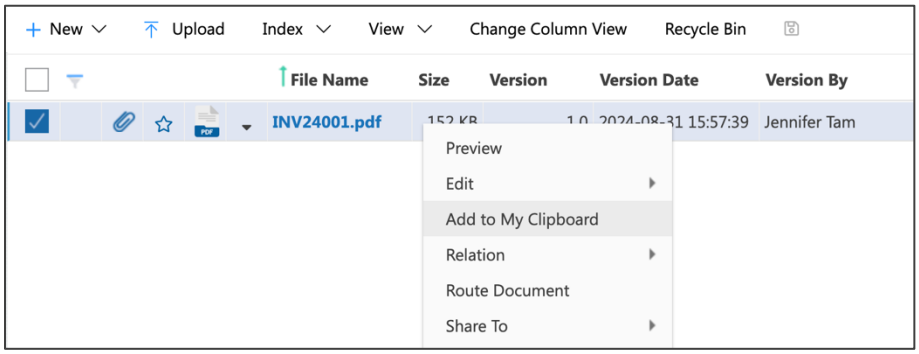
3. Click the attachment name to open for preview.



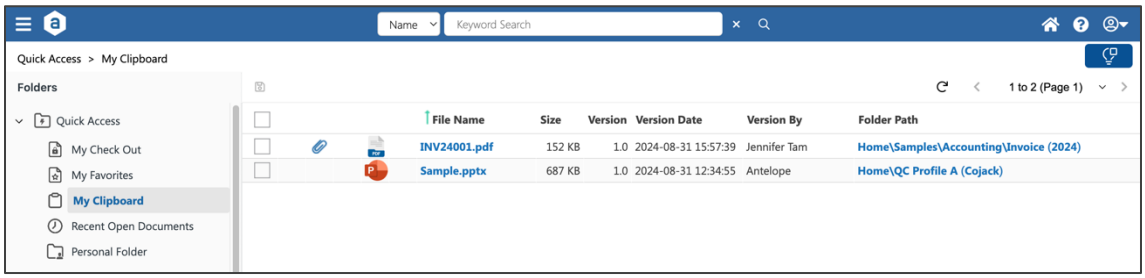
Note: You can only share and rename attachment.

XVIII. Add to My Clipboard

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



2. You can add multiple documents to clipboard.



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