Markups on documents

03/03/2025 10:08 am MST

DocBoss supports viewing and adding document markup. The assign screen, the assign pop up, and the outstanding actions interface all support annotations.

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

1. Turn viewer on

2. Markups are only available in the full viewer

3. Click the box to enable the markup interface

4. Click and drag on the document to create the annotation. Note that the box is the only annotation style available. The color is specific for each user. The color is designated on the user profile.

5. Enter a comment if desired.

6. To save your comment, click the checkbox. To delete the entire annotation, click the garbage can. To simply escape without a comment (but leave the annotation) click the x.

Viewer functions

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**
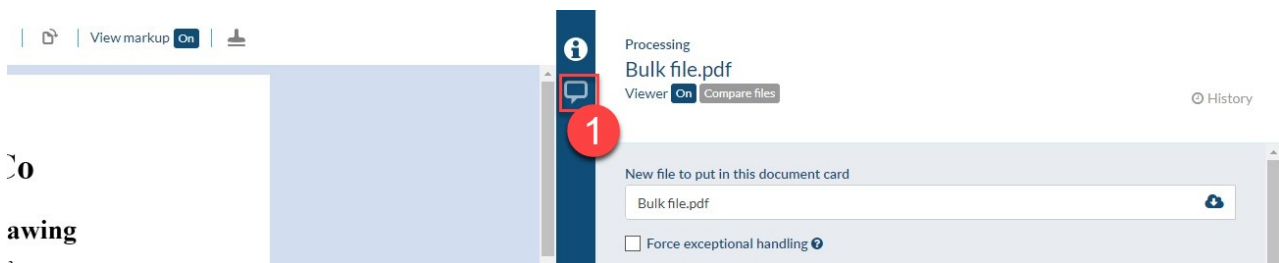
Markups

- Markup types are **Rectangle**, **Text**, **Text box**, **Callout**, **Line/Arrow**, **Sticky note,** and **Pencil***
- Change properties of the annotations one placed on screen (line width/color, text size/color)
- Move/resize annotations
- Colleagues can add feedback. This will be added as **Reply** text in pdf outputs. The feedback is a single text box.

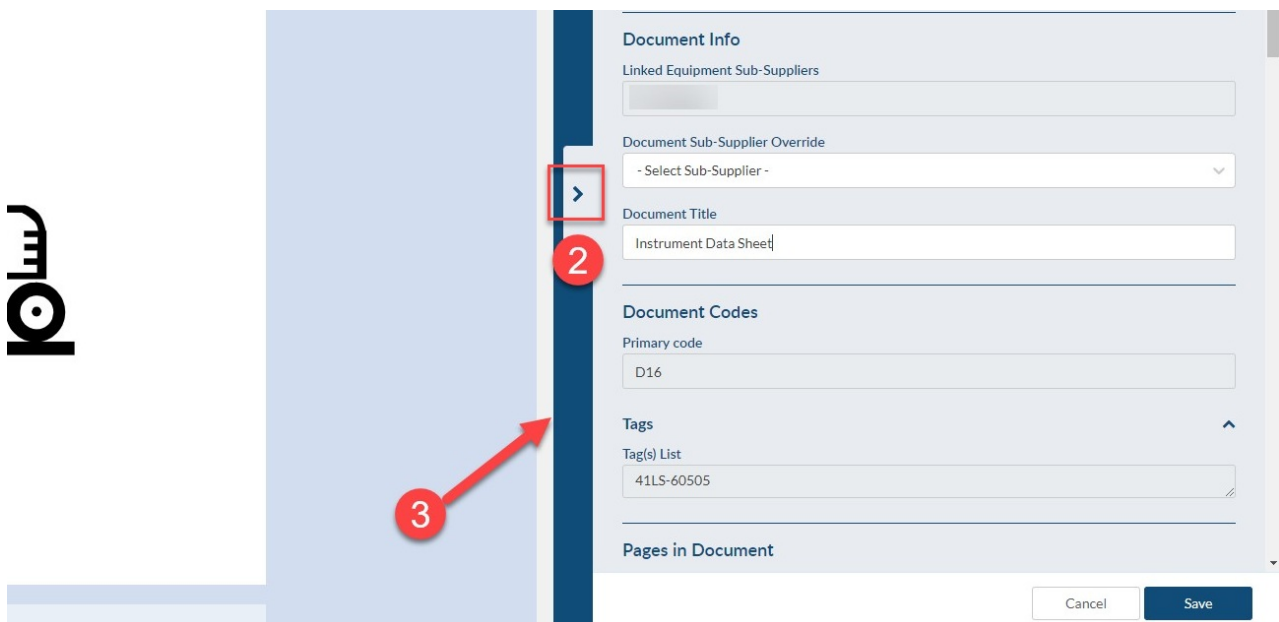**Pencil markups available as of Spring 2025.*

Working with side panel (display info or markup tab)
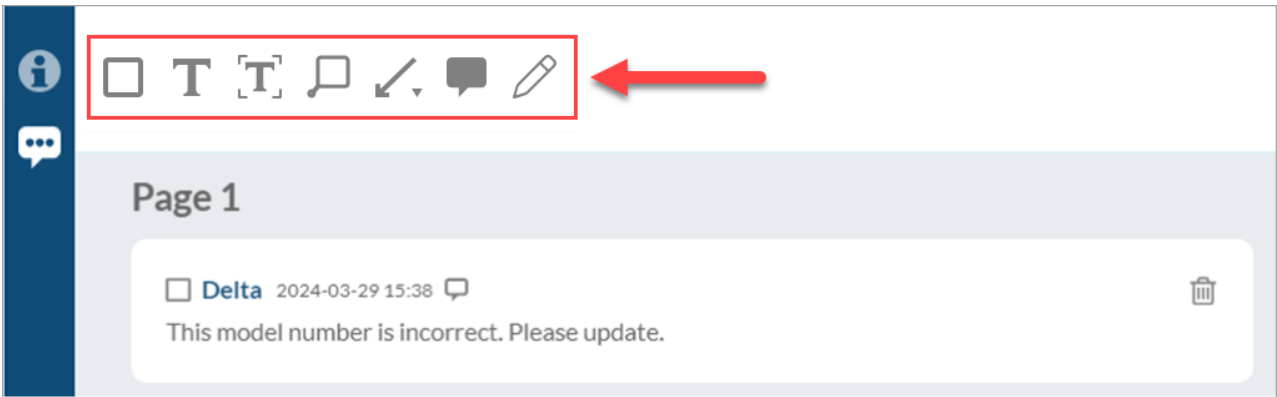
1. Click the markup icon in the side panel margin.

2. To hide/show full screen, click the arrow, or type **CTRL+M**.
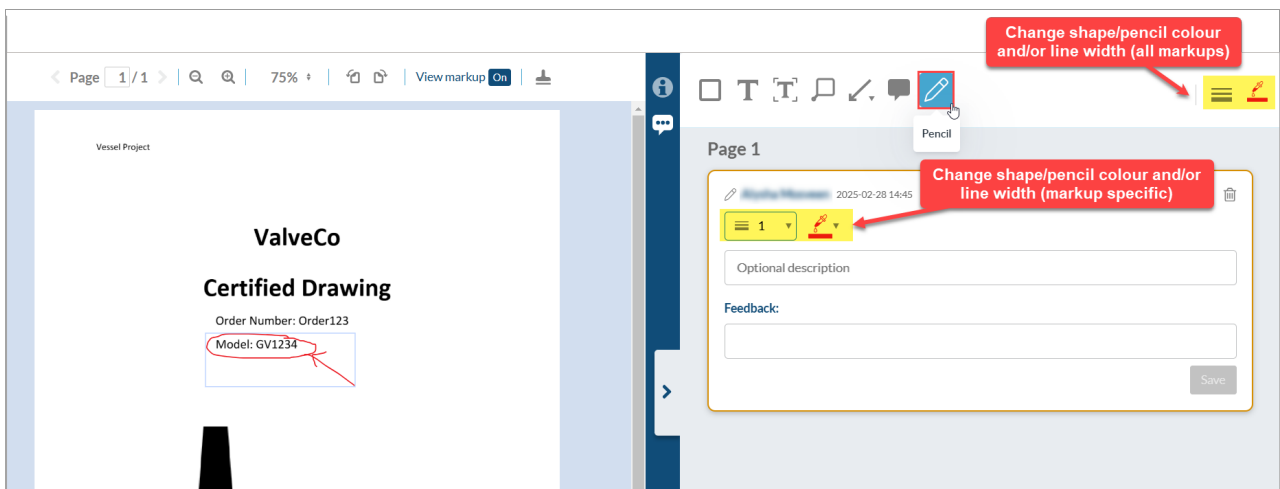
3. Change width of side panel.


Adding markups

1. To add markup, select the required tool from the options at the top of the markup panel.

2. In the viewer, click on the preferred location to add the annotation (shapes/text), and/or draw on the page(s) as required (pencil).

3. If using a callout box, enter text into the box (3A). After leaving the annotation (click anywhere on file), a markup reference box will appear in the side panel. For text-based markups, the same text will appear in the description box (3B).
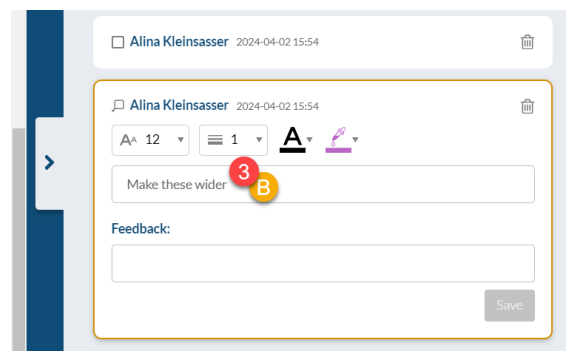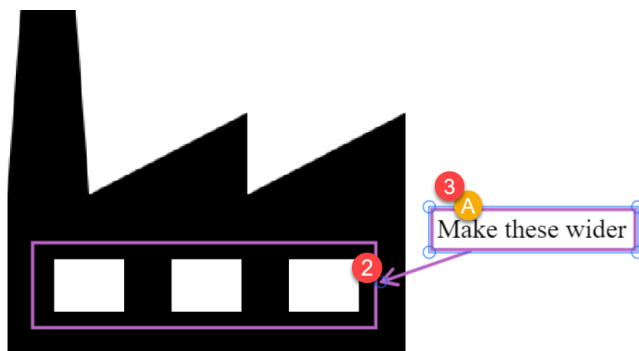
4. If desired, any user can add feedback. This will be displayed alongside the annotation in the final PDF output, and also available internally when looking at the file.

Feedback:

Save

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Here is a box
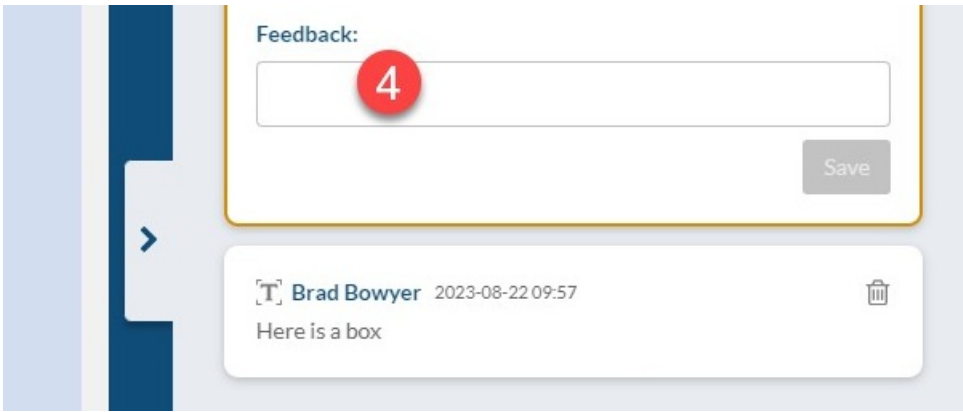
5. To zoom, users can use **CTRL+mouse scroll** or change zoom level at top. **CTRL+0** resets to 100%.

< Page 1 /5 > | Q Q | 150% ↕ | ⇨ | View markup On | ⬆
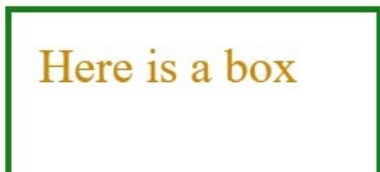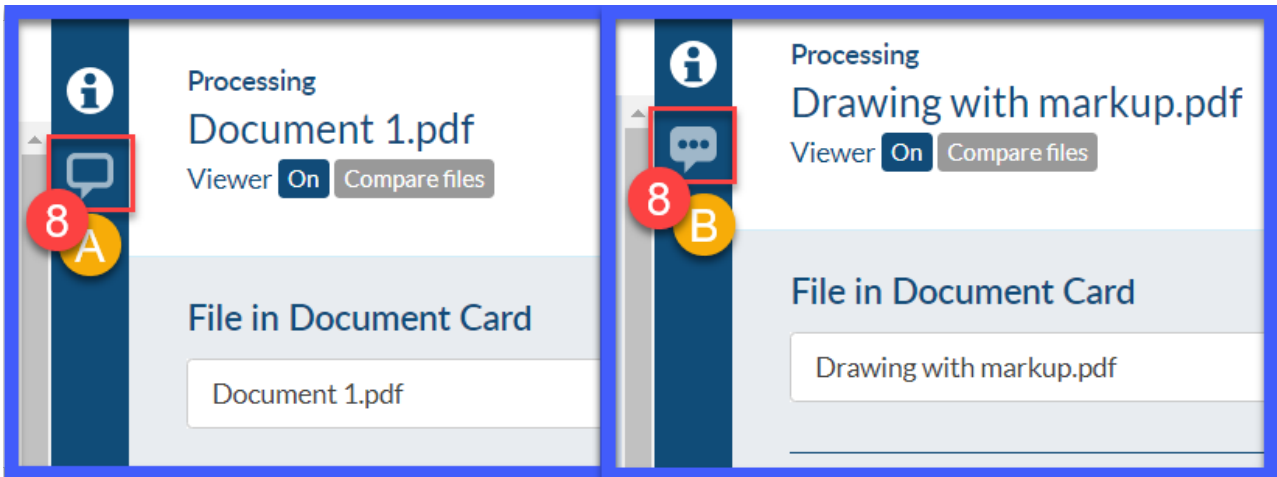
Here is a box ValveCo

6. Pan horizontally using scroll bar, **SHIFT+mouse scroll**, or grab tool.

7. Other markup is shown in reduced view while the current one is being edited.

Order Number: Order123
Model: GV1234

T̲ Brad Bowyer 2023-08-22 09:57
Here is a box
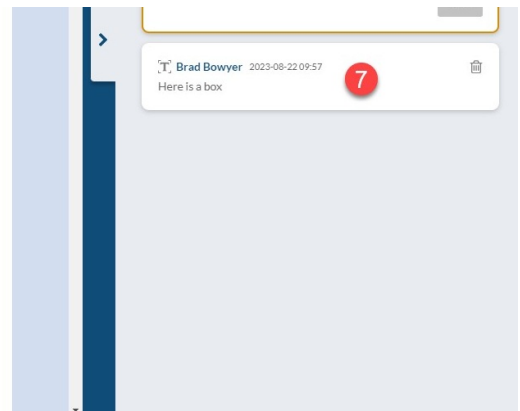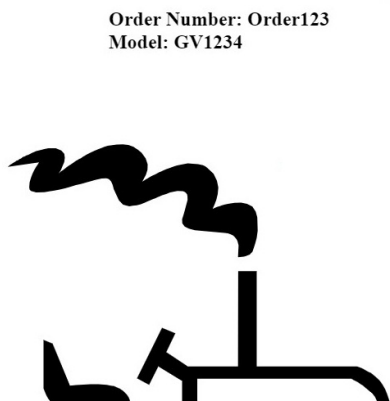
8. The markup panel icon will display as empty if there is no markup on the file (8A), and with dots if there is (8B).

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, we will now open a history view screen to show 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 with 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.
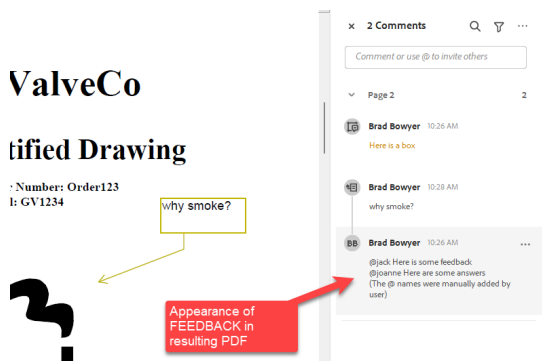
Comment: Reserved for text added at the *card level*. This text is entered on the **Info** tab. Comments can also be uploaded as a file. Markup is the term for annotations and text applied directly into the file.

Summary of Markups

To include a Summary page of all markups made in DocBoss you will need to enable this feature on the Main page of your project.
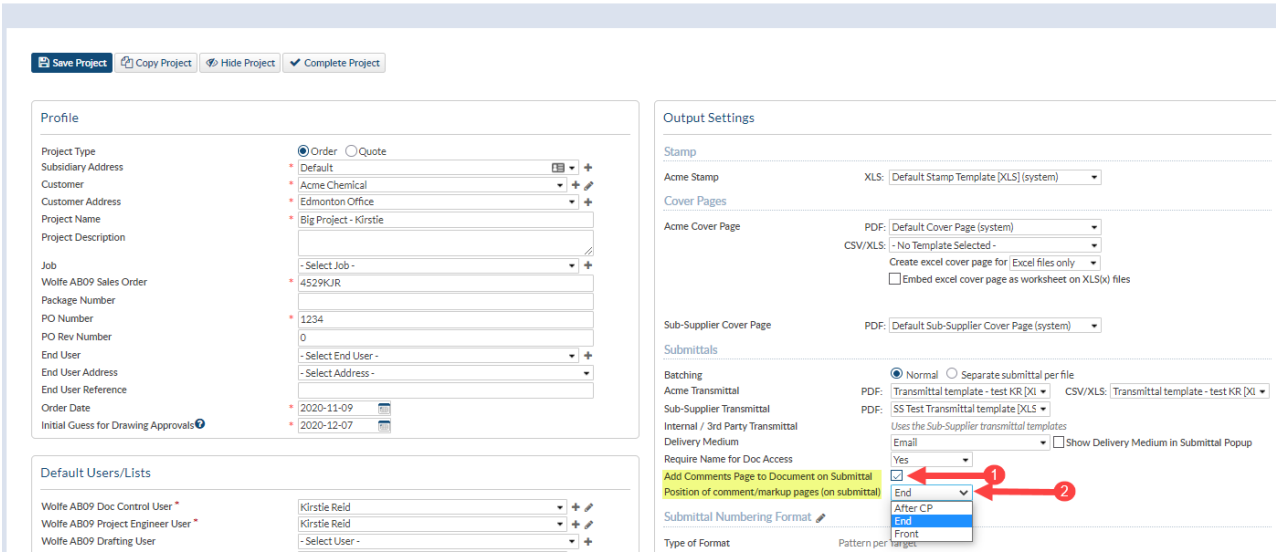
1. Check the box to Add comments page to document on submittal

2. Choose the position of the comments page. Options are to include After the cover page, at the End of the PDF or at the Front (before the cover page)

Upon submittal of the document, the summary page will be added.

The summary page will look similar to this:
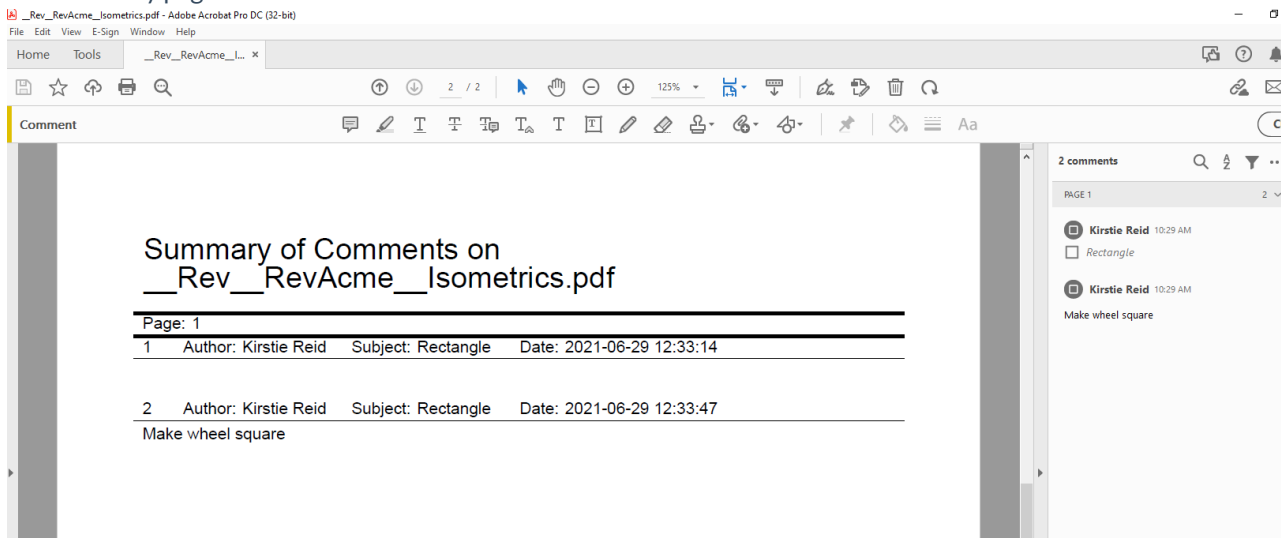
Include markups in compilations

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. You will not see the Add Comments Page option unless the Include Markups is checked.

Index Reports & Compilations
Edit Compilation

Save Compilation (local only)

Compilation Info

Name:*   MRB

Description:

File Type: PDF

Cover Pages: Ensure every doc has cover page

☑ Respect cover page suppression for each card

☑ Include Markups   ☐ Add Comments Page to Document(s)

☐ Regenerate ENTIRE Compilation during submittal process