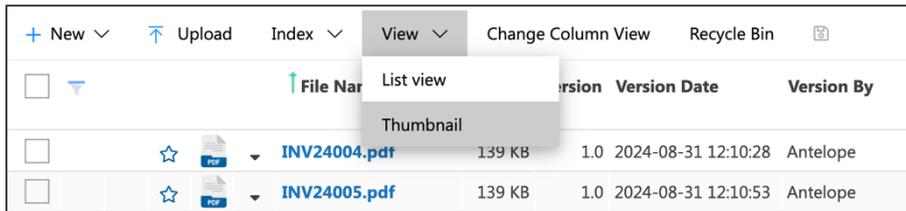


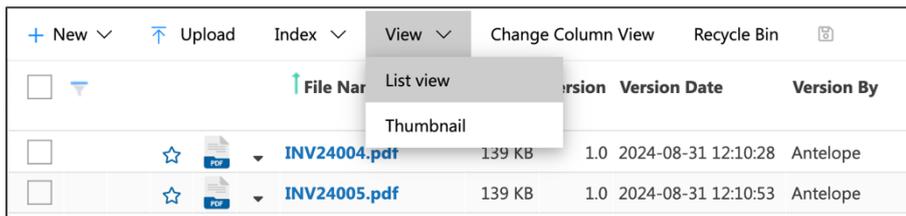
M. Document List

I. Document List and Thumbnail View

1. The document list shows the name, properties and index fields.
2. To change into thumbnail view, from the document list toolbar, click View > Thumbnail.

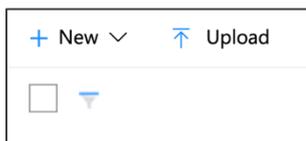


3. The documents are shown in thumbnail.
4. To change back to document list view, from the document list toolbar, click View > List View.



II. Column Filter

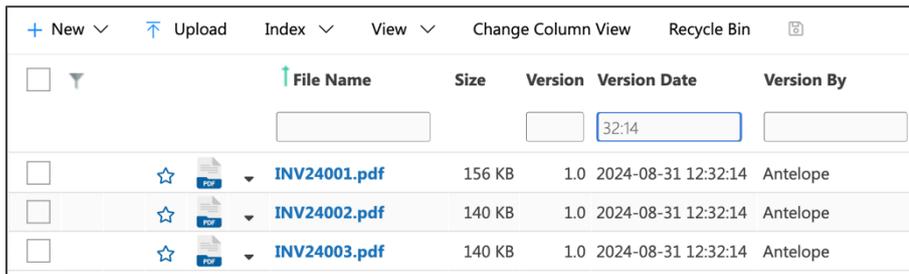
1. Apart from document full-text search and advanced search, you can also perform a quick searching using column filter.
2. From the document list, click the icon.



3. The column filter will appear.



4. Input the text which appears in the below document grid which you want to filter out.

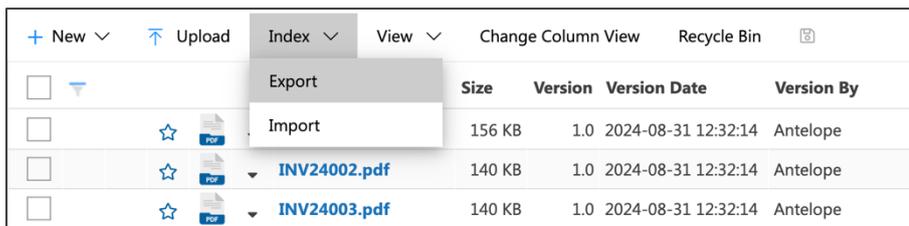


5. The following data type cannot be searched by column filter: Hashtag, Details Line Items, Date Range (e.g. 2024-08-12 to 2024-08-30).

III. Export List

1. You can export the document list into .xlsx format.

2. From the document list toolbar, click Index > Export.



3. The document list is exported as "export.xlsx"

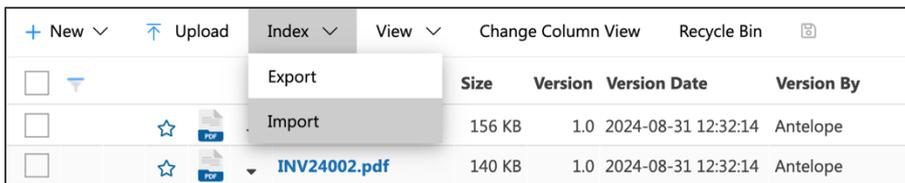
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ID	File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2	2737	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
3	2735	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
4	2736	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
5	2739	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
6	2738	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
7	2740	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
8	2743	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
9	2741	INV24008.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
10	2742	INV24009.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
11	2744	INV24010.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details
12	2745	INV24011.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details

IV. Import List

1. You can modify the “export.xlsx” and import to the document list for purpose of batch indexing.
2. Modify the data you wish to import, remember when you modify the cell value, you must follow the data type. For example, you cannot input numeric value in “Date” type, or input a date in “Numeric” type.

ID	File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2737	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	#ABC	INV24001	12/8/2024	PO12345	11/9/2024	ABC Company	13560	Details
2735	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	#DEF	INV24002	13/8/2024	PO12346	12/9/2024	DEF Company	12304	Details
2736	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
2739	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2738	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2740	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2743	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details

3. From the document list toolbar, select Index > Import.



4. The document list is indexed automatically.

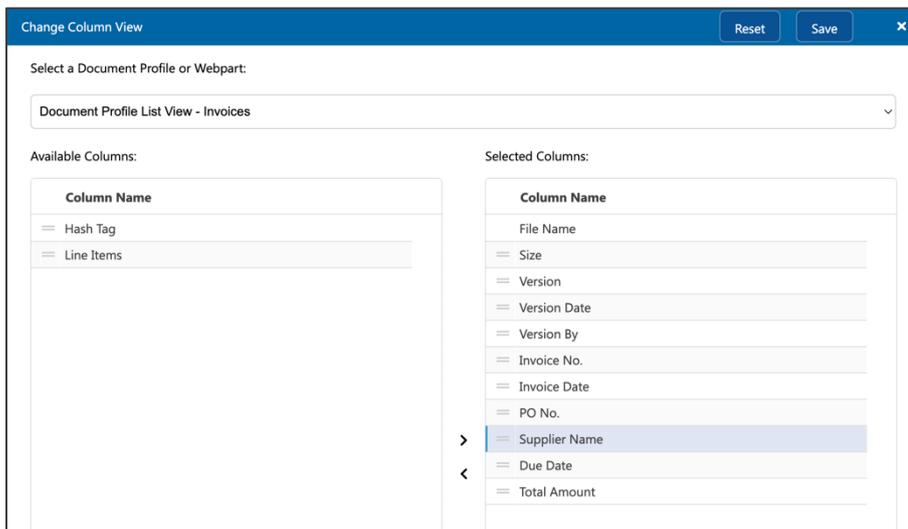
File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.
INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	#ABC	INV24001	2024-08-12	PO12345
INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	#DEF	INV24002	2024-08-13	PO12346
INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope				
INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope				

V. Change Column View

1. You can change the sequence of column or hide any column of the specific folder by “Change Column View”. From the document list toolbar, click the “Change Column View” button.

File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.
INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	#ABC	INV24001
INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	#DEF	INV24002
INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope		

2. Select those columns on the right-hand side that you don’t want to display in document list, and click the < icon.



3. Drag and drop the column up and down to re-order their position.



4. Click the blue “Save” button to commit changes.
5. The document list columns will re-order for the selected folder of your own user account according to your setting.

		File Name	Size	Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name	PO No.
<input type="checkbox"/>		INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company	PO12345
<input type="checkbox"/>		INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company	PO12346
<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				

6. If you want to reset your adjustment to factory setting, click the blue “Reset” button.



7. Pay attention that since you have customized the folder display setting, in case your system administrator has added a new index field, your folder document list will not reflect this new setting until you make another “Reset” or “Configuration” of your column view.

