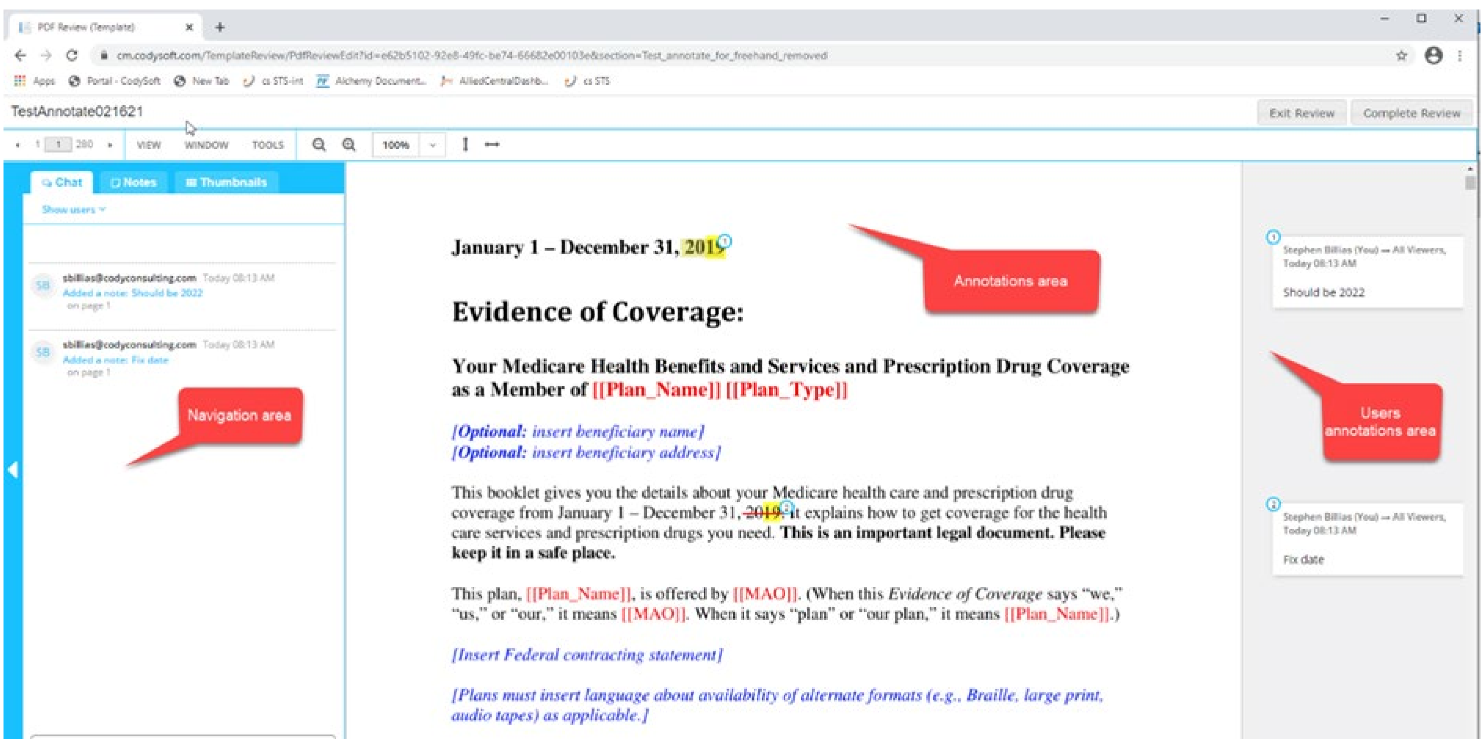
PDF Markup Tool Quick Start Guide

Contents

Main Screen

The PDF Markup tool is an easy-to-use editor that provides document reviewers with a simple interface to make edits:



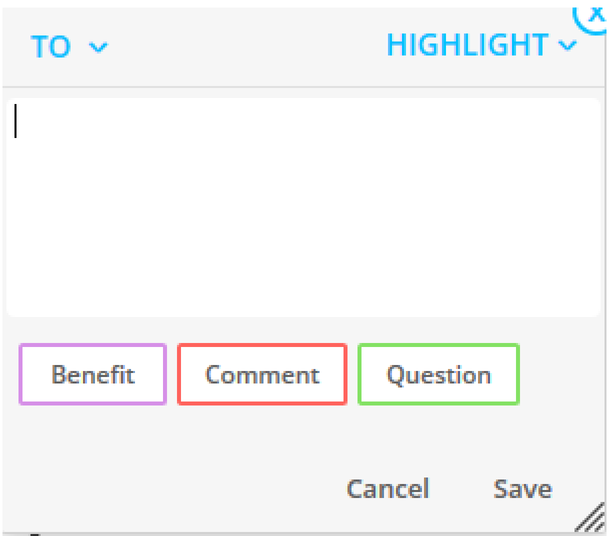
The screen is divided into three main areas:

- **Annotations area** – The center area where you add annotations
- **Users Annotations section** – On the right, where all annotations made to the document are listed.
- **Navigation area** – On the left, available by clicking the arrow to expand it, where you can navigate through the document, filter the annotations, chat with other reviewers, and export your annotations.

Annotations Area

Adding an edit or comment is as easy as clicking in the annotations area.

1. Click, or click and drag to identify a section where you want to make an annotation. As soon as you click, the annotations dialog box displays:

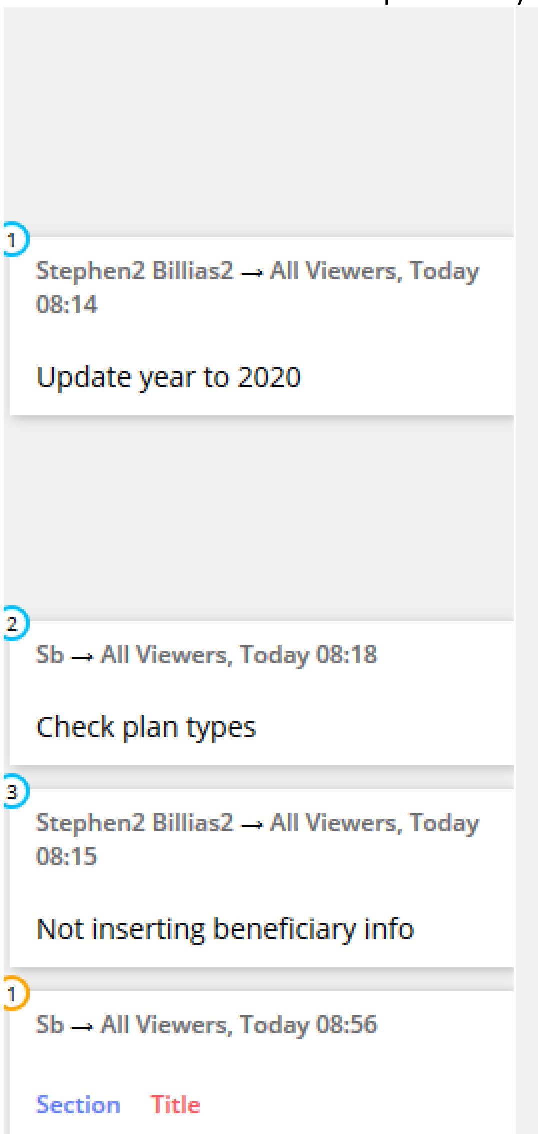


2. Click the HIGHLIGHT dropdown to change the annotation type. The dropdown list displays the choices for annotation type:
   - **Highlight**—marks the text with highlight
   - **Underline**—marks the text as underlined
   - **Insert**—allows you to insert text in the annotation
   - **Strikethrough**—marks the text as strikethrough
   - **Edit**—copies the selected text into the annotation for editing
   - **Mark section**—to mark an entire section for annotation.
3. Enter text in the text box that describes the annotation, for example “Check plan types” or “Update contract year.”
4. Click the TO dropdown in the upper left of the dialog box to select whether to make the annotation visible just for yourself or for all users assigned to the review.
5. Optionally select one of the tags to enable you and other reviewers to narrow the annotations to a subset, for example, Benefits questions. Your system administrator sets up the appropriate tags for your use. Highlight color is based on the tag type:
   - Benefits in purple
   - Comments in red
   - Questions in green
6. Click **Save** to save your annotation or click Cancel to cancel your annotation.

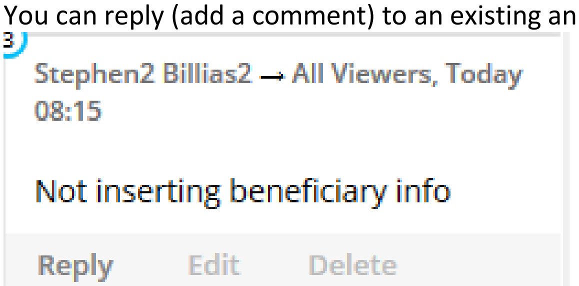
The tool uses your last selection of annotation type for the next annotation. You can change the type when you make the next annotation.

Users Annotations Area

The Users Annotations area keeps track of your annotations and those of others:



If more than one person is reviewing the same document, their annotations appear in real time while you are in the review. You can reply (add a comment) to an existing annotation in the document, and edit an annotation you have made:

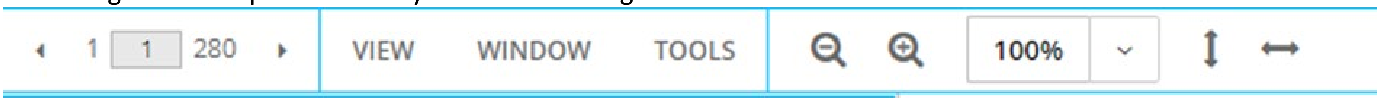


NOTE: You can only delete annotations you have made, not the annotations of others.

Navigation area

Navigation

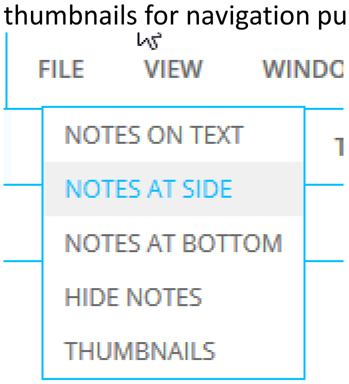
The Navigation area provides many tools for working in the review:



In the upper left of the Navigation area you can page through the file using the left and right arrows or enter a page number to jump to that page. Several menu choices provide additional functionality.

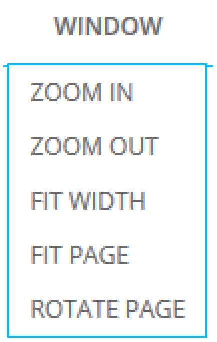
View menu

From the View menu you can choose where to show the Notes, or to hide them, and you can also access a view of all pages as thumbnails for navigation purposes.



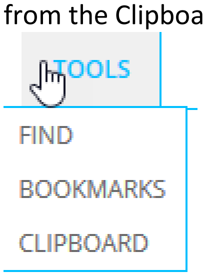
Window menu

From the Window menu you can change your view of the annotations by zooming in or out or setting the view to fit the width or the page size or rotate the page view.



Tools menu

From the Tools menu you can use the Find functionality to search the document, locate Word bookmarks, or bring in material from the Clipboard.



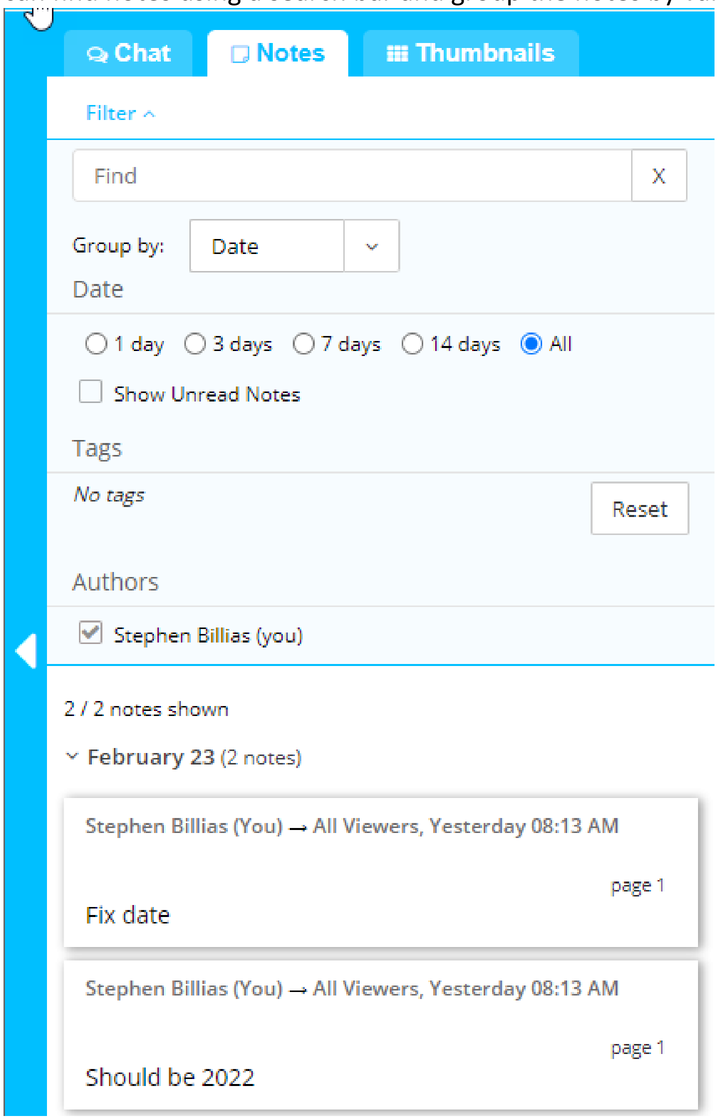
Chat

The Chat choice enables you to chat with other users who are on the review. This feature is useful for real time conversation about a document. Chats are not saved in the Markup tool.

CollateralManagement module®

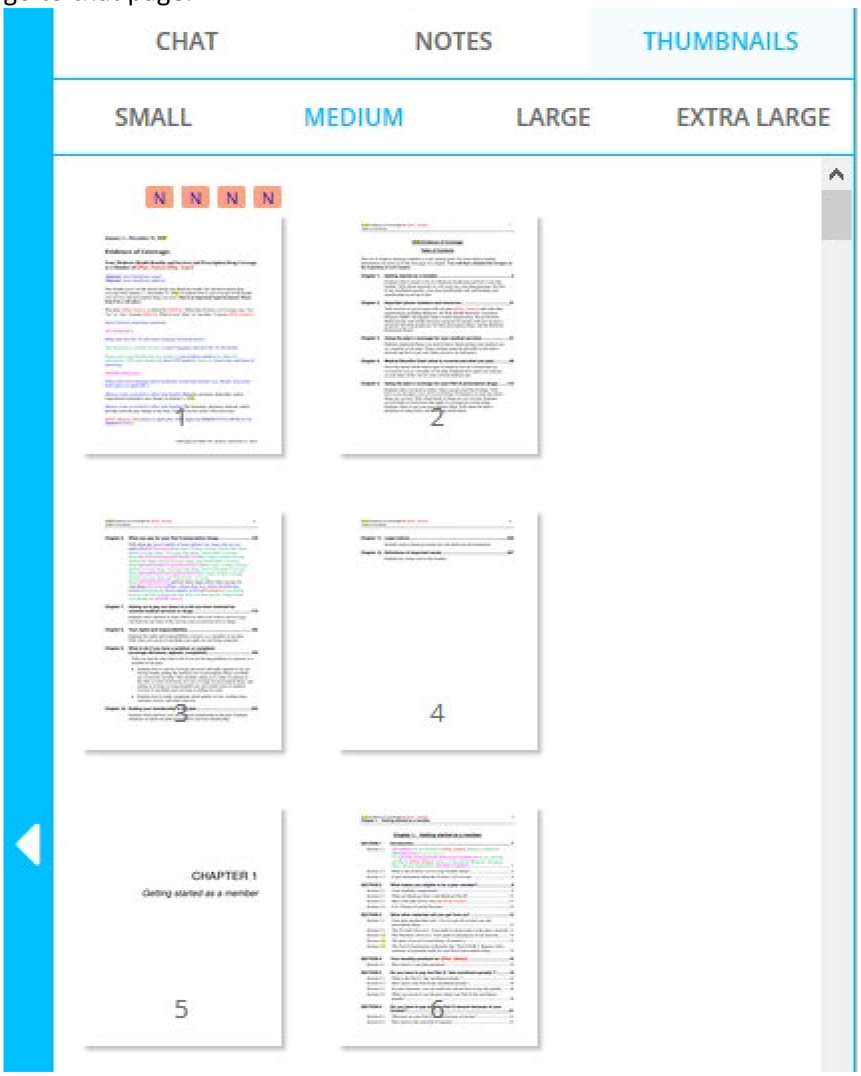
Notes

The Notes choice gives you the opportunity to Filter the list of annotations by date, by tags, and by authors of annotations. You can find notes using a search bar and group the notes by various elements also.



Thumbnails

The Thumbnails choice allows you to view the pages of the document as thumbnails in a variety of sizes. Click any thumbnail to go to that page.



Sizing icons

The review space provides these additional navigation tools:

- The plus or minus looking-glass icons increase or decrease the display of the annotations area.
- The sizing dropdown 100% gives you a set of choices for resizing the annotations area
- The vertical double-arrow positions the entire annotations area vertically as a single page
- The horizontal double-arrow positions the entire annotations area horizontally as a single page

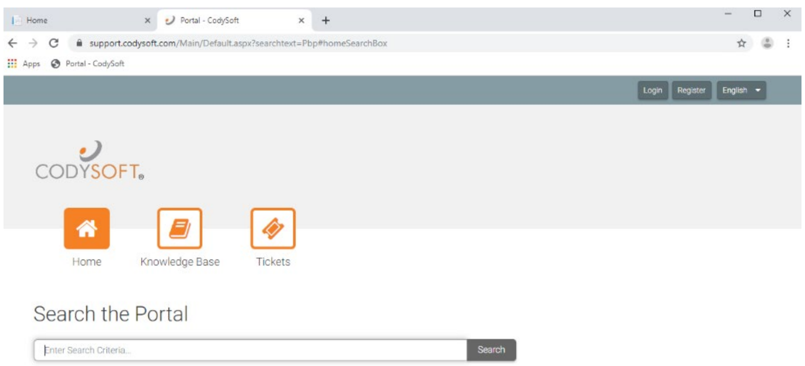
Complete review

Click **Exit Review** to leave the review without completing it. All changes you have made during the review session are saved automatically. When you have made all annotations and added all comments to other reviewers' annotations, click **Complete Review** to end your review.

Support

In the Support Portal, CodySoft® provides several ways to get more information about how to use the CodySoft product.

1. From any screen in CodySoft, click **Help** in the upper right corner of the screen to enter the Support Portal. The Support Portal home screen displays:



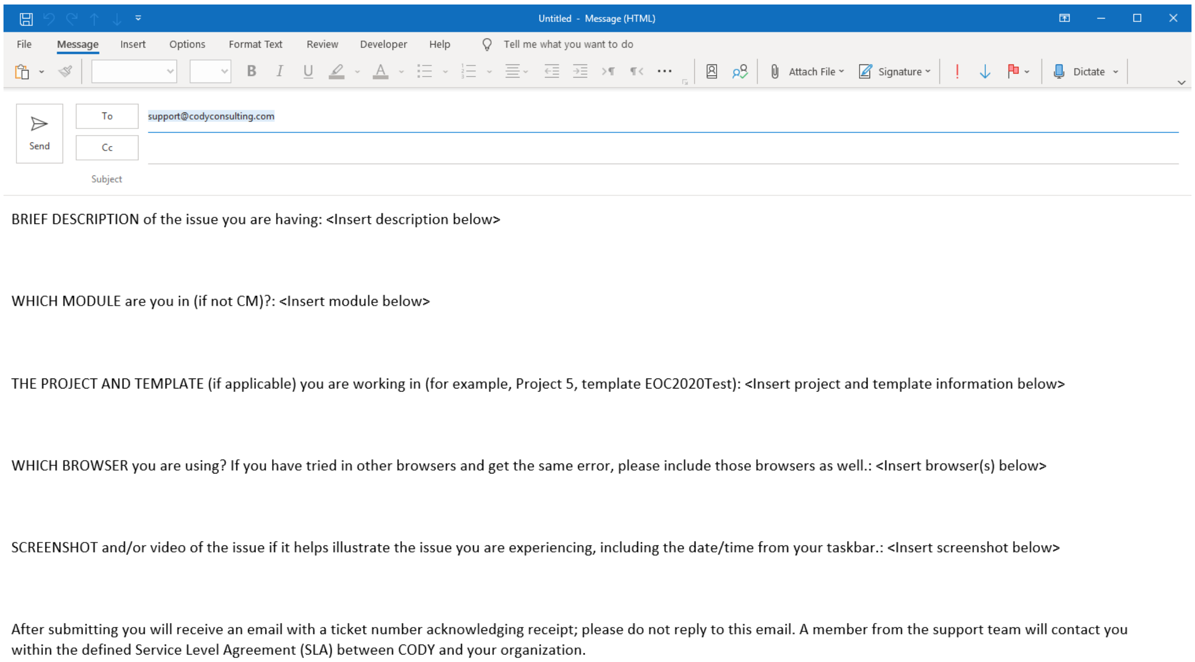
2. From the Support Portal home screen you have three choices:
    a. Knowledge Base
    b. Tickets
    c. Search the Portal

Using the Knowledge Base

1. Click **Knowledge Base** to enter the Knowledge Base
    a. Enter a Search term
    b. Click Search to look for topics related to your search criteria. The system displays a list of relevant Knowledge Base topics.
    c. The Knowledge Base choice provides links to user guide documents on many CODY modules, including a set of videos on how to accomplish basic CodySoft Collateral Management (CM) tasks

Open a Ticket

1. Click **Tickets** to enter a new support ticket:
2. Click **Start Ticket**. An email opens addressed to Cody Support:



3. Fill out the email, providing as much information as possible for each requested item:
    a. Description
    b. Module
    c. Project/Template
    d. Browser
    e. Attached screenshot or video
4. Click **Send.** After you submit the email you will receive an email with a ticket number acknowledging receipt; please do not reply to this email. A member from the support team will contact you within the defined Service Level Agreement (SLA) between CODY and your organization.

Search the Portal

You can search the Support portal, including the Knowledge Base for information.

1. Enter search criteria, for example "PBP."
2. Click **Search**. Any items related to your search appear below the Search bar, with live links to the information.

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