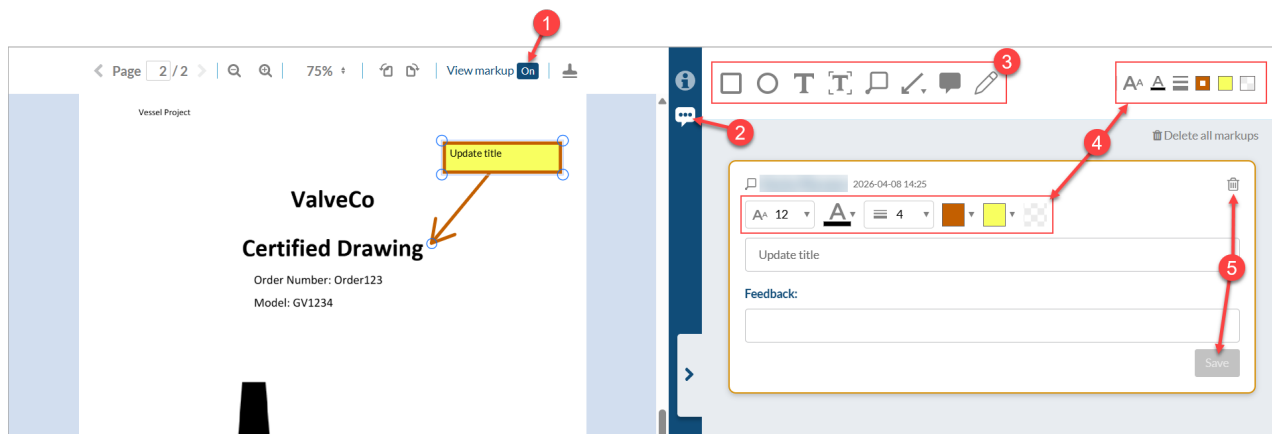


# Markups on documents

04/08/2026 3:33 pm 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 (text size/color, line width/color, fill color/opacity) 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

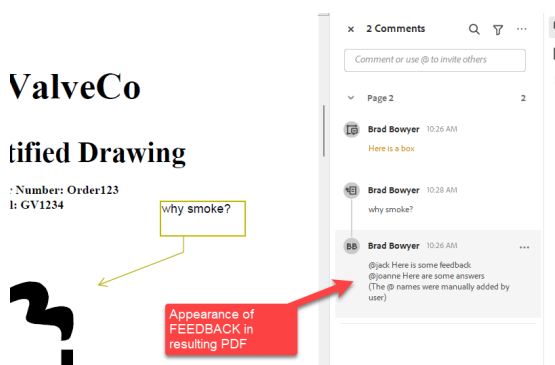
All comments and markup information is displayed below the view in the history screen (below the file). Note that when clicking **Compare** on the assign/viewer screen, a history view screen will open showing the appropriate data. It is now also possible to view comment files also (if pdf).

## 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.

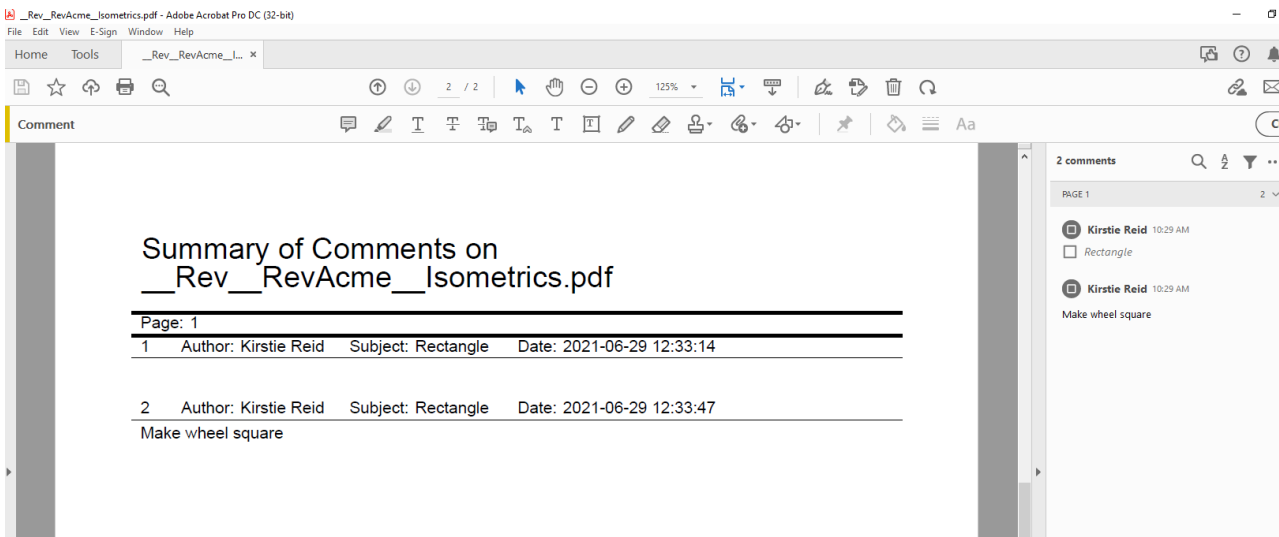
## Summary of Markups

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.

Set Up Main Collapse All Expand All

|                                |                  |   |                  |
|--------------------------------|------------------|---|------------------|
| Users and Key Contacts         | ▼                | Submittal Defaults  | ✕ ✕              |
| Turn Around Days               | Using defaults ▼ | Numbering   | Using defaults ▼ |
| Document Auto-Numbering Format | Using defaults ▼ | File Naming Pattern   | Using defaults ▼ |
| Document Revision Settings     | Using defaults ▼ | Headers and Footers   | Using defaults ▼ |
| Prices and Estimates           | Using defaults ▼ | Markup Output   | Using defaults ▲ |
| Other Data                     | ✕ ✕              | <input checked="" type="checkbox"/> Add markup summary page(s) to documents (on submittal)<br><input checked="" type="checkbox"/> Include markups as shown in viewer (on submittal)<br>Position of markup summary page(s)<br><input type="text" value="End"/> |                  |
| Other Data                     | ▼                | Batching, Downloads and Medium  | Using defaults ▼ |
| Custom Fields                  | ▼                | Incoming  | ▼                |

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.*

Compilation Info

Name:

Description:

File Type:

Cover Pages:

Respect cover page suppression for each card

Include Markups  Add Markups Page to Document(s)

Add Comment Page to Document(s)

Regenerate ENTIRE Compilation during submittal process

