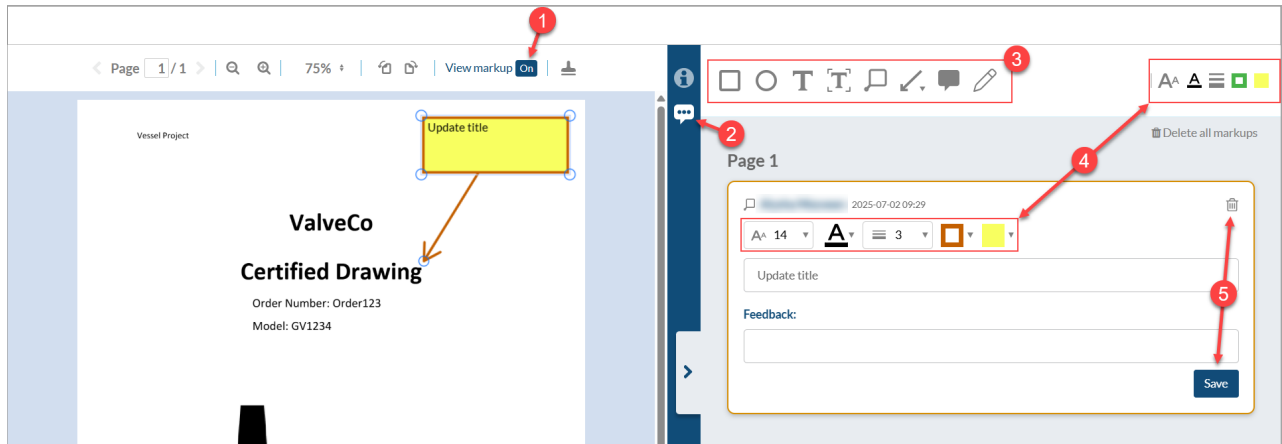# Markups on documents

07/02/2025 11:35 am MDT

DocBoss supports viewing and adding document markup. Annotations can be viewed on the the assign screen, and can be added in the assign pop up and/or from the outstanding actions interface.

You can add markups to files when you upload them to DocBoss. These consist of annotations and comments.

1. Assign a file to a card and once loaded, click the "View markup" box to enable the markup interface

2. Click the text box icon to open the markups screen.

3. Click to select a markup style and click on the document to create the annotation.

4. Once the annotation is placed, it can updated as needed (see details below).

5. To save the annotation, click "Save". To delete it, click the garbage can.

Viewer navigation

- Scroll (vertical) via mouse scroll
- Zoom via **CTRL+mouse scroll** (or use drop-down on top)
- Pan via **SHIFT+mouse scroll** (horizontal scroll)
- **CTRL+0** to return to 100% zoom
- Grab tool allows user to move file in viewer.
- Full screen available by hiding the side panel, or**CTRL+M**

Markups (details)

- Markup types are **Rectangle, Circle, Text**, **Text box**, **Callout**, **Line/Arrow**, **Sticky note,** and **Pencil**
- Once placed on the file, the annotation can be moved/resized, and the properties (e.g., line width/color, fill color, text size/color, etc.) can be adjusted
- For markup types that allow text, the text can either be entered directly on the markup, or can be added in the description box in the properties panel
- Colleagues can add feedback. This will be added as**Reply** text in pdf outputs. The feedback will be displayed alongside the annotation in the final PDF output, and will also be available internally when reviewing the file.

Note: The markup panel icon will display as empty 🗨 if there is no markup on the file, and with dots ⬚ if/when markups are added.

History screen

All comments and markup information is displayed below the view in the history screen (below the file). Note that when clicking **Compare** on the assign/viewer screen, a history view screen will open showing the appropriate data. It is now also possible to view comment files also (if pdf).

Terms:

Annotation: The vector graphic drawn on the file.

Markup: The annotation plus associated text and feedback.

Feedback: Text added by users (inside a markup) which will appear as a reply in PDF output. It will be linked to the markup. This may be useful replying to customer annotations when uploaded to DocBoss.
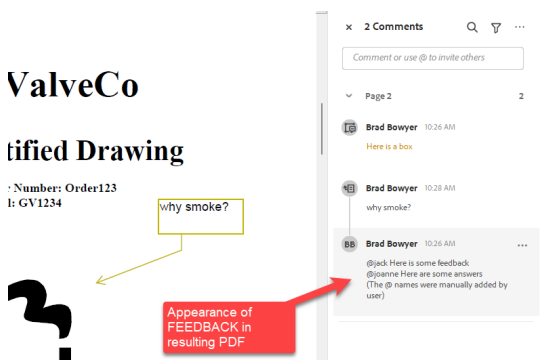
Comment: Reserved for text added at the *card level*. This text is entered on the **Info** tab. Comments can also be uploaded as a file. Markup is the term for annotations and text applied directly into the file.

Summary of Markups

To include a summary page of all markups made in DocBoss, enable the option on project main (Project Menu > Set Up > Main). The position of the summary page can also be adjusted.

Upon submittal of the document, the summary page will be added. The summary page will look similar to this:

Include markups in compilations

For the Compilation, you have the option to include markups (only) or include markups AND the comments page. By default, it will not include either. *Note: The "Add Markups Page to Documents(s)" option will not be visible unless the "Include Markups" option is checked.*