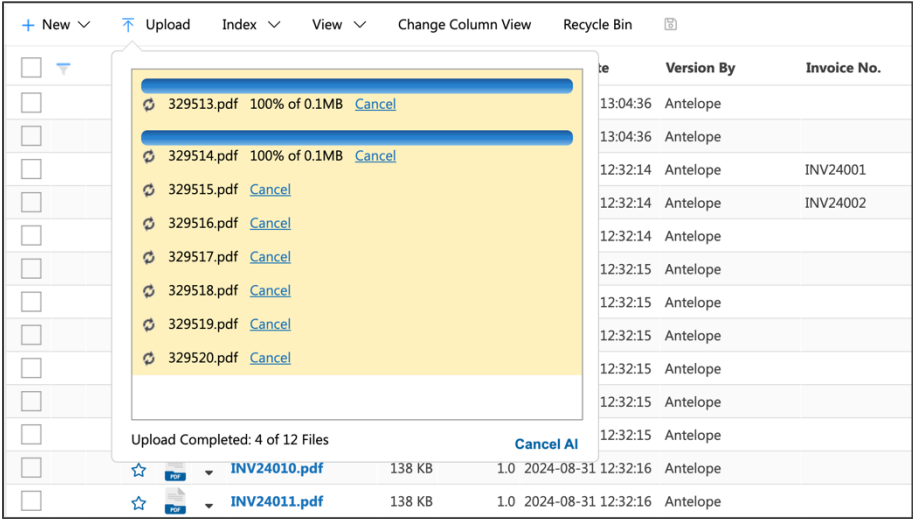


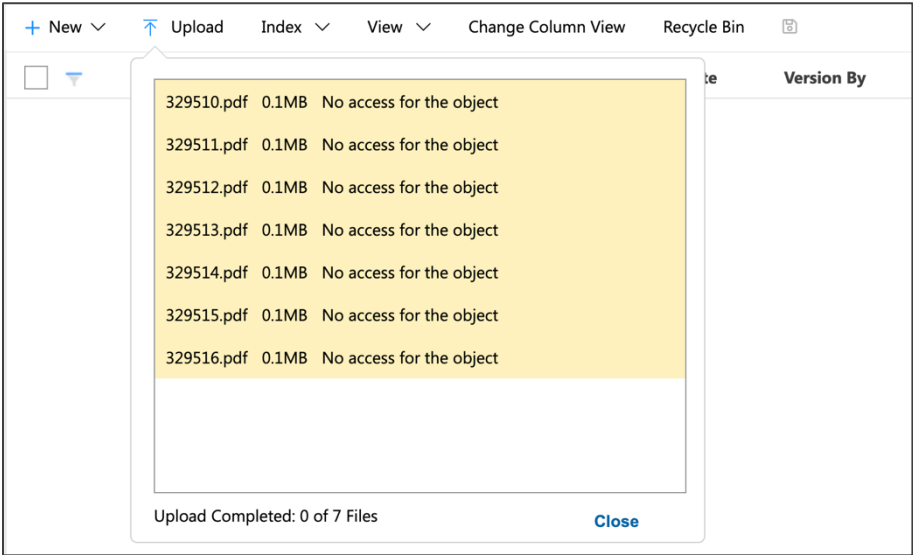
N. Document

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.

+ New ▾		↑ Upload	Index ▾	View ▾	Change Column View	Recycle Bin		
			File Name	Size	Version	Version Date	Version By	Invoice No.
<input type="checkbox"/>	☆		INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001
<input type="checkbox"/>	☆		INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002
<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	

2. Click Preview button.

INV24001.pdf ×

[Preview](#)
[Check Out & Download](#)
[Download](#)

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

Home > Samples > Accounting > Invoices > INV24001.pdf

[Edit](#)
[Relation](#)
[Share To](#)
[Compare](#)
[Index](#)
[Reminder](#)
[Redaction](#)
[AI Genie](#)

234% ▾

View 1.0 / by Antelope

SampleCorp
Innovation

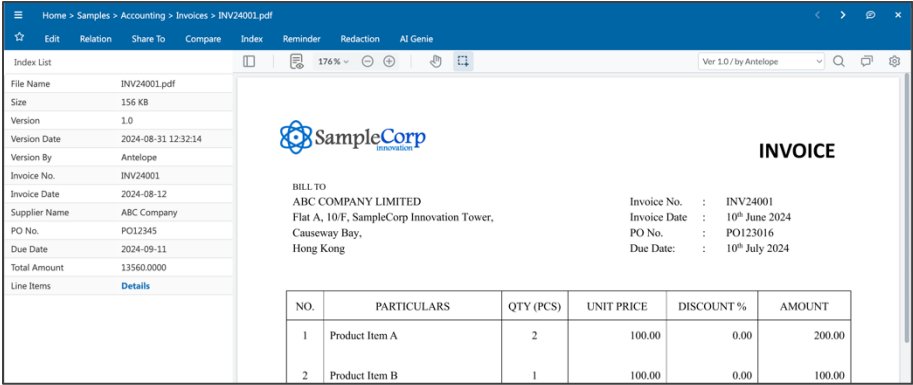
INVOICE

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

Invoice No. : INV24001
 Invoice Date : 10th June 2024
 PO No. : PO123016
 Due Date: : 10th July 2024

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

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



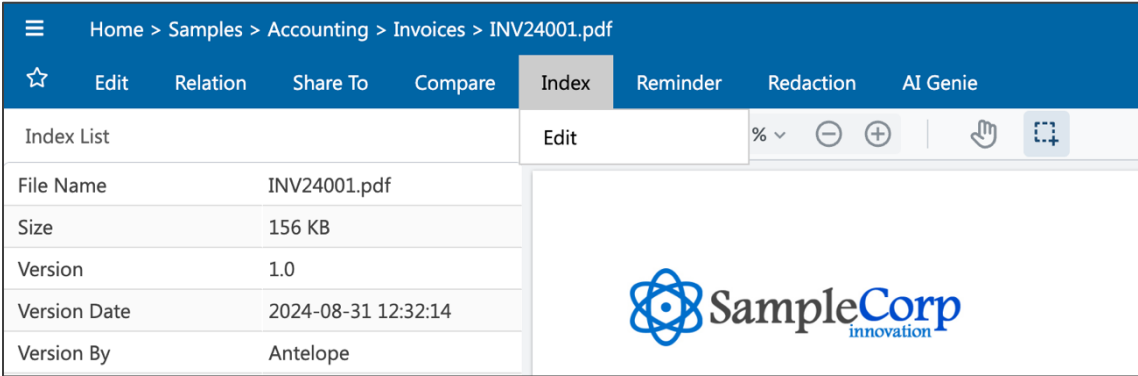
5. The following document type can be previewed on screen by default:

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.












































Index List			
File Name	INV24001.pdf		
Size	156 KB		
Version	1.0		
Version Date	2024-08-31 12:32:14		
Version By	Antelope		
Invoice No.	INV24001		
Invoice Date	2024-08-12		
Supplier Name	<input type="text" value="ABC Company"/>		
PO No.	PO12345		
Due Date	2024-09-11		
Total Amount	13560.0000		
Line Items	Details		

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

Value Detail								
	Item No.	Item Description	Qty	Unit Price	IGST	Total Amount		
								
 	2	Product Item B	1	100	0	100		
 	1	Product Item A	2	100	0	200		

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.

+ New  Upload  Index  View  Change Column View  Recycle Bin 									
1 to 11 (Page 1) 									
<input type="checkbox"/>					Size	Version	Version Date	Version By	Invoice No.
<input checked="" type="checkbox"/>					156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001
<input checked="" type="checkbox"/>					140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002
<input checked="" type="checkbox"/>					140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24003.pdf
<input checked="" type="checkbox"/>					139 KB	1.0	2024-08-31 12:32:15	Antelope	INV24004.pdf
<input checked="" type="checkbox"/>					139 KB	1.0	2024-08-31 12:32:15	Antelope	INV24005.pdf
<input type="checkbox"/>					139 KB	1.0	2024-08-31 12:32:15	Antelope	INV24006.pdf
<input type="checkbox"/>					140 KB	1.0	2024-08-31 12:32:15	Antelope	INV24007.pdf
<input type="checkbox"/>					139 KB	1.0	2024-08-31 12:32:15	Antelope	INV24008.pdf

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


+ New ▾		⬇️ Upload	Index ▾	View ▾	Change Column View	Recycle Bin		↺	<	1 to 11 (Page 1)		>
<input type="checkbox"/>		↑ 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.

Home > Samples > Accounting > Invoices > INV24001.pdf

	Edit	Relation	Share To	Compare	Index	Reminder	Redaction	AI Genie
Index	Check Out & Edit							
File Name	Check Out & Download							
Size	Download							
Version								
Version	Mark Final Version							
Version	Add to My Clipboard							
Invoice No.	INV24001							
Invoice Date	2024-08-12							
Supplier Name	ABC Company							
PO No.	PO12345							
Due Date	2024-09-11							
Total Amount	13560.0000							



SampleCorp

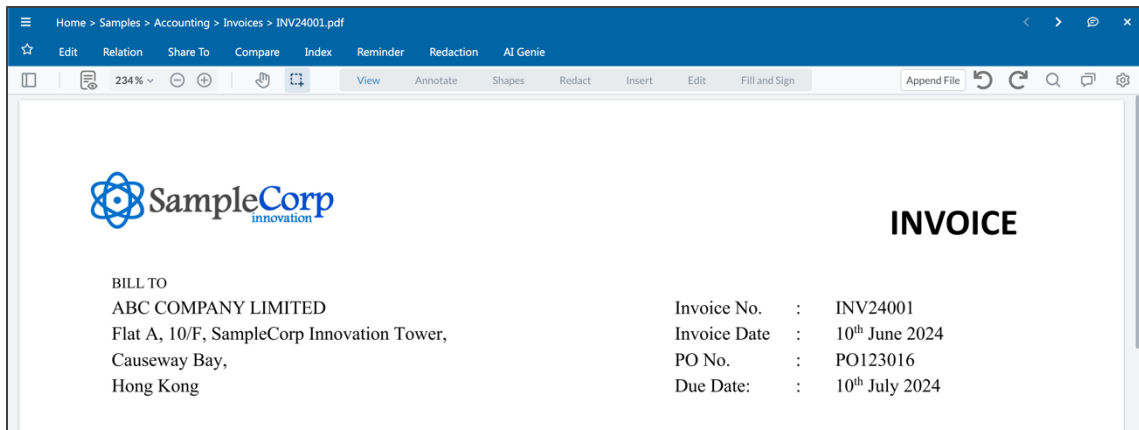
innovation

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.

+ New		Upload		Index	View	Change Column View	Recycle Bin	
<input type="checkbox"/>				File Name	Size	Version	Version Date	Version By
<input type="checkbox"/>				INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope
<input type="checkbox"/>	check out by Antelope			INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope
<input type="checkbox"/>				INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope

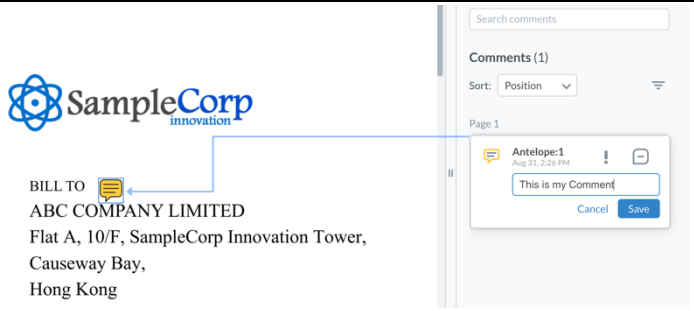
3. Upon check out, the annotation toolbar will be enabled.







V. Document Viewer Annotation


















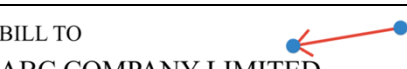
1. All electronic documents upload to Antelope 6 will have a PDF file rendered for online preview and annotation purpose. The annotation tool contains the following features that you can perform on the document preview version.

a. Annotate





Icon	Feature	Description / Sample
	Highlight	BILL TO ABC COMPANY LIMITED
	Underline	BILL TO 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	


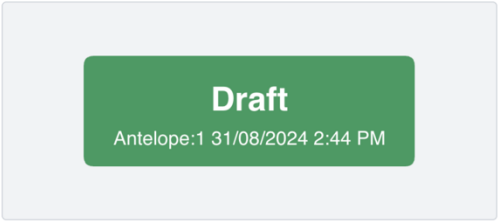




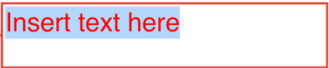
c. Redact

Icon	Feature	Description / Sample
	Mark for Redaction	
	Redact entire page	All redaction will be marked permanent and saved as another version.
	Redaction Panel	


d. Insert

Icon	Feature	Description / Sample
------	---------	----------------------







	Signature by Drawing	<div data-bbox="708 212 1241 584"> <div> <div>Create New Signature</div> <div>×</div> </div> <div> <div>Draw</div> <div>Type</div> <div>Upload</div> </div> <div> <div>Sign here</div> <div> <div></div> <div></div> <div></div> </div> <div>Clear</div> </div> </div>
	Signature by Type	<div data-bbox="708 629 1241 1001"> <div> <div>Create New Signature</div> <div>×</div> </div> <div> <div>Draw</div> <div>Type</div> <div>Upload</div> </div> <div> <div>Jennifer Tam</div> <div> <div></div> <div></div> <div></div> </div> <div>Clear</div> </div> </div>
	Signature by Upload image	<div data-bbox="708 1046 1241 1417"> <div> <div>Create New Signature</div> <div>×</div> </div> <div> <div>Draw</div> <div>Type</div> <div>Upload</div> </div> <div> <div> <div>Drag & Drop your image here</div> <div>Or</div> <div>Choose a signature</div> </div> </div> </div>
	Stamp (Standard)	<div data-bbox="708 1462 1011 1865"> <div> <div>APPROVED</div> <div>AS IS</div> </div> <div> <div>COMPLETED</div> <div>CONFIDENTIAL</div> </div> <div> <div>DEPARTMENTAL</div> <div>DRAFT</div> </div> <div> <div>EXPERIMENTAL</div> <div>EXPIRED</div> </div> <div> <div>FINAL</div> <div>FOR COMMENT</div> </div> <div> <div>FOR PUBLIC RELEASE</div> <div>INFORMATION ONLY</div> </div> <div> <div>NOT APPROVED</div> <div>NOT FOR PUBLIC RELEASE</div> </div> <div> <div>PRELIMINARY RESULTS</div> <div>SOLD</div> </div> </div>

	Stamp (Custom)	<div> <div>Create New Stamp ×</div> <div>  </div> <div> <div>Stamp text</div> <input type="text" value="Draft"/> </div> <div> <div>Font style</div> <div> <div>Helvetica</div> <div> B <i>I</i> <u>U</u> A </div> </div> </div> <div> <div>Text color</div> <div> <div></div> <div></div> <div>+</div> <div>✕</div> </div> </div> <div> <div>Background color</div> <div> <div></div> <div></div> <div></div> <div>+</div> <div>✕</div> </div> </div> <div> <div>Timestamp text</div> <div> <input checked="" type="checkbox"/> Username <input checked="" type="checkbox"/> Date <input checked="" type="checkbox"/> Time </div> </div> <div> <div>Date format ⓘ</div> <div>DD/MM/YYYY h:mm A</div> </div> </div>
	Image	Either JPG or PNG format.
	File Attachment	Attach any electronic file, double click to download BILL TO ABC COMPANY LIMITED 
	Call Out	BILL TO ABC COMPANY LIMITED 

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
---	----------	--

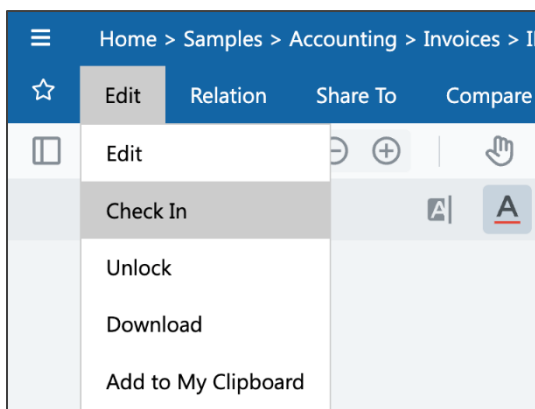
g. **Other Features**

Icon	Feature	Description / Sample
	Panel	View page thumbnails, outlines and signature list.
	Control	<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.

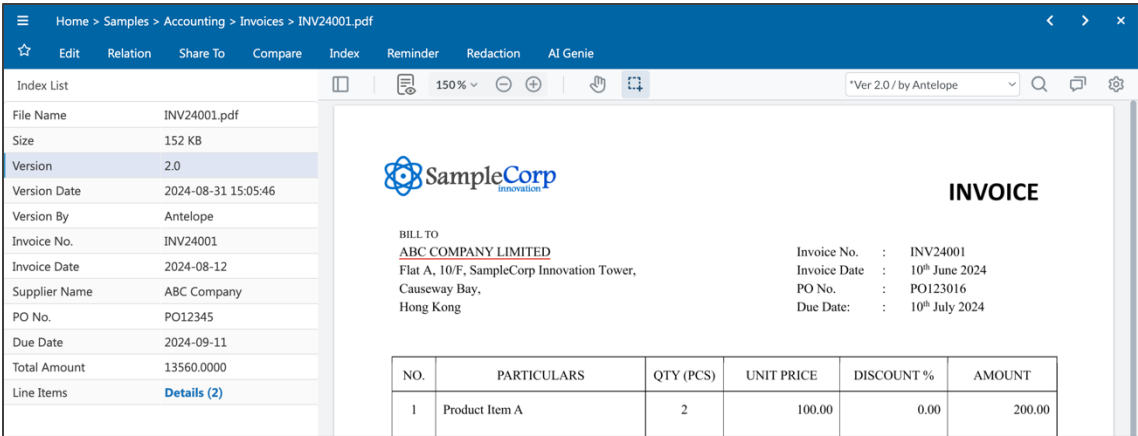
Note: For other documents like Microsoft® Office, CAD drawing, any annotation applied are only placed on the document preview version, it will not alert any of the original document.

VI. Check-In and Unlock Document

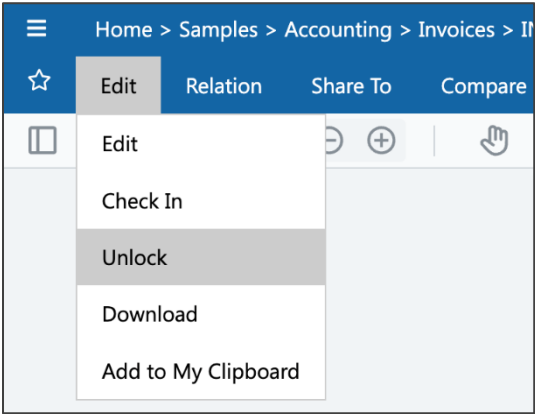
1. After you check-out a document for editing, you are required to check-in for saving. From the document viewer toolbar, select Edit > Check In.



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

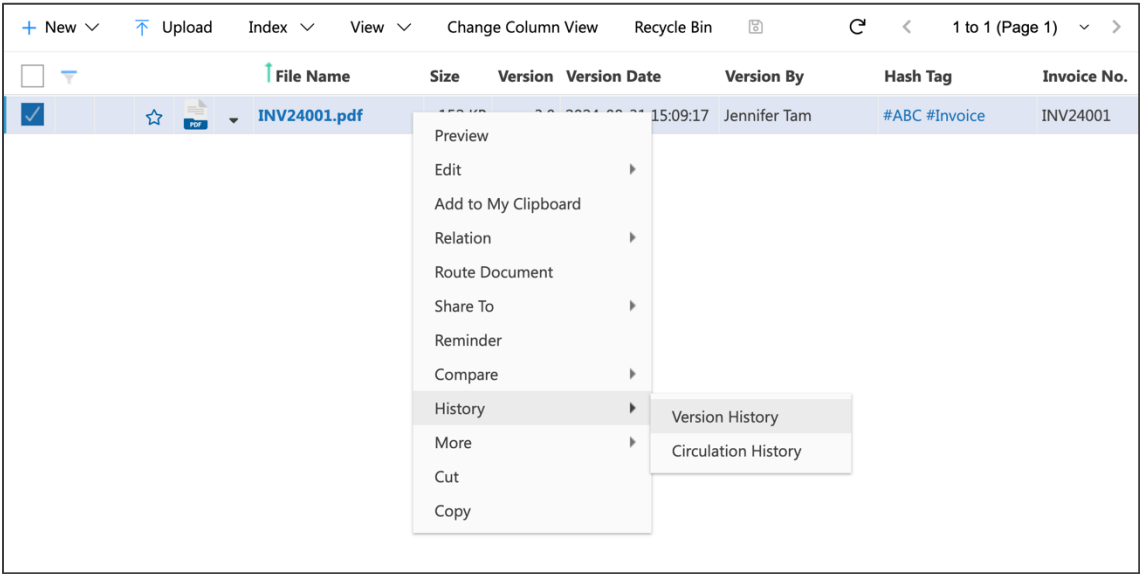


3. If you want to discard any changes, select Unlock instead.

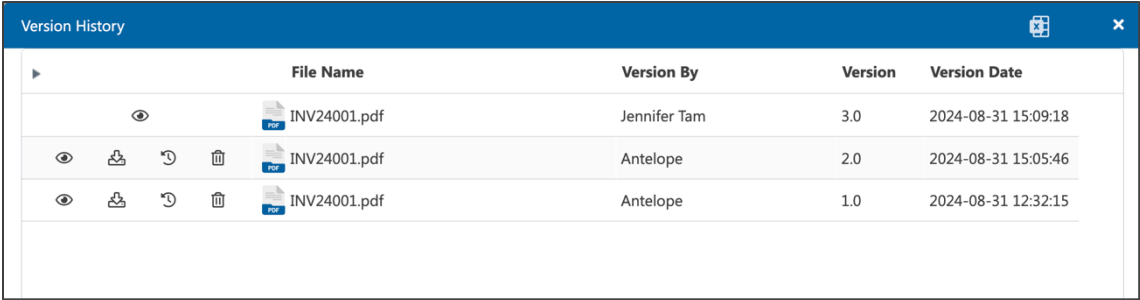


VII. Document Version

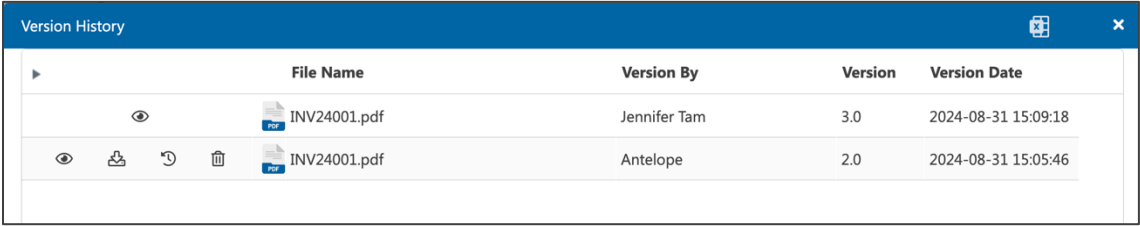
1. A document will have version increment either by one of the following actions:
 - a. A new document is uploaded and overwrite the original one.
 - b. Annotation is applied on the document preview.
 - c. The document is check-out for content editing and check-in again.
 - d. A scanned document is uploaded and converted into searchable PDF.
2. To view document version history, select the document, right click to bring up the context menu.



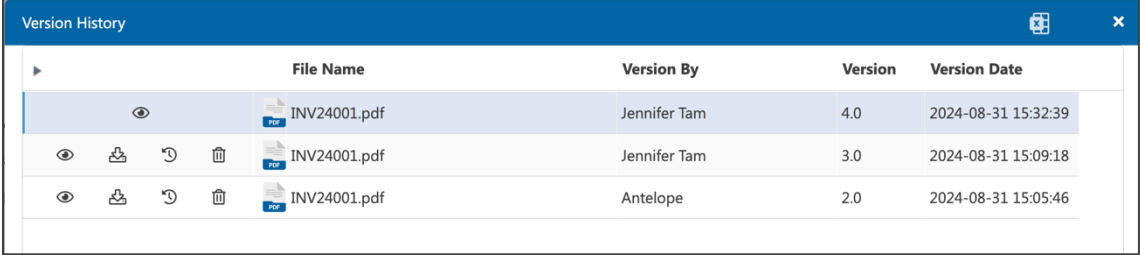
3. The version history window will appear.



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

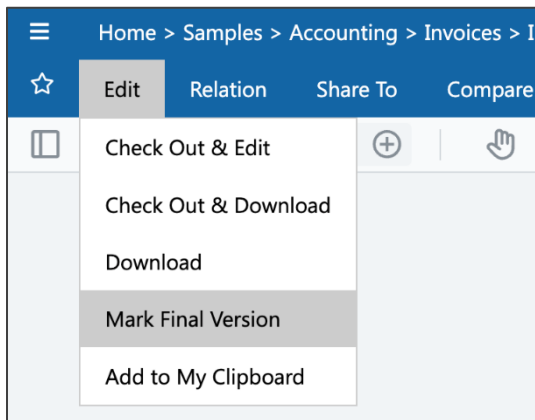


5. You can also restore the older version of document as the latest one by clicking the restore icon.

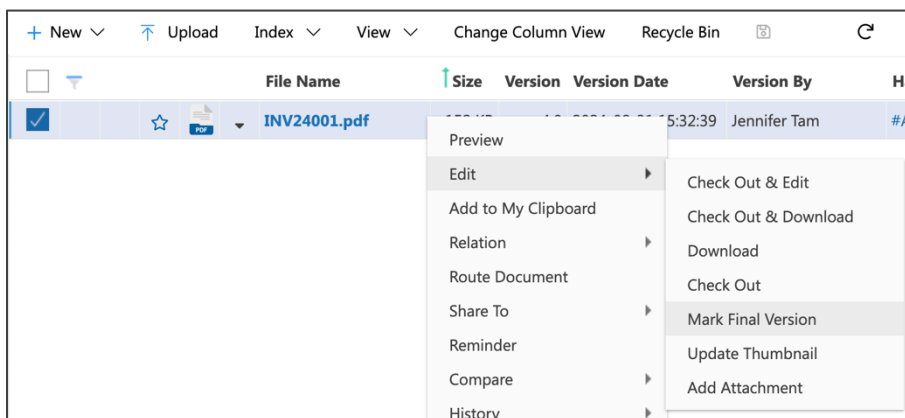


VIII. Mark and Revert Final Version

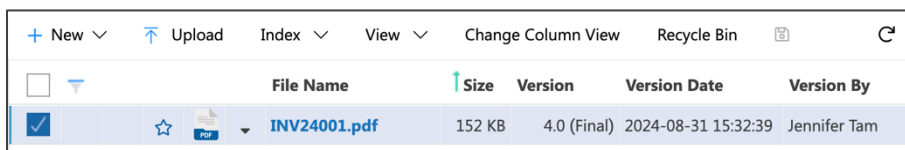
1. To mark a document as final version from further editing, from the document viewer toolbar, select Edit > Mark Final Version.



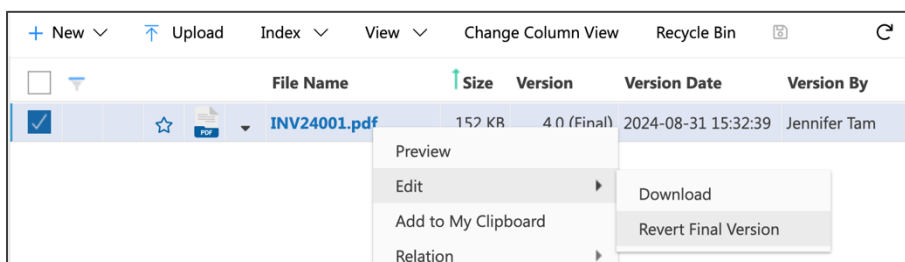
2. You can also mark as final version by bring up the context menu, select Edit > Mark Final Version.



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

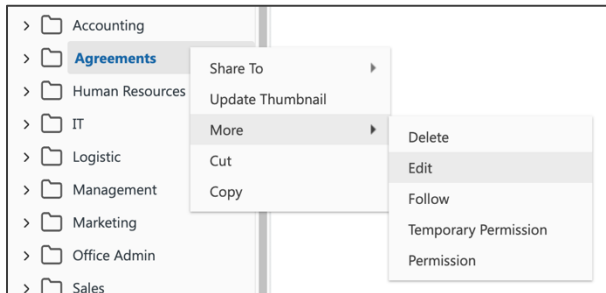


4. User with only manage rights or the document owner can revert the final version back to edit mode.



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.

A screenshot of the 'Edit' dialog box. It has tabs for 'General' and 'Advance'. The 'Advance' tab is selected. Under 'Rule', there is a dropdown menu. Under 'Filter Owner', there is a toggle switch set to 'OFF'. Under 'Minor Version', there is a toggle switch set to 'ON'. Below this are two input fields: 'Max. Major Version' with the value '0' and 'Max. Minor Version' with the value '0'. A blue 'Update' button is in the top right corner.

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

<div>+ New</div>		<div>⤴ Upload</div>	<div>Index</div>	<div>View</div>	<div>Change Column View</div>	<div>Recycle Bin</div>	<div></div>
<div><input type="checkbox"/></div>	<div></div>	<div>↑ File Name</div>			<div>Size</div>	<div>Version</div>	<div>Version Date</div>
<div><input checked="" type="checkbox"/></div>	<div> </div>	<div>Non-disclosure agreement.docx</div>			<div>85 KB</div>	<div>0.1</div>	<div>2024-09-01 01:28:31</div>
<div><input type="checkbox"/></div>	<div> </div>	<div>Non-disclosure agreement.pdf</div>			<div>76 KB</div>	<div>1.0</div>	<div>2024-06-21 15:07:06</div>
<div><input type="checkbox"/></div>	<div> </div>	<div>Real Estate Purchase Agreement.pdf</div>			<div>227 KB</div>	<div>1.0</div>	<div>2024-06-28 13:28:14</div>

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

Version History				
File Name	Version By	Version	Version Date	
Non-disclosure agreement.docx	Jennifer Tam	0.2	2024-09-01 01:29:43	
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.

<div>+ New</div>		<div>Upload</div>	<div>Index</div>	<div>View</div>	<div>Change Column View</div>	<div>Recycle Bin</div>	<div></div>
<div><input type="checkbox"/></div>	<div></div>	<div>File Name</div>	<div>Size</div>	<div>Version</div>	<div>Version Date</div>	<div>Version By</div>	
<div><input checked="" type="checkbox"/></div>	<div><div><div></div><div></div><div></div></div></div>	<div>Non-disclosure agreement.docx</div>	<div>85 KB</div>	<div>1.0</div>	<div>2024-09-01 01:29:43</div>	<div>Jennifer Tam</div>	
<div><input type="checkbox"/></div>	<div><div><div></div><div></div><div></div></div></div>	<div>Non-disclosure agreement.pdf</div>	<div>76 KB</div>	<div>1.0</div>	<div>2024-06-21 15:07:06</div>	<div>Antelope</div>	

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

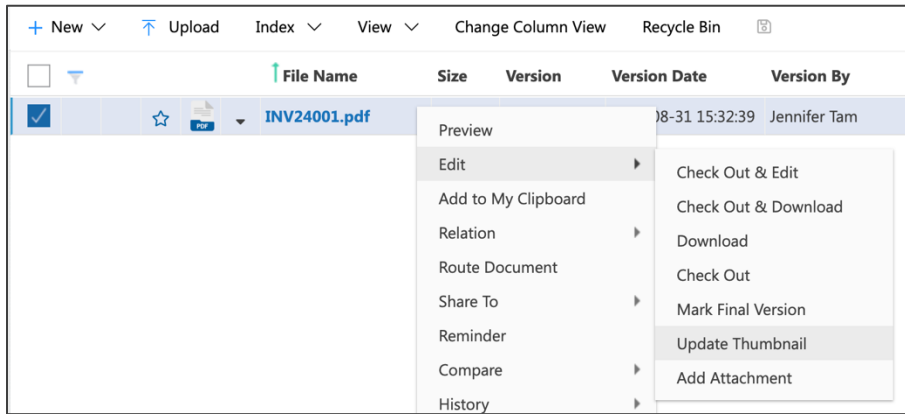
+ New ▾							
Upload							
Index ▾							
View ▾							
Change Column View							
Recycle Bin							
<input type="checkbox"/>			File Name	Size	Version	Version Date	Version By
<input checked="" type="checkbox"/>			Non-disclosure agreement.docx	85 KB	1.1	2024-09-01 01:33:34	Jennifer Tam
<input type="checkbox"/>			Non-disclosure agreement.pdf	76 KB	1.0	2024-06-21 15:07:06	Antelope

4. Until the document is published to major version.

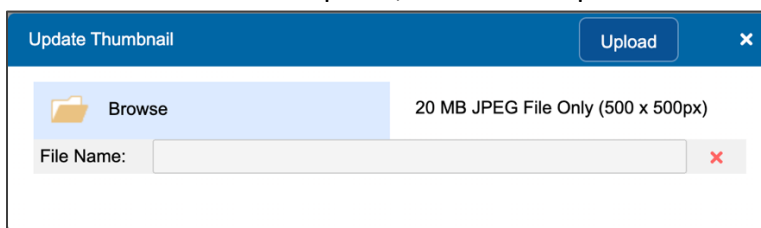
+ New		Upload	Index	View	Change Column View	Recycle Bin	
<input type="checkbox"/>			File Name	Size	Version	Version Date	Version By
<input checked="" type="checkbox"/>			Non-disclosure agreement.docx	85 KB	2.0	2024-09-01 01:33:34	Jennifer Tam
<input type="checkbox"/>			Non-disclosure agreement.pdf	76 KB	1.0	2024-06-21 15:07:06	Antelope

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.



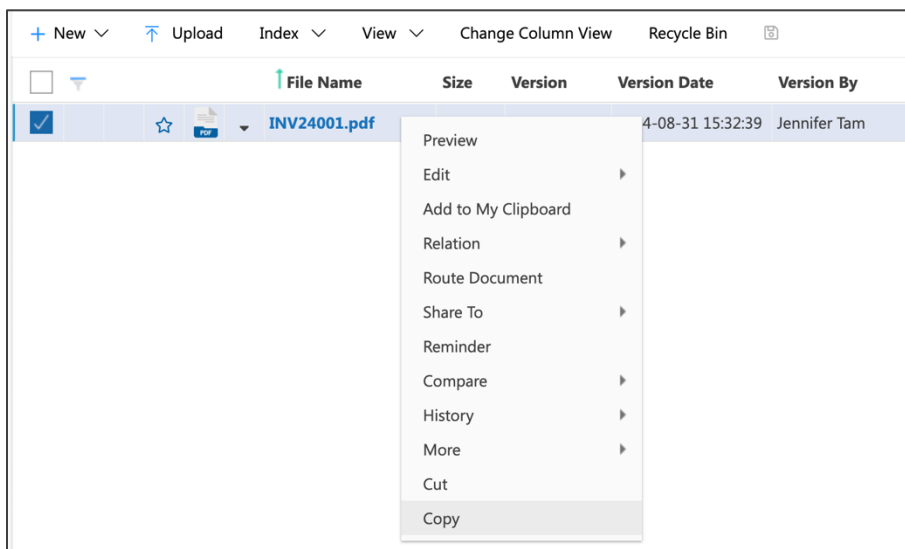
3. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click “Upload” button.



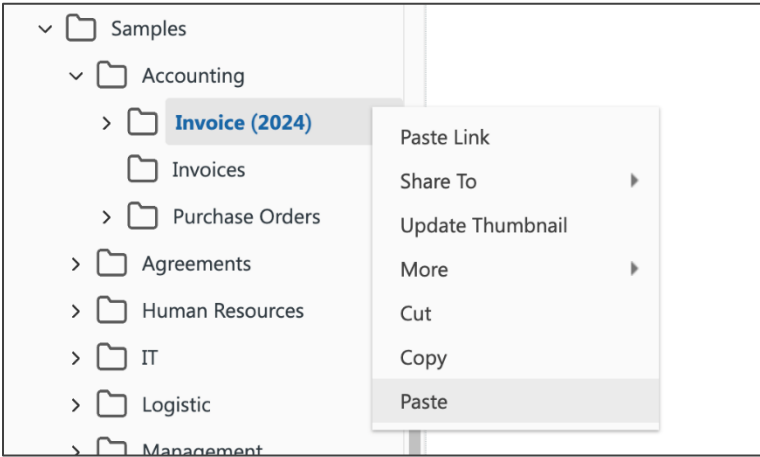
4. Click the blue Upload button to commit changes.

XII. Copy Document

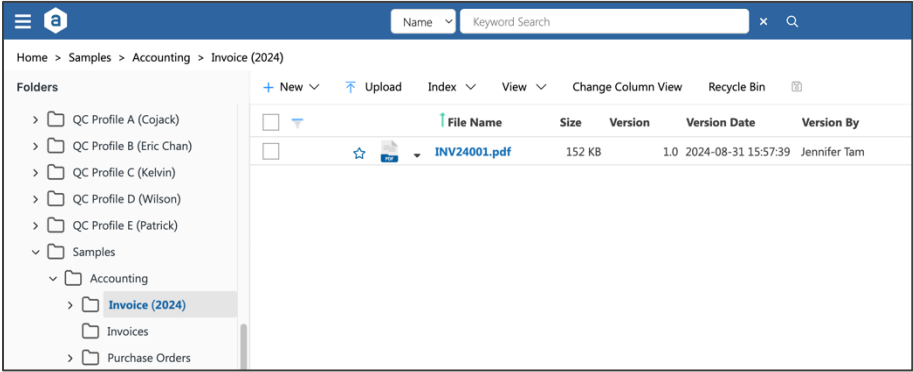
1. To copy a document, select the document from the document list, right click to bring up the context menu, select Copy.



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

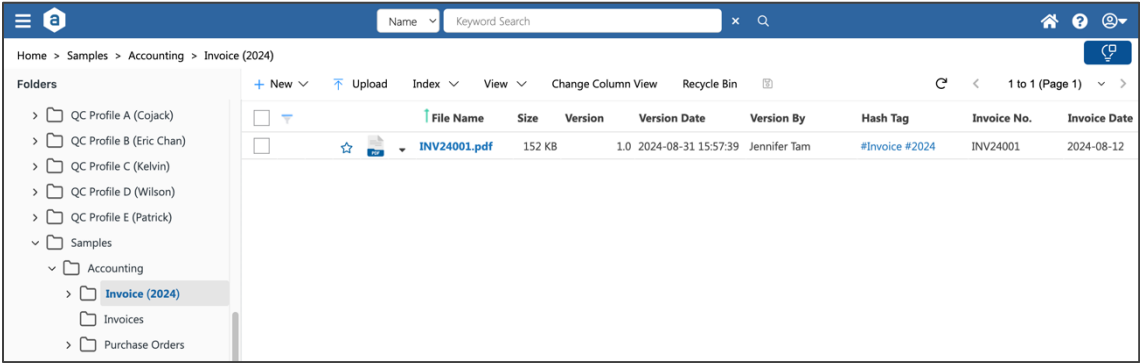


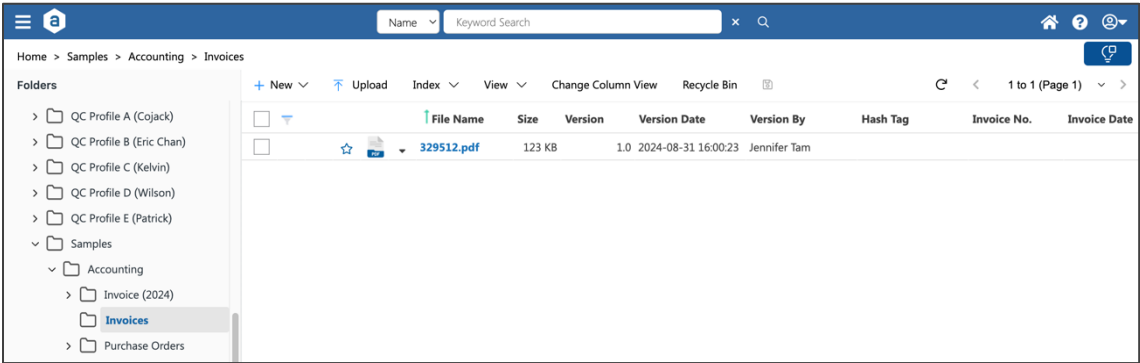
3. Both the document and index are pasted in the destination folder. Be notice that only the latest version will be copied and pasted.



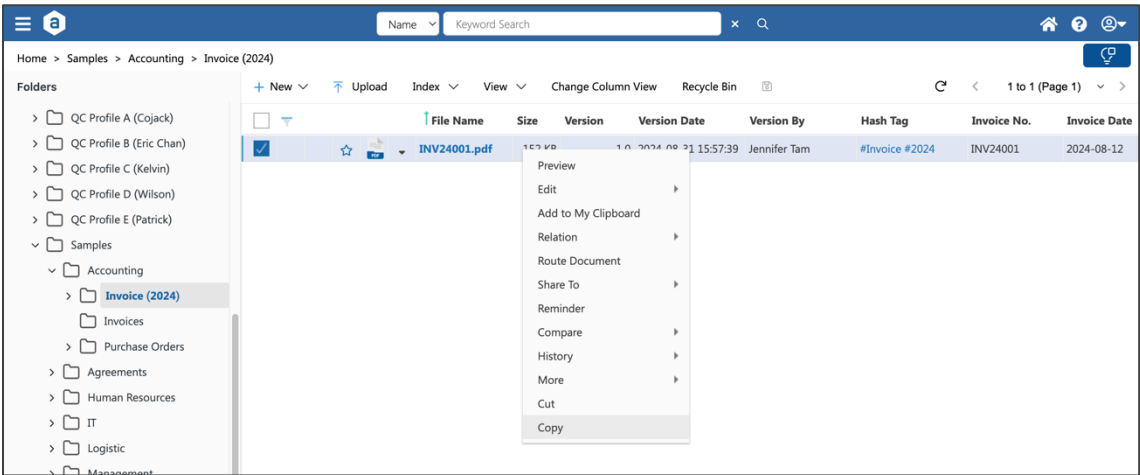
XIII.Copy and Paste Index

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.

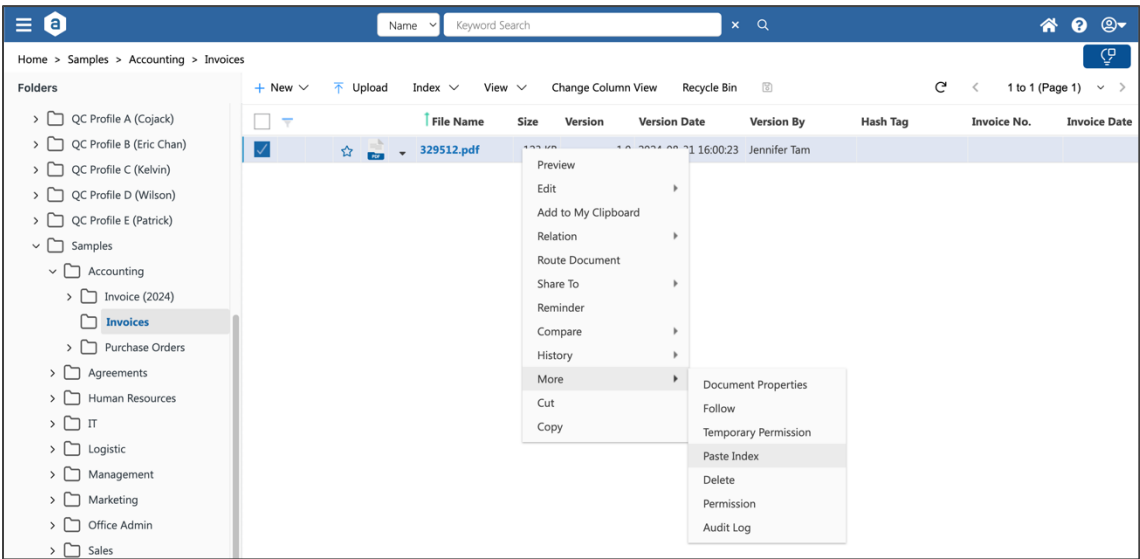




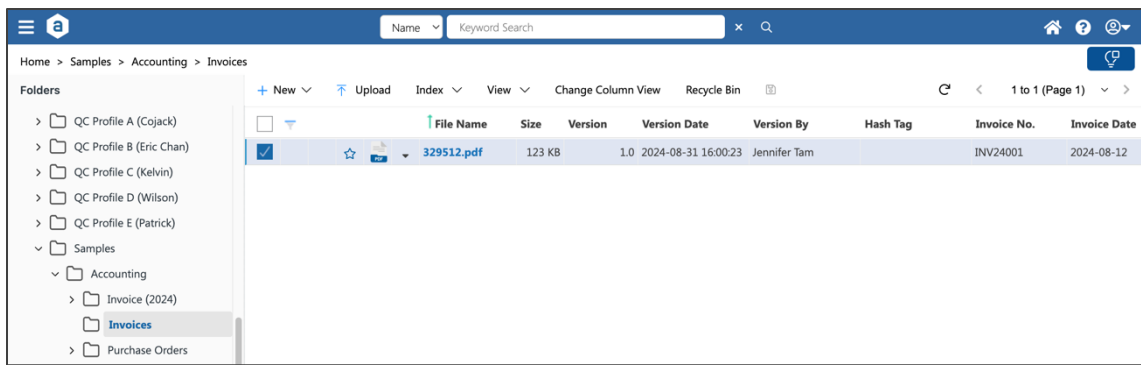
2. Copy the source document.



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

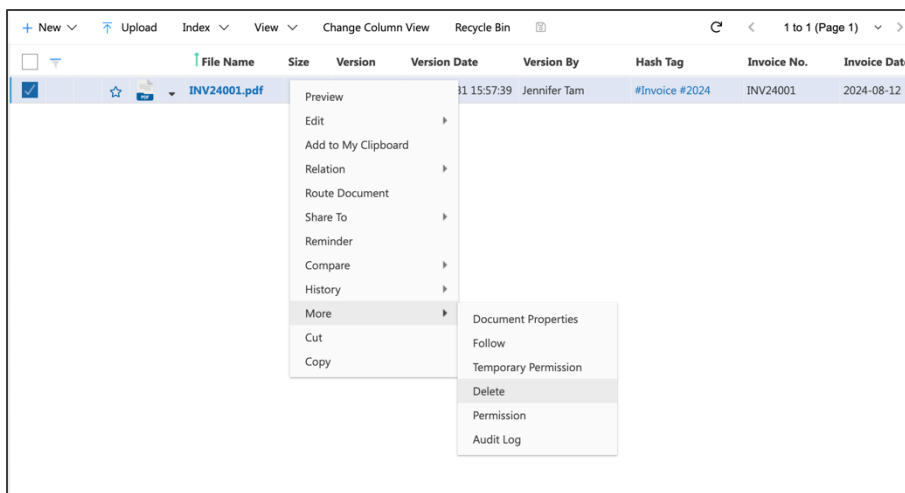


- The destination document is now indexed with the original one.



XIV. Delete Document

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



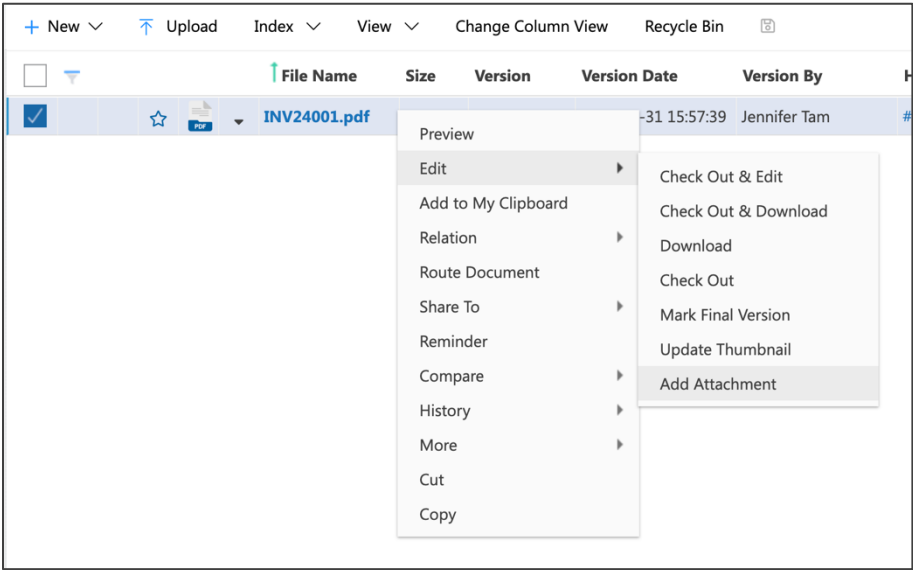
- A confirmation message will ask you for deleting. Choose Yes. The document will be put into Recycle Bin.

XV. Move Document

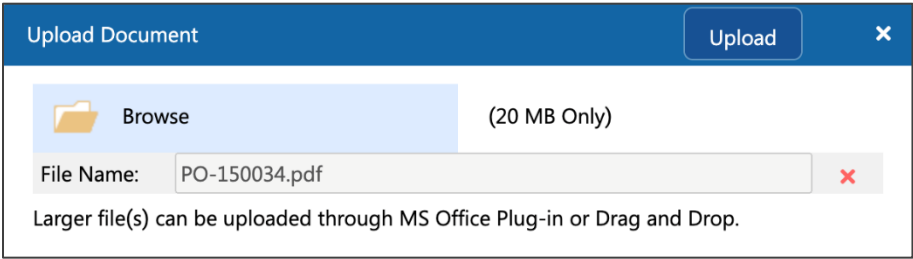
- To move a document, drag and drop the document(s) from one folder to another. Bear in mind that you cannot drag either folder or document to the root (e.g. Home).
- If the document profile between the source and destination folders are difference, some document index may not be able to inherit.

XVI. Add Attachment

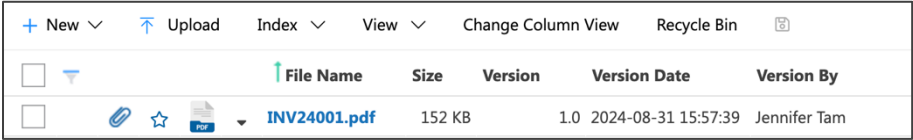
- To add an attachment, select the document, right-click to bring up the context menu, and then select Edit > Add Attachment.



2. Browse the file to upload.

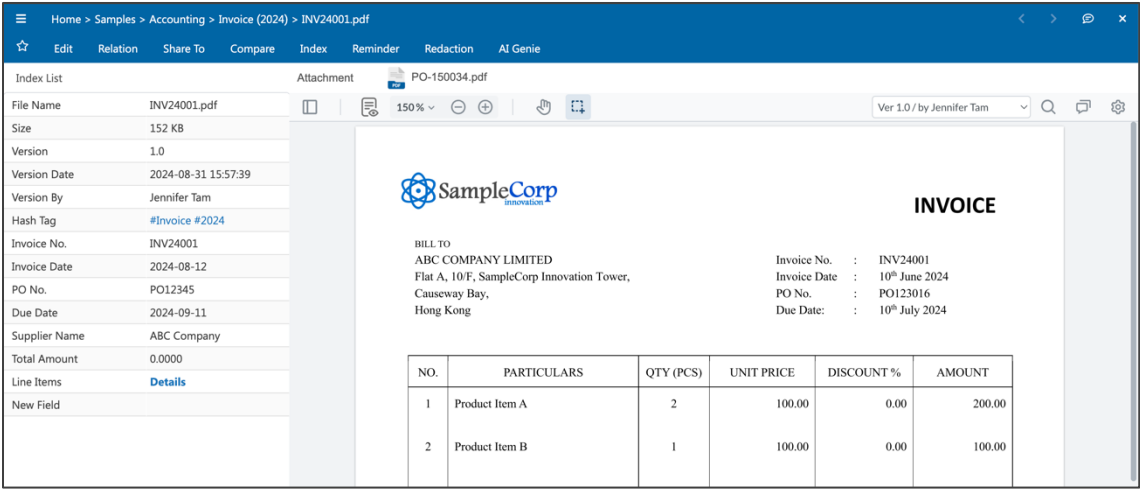


3. A clip icon will appear in the document. You can add multiple attachments to a single document.

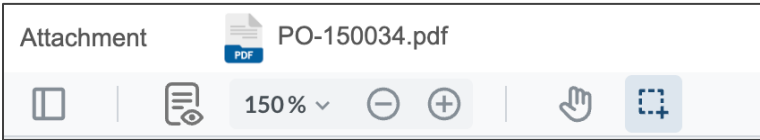


XVII. View Attachment

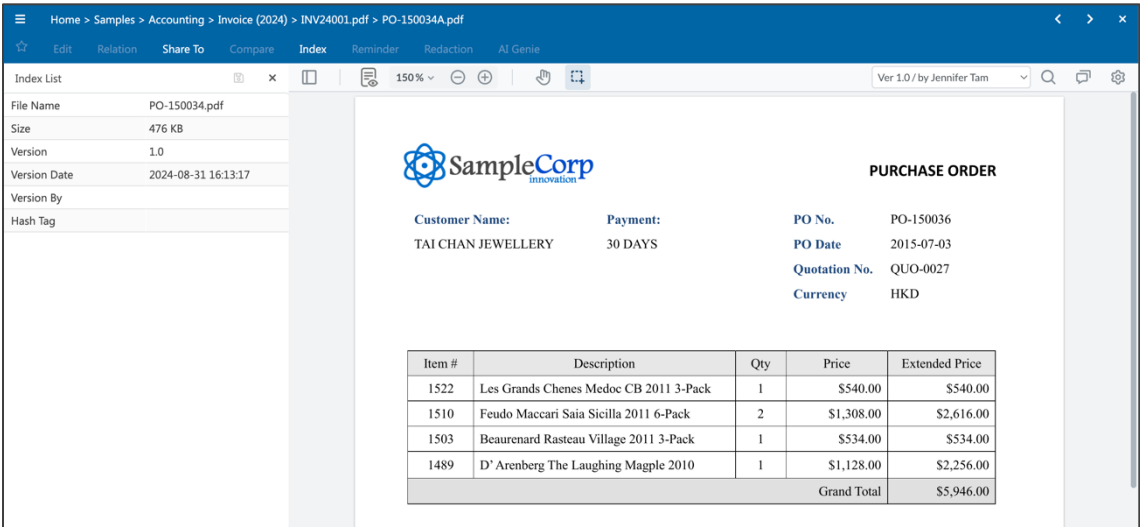
- 1. To view the attachment, open the document for preview.



- 2. The attachment is display above the annotation toolbar.



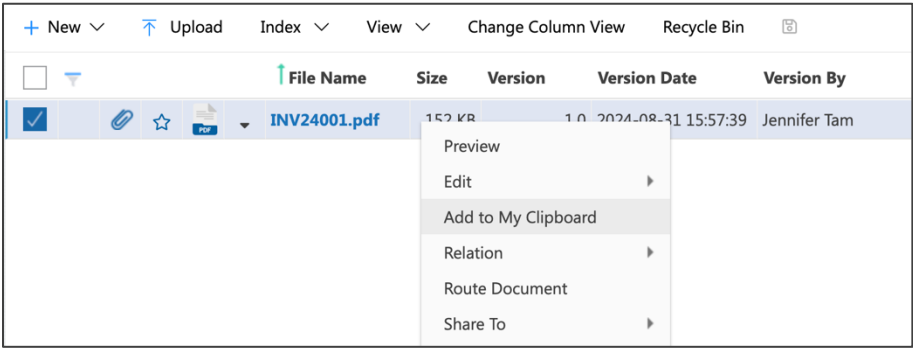
- 3. Click the attachment name to open for preview.



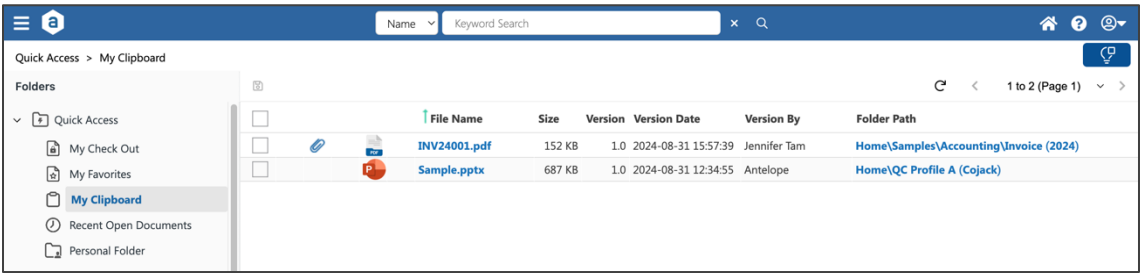
Note: You can only share and rename attachment.

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.