VirtualViewer® HTML 5 user functionality and interface guide

This guide describes the available functionality and features in VirtualViewer® HTML5. The major functional areas of VirtualViewer HTML5 for Java are:

- The **Image Controls Toolbar**, which runs along the top of the screen.
- The **Annotation Toolbar**, which runs along the left side of the screen.
- The **Pages and Documents Panel** on the right side of the screen, which shows the thumbnails for the current image and for all the documents made available by multiple documents mode.

This guide also includes information about mobile device interactions.

IMPORTANT NOTICE:

This guide provides instructions for the major areas of VirtualViewer user functionality. Your system administrators may have removed and/or hidden large portions of functionality in order to meet the specific needs of your organization.

This guide should therefore not be considered to be or distributed as a general or public "user guide," so as to avoid end-user confusion given the variety of possible VirtualViewer environments.

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The Image Controls Toolbar

The section describes the Image Controls Toolbar that runs along the top of the VirtualViewer HTML5 for Java screen.

Upload Document

Load Local Files with **Upload Document** button. Follow the steps below to use the load local files feature:

1. Select the **Upload Document** button.
2. In the Upload Document dialog, select the **Choose File** button.
3. Select the file that you would like to open. The file name displays in the Upload Document dialog.
4. Select the **OK** button.
5. A copy of the file is uploaded to the server and is automatically placed in your Sample Documents folder to use in VirtualViewer.

Export Document

To export a document, select the Export Document button . The Export Document function allows regular and virtual documents to be exported.

Exporting a Document with Annotations

The Export dialog box contains the "Include Annotations" checkbox to select the option to export a document with annotations.

Annotations will only be included when the "Include Annotations" checkbox is selected. The default is set to include annotations when exporting.

When exporting with annotations, only the visible layers are included. When the "Include Annotations" checkbox is selected, the option to export the file as Original will be disabled. The "Include Annotations" checkbox is only supported when either the PDF or TIFF format is checked. To export the file as Original, un-check "Include Annotations" to enable and make available the option for Original.

Select the **Export** button to export.

Emailing a Document

You can email a document directly from VirtualViewer HTML5.

1. To email a document, select the **Email** button .

2. The Email Document dialog box appears. Select the options that you want for your email.

3. In the **From:** field, enter the email address of the sender.

4. In the **To**: field, enter the email address where you are sending the document.

5. In the **Subject**: field, enter the subject for your email. In the **body** field, enter the text of the email.

6. In the **Format** section, select PDF, TIFF or Original for the file format. In the **Annotations** section, select any of the following check boxes:

7. Include Annotations Check to include annotations.

8. Select **Send** to send the email.

Printing

To print, select the **Print** button .

The Print dialog box appears. Select the options that you want for your print job. The "Save As PDF" option was removed because it has become a redundant feature that is now handled with the "Export" feature.

Printing with or without Annotations

The print dialog box contains the Include Annotations checkbox to select the option to print with or without annotations. Annotations will only be included when the "Included Annotations" checkbox is selected. The default is set to not include annotations when printing. When printing with annotations, only the visible layers are included.

Zooming

To zoom, select one of the **Zooming Controls** buttons:

- Zoom In
- Zoom Out

Rubber Band Zoom

To use rubber band zoom, select the Rubber Band Zoom button and then drag your mouse to select the area that you want to zoom in on.

Magnifier

To magnify an area of a document, select the **Magifier** .

When the Magnifier is launched, it appears on the screen based on the default coordinates defined in config.js.

Once the Magnifier is displayed, it can be selected and moved just like any annotation.

The Magnifier size does not scale with changes to the zoom level of the page and maintains its dimensions as the page zooms, but the zoom will scale as a factor of the magnifier zoom level and the page zoom level.

The ability to resize the Magnifier window vertically or horizontally using the mouse was added. To resize, grab the bottom left corner (a little black triangle) of the box. The magnifier will not magnify annotations. The original magnifier size is defined in Config.js.

Page Controls

To move from page to page, select one of **Page Controls** buttons. The available Page Controls buttons are:

- First Page
- Previous Page

- Next Page ▶
- Last Page ▶|

Fit-to-Page

To fit the document to the page, select one of the **Fit-to Controls** buttons. The available Fit-to Controls buttons are:

- Fit-to-page
- Fit-to-width
- Fit-to-height

Continuous Scrolling

The thumbnail panel scrolls as you scroll the document in the image panel. The page in the image panel that has greater than 50% of the available screen is reflected as the active thumbnail.

As you scroll through the document pages, the viewer automatically highlights the border of the thumbnails after the page has changed. The page number changes to reflect the page selected in the thumbnail.

Any page level calls are applied to the active page. For example, if you select to rotate, only the active page is rotated.

Any zoom level functions are applied to the entire document. For example, if you select, fit-to-page, every page in the document displays as fit-to-page.

Continuous scroll facilitates searching. The found words can be highlighted in all the pages of the document.

Picture Controls

To adjust image properties (picture controls), select the Picture Controls button .

Once the Picture Controls button is selected, VirtualViewer HTML5 for Java displays the Picture Controls window, in which you can adjust the Brightness, Contrast, and Gamma by sliding the control bar to increase or decrease the brightness, contrast, and gamma.

Picture Controls are measured on a range of -125 to 125.

Changes made to the Picture Controls properties are page specific and only applied to the page actively in focus.

Changes made to the Picture Controls properties will be seen in the viewer, in near real time, as the adjustments are made.

Crop Page Selection

You can draw a crop rectangle on a page and crop out to remove the rest of the page. The remaining area is deleted from the page and can be saved out using save as or export.

To crop a page, select the **Crop Page Selection** button. With the **Crop Page Selection** button, draw a rectangle to select the area that you want to crop from the page. Select **OK** to confirm the area to crop. The area outside the selection is deleted from the page. Select **Cancel** to cancel the selection. Select **Save** to save the cropped area

> **Note**: Crop Page will not retain any annotations or pre-burned redactions.

When entering crop preview mode, cropping will remove all annotations from your page. In order to save the crop, either use export or save as to send it to a new document or save to overwrite the file.

If you crop within a cropped page, the original crop will be backed out. You cannot crop a cropped area. You have to save the original cropped page to crop again.

Annotations are not supported on cropped pages. If you try to annotate on a crop preview page, you will see an error message and not be able to annotate the page. You can annotate after saving the cropped page.

The Annotation Toolbar

This section describes the Annotation Toolbar that runs along the left side of the screen for VirtualViewer HTML5 for Java.

Creating Annotations

To create annotations, click on the annotation to select it and then click and drag your mouse on the document. Release the mouse when you are done drawing the annotation. The available annotation buttons are: sticky note, text edit, image rubber stamp, highlight rectangle, redaction area, line, arrow, freehand, filled rectangle, filled ellipse, filled polygon, rectangle, ellipse, and polygon.

> **Note**: Annotations are now supported on the iPhone and iPad platforms.

To display a contextual annotation box, click on the annotation and then left-click. The contextual annotation box allows you to:

- Select a color to fill in the annotation.

- Select a line color.

- Adjust the line size for a line annotation.

- Edit the text for a text annotation.

Editing a Filled Annotation

To select the fill color for a filled annotation, right-click on the annotation. In the contextual annotation box, select the **Fill Color**.

To display more fill colors, select the color in the **Fill Color** field. The Fill Color box expands to display more colors to select from a range of stock colors or your own custom color(s).

In the **Custom:** field, you can enter a customized color code as the Red Green Blue (RGB) color code. For example, for the color red, enter the customized RGB color code of "FE0000".

Editing a Line Annotation

To adjust the line color in a line annotation, right-click on the annotation. In the contextual annotation box, select a **line color**.

To adjust the line size, right-click on the line annotation. In the contextual annotation box, select the **line size** from the available line weights of 1 to 9.

Copying and Pasting an Annotation

Follow the steps below to copy and paste annotations:

1. Right-click on an annotation.
2. From the dialog box, select the **Copy** or the **Cut** button.
3. Right-click on the page where you would like to paste the annotation. Select **Paste**.
4. The annotation is pasted on the page.

Editing a Sticky Note Annotation

Select the Sticky Note text annotation button .

Right-click on the text annotation to open the annotation contextual box. Enter text in the text area in the **Edit Text** field.

To adjust the text color in a text annotation, select a **Text Color**. In the **Custom:** field, you can enter a customized color code. In the **Font** field, select the font that you would like for the text. In the **Font Size** drop down box, select the font size for the text.

Select the **Bold** checkbox for bold text. Select the **Italic** checkbox for Italic text.

Formatting changes are reflected in this text box as well as the text on the annotation. Select the **Save** button to save any text edit changes.

Using Text Edit Annotations

A Text Edit annotation allows you to type a text annotation on a document. Select the **Text Edit** annotation button T .

Type the text in the Text Edit annotation box. Select the checkmark to save the text annotation. Select the X to close the Text Edit annotation box.

You can dynamically resize text annotations. The text annotation box expands horizontally as you type from left to right.

The text annotation automatically resizes to fit the initial text when it is created.

The text annotation extends the right edge of the annotation edit box as you type.

The text annotation is resized vertically and does not extend beyond the bottom of the page.

The horizontal resizing ends at the end of the page.

Search Annotation Text

To search annotation text, select the **Annotation Search** button in the Search tab in the Thumbnail panel. Enter the text that you are searching for in the Search field and select enter. The annotation text is highlighted for the term that you searched.

Annotation Commenting

Annotation commenting allows you to add user comments to an annotation object. This allows multiple users to collaborate on a single annotation object. To use annotation commenting, follow the steps described in the scenarios below:

- User 1 creates an annotation or rubber stamp and saves and closes the document.
- User 2 loads the document and right-clicks on the annotation or rubber stamp. The user selects the Notes button. The user enters text in the note field and selects Add Annotation Note. The note is displayed with the date and time that it was created.

- User 3 follows the same steps as User 2. Each additional user can add comments.

To delete a note, select the x at the upper right of the note.

Please note that Annotation commenting is display only. Export, Send, Email and Print will not display the annotation comments on the pages.

Resizing an Annotation

To resize an annotation, click on it until it is highlighted and selection squares display on each of the annotation's corners. Drag one of the selection squares, except for the top left one, to resize the annotation to the desired size. The following is the expected behavior for the highlighted annotation and selection squares:

Select the **top left selection square** to drag the annotation to a new location. Dragging on other non-selection square areas of the annotation sets the upper left selection square under the mouse pointer.

Select any of the **other selection squares** other than the top left one to resize the annotation.

Annotation Indicators and Navigation

The annotation indicators and navigation buttons allow you to navigate through a document showing only the annotated pages.

Click the **Toggle Annotation Navigation** button (the grey checkmark on top right corner of the Pages panel) to display the Annotation panel.

The Annotation panel shows the **Previous Annotation Page** button, the **Next Annotation Page** button, and the **Filter** button.

Use the **Next Annotation Page** button and the **Previous Annotation Page** button to navigate from annotated page to annotated page skipping pages with no annotations.

Select the **Filter** button to clear the pages view in the thumbnail panel and only display pages that contain an annotation.

The Annotation Indicator icon displays as a red check in the upper right corner of a page with an annotation.

Saving Annotations

To save annotations, select the **Save Document** button. 🖫

Deleting Annotations

To delete an annotation, right-click on the annotation to display the contextual annotation box.

In the Delete Annotation? box, select the **Delete** button to delete the annotation.

Revision history for Annotation Create Date/Time

Revision history is saved for all annotations.

For example, if a user creates a sticky note on page 1 of a document, the userId/date/time are recorded. If another use comes in and edits that same sticky note (color, size, placement, etc.) the userId/date/time is updated in a scrolling list to reflect the edit to that object.

This history applies to all annotations, image stamps and redactions, including:

- Resizing/moving records as a change
- Changing text records as a change
- Page manipulations or moving pages with annotations to a new/other document will not record a change
- The use of pages with annotations in a VD will record changes to the annotations
- A modification will be added if the annotation is modified and then saved.
- If the user changes the color, moves around the annotation, and expands the annotation, and then saves once, only one modification item will be saved.
- If an annotation is pasted, it will have a clean slate--it won't keep the modifications of the original.
- If a document is saved-as, the annotations on the new document will still have a

modification trail but will not add a new modification for the saving event.

DISPLAY AND USE

The revision history is displayed in the annotation popup by clicking the **Expand** (») button:

It may be hidden again by clicking the same button («).

Annotation Information

To display the User Name, Date and Time of an annotation, right-click on any annotation in VirtualViewer. The annotation creator's user name and the date and time that the annotation was created will be displayed at the bottom of the annotation window.

Using Image Rubber Stamp Annotations

An Image Rubber Stamp is an image annotation from a pre-defined list. Your system administrator has the ability to define a list of pre-configured Image Rubber Stamps through the `enableRubberStamp` parameter in the web.xml file.

If the `enableRubberStamp` parameter is set to `true` and one or more Rubber Stamps are defined, then clicking on the **Text Edit** annotation toolbar button as shown below will produce the rubber stamp text menu.

Click on the **Image Rubber Stamp** button to see a list of available image rubber stamps defined by the system administrator.

> **Note**: If the `enableRubberStamp` parameter is set to `false`, then clicking the **Text Edit** annotation button allows you to select only **Add New Text** to add a text annotation.

The Pages and Documents Panels

The panel on the right side of the screen shows the thumbnails for the current image and for all the documents made available by multiple documents mode.

Select the **Pages** tab to display the thumbnails for the current image being viewed. Select the **Documents** tab to display thumbnails for the first page of every document made available by multiple documents mode.

> **Note**: Page and document thumbnails now display the file name in a footer. This is managed by the `displayThumbFooters` parameter in the config.js.file. It is off by default.

To select a specific page or document simply click on the corresponding thumbnail and that page or document will load into the main viewing area.

Show/Hide the Pages and Documents Panel

The Thumbnail panel provides a convenient way to:

- Navigate to any page in a document in the Pages panel.
- Select another document to view from the multiple Documents panel.
- Create a new document by dragging and dropping pages from another document.

However, this convenience does have a price. VirtualViewer HTML5 for Java performance degrades because it is processing every page in the document Pages panel and/or the first page of every document in the Documents panel.

If you want to speed up performance, your administrator may want to disable or hide the thumbnail navigation panels.

To hide or show the Pages and Documents panel, select the **Toggle Thumbnails** button .

Split Screen View

You can launch documents to a lower panel to visually compare documents in one viewer session. The main image panel on the top retains all feature functionality. The lower panel includes all functionality except the magnifier and the thumbnail panel functionality including page manipulations, text search, document notes, and bookmarks.

Follow the steps below to use the Split Screen View feature:

1. On the **Documents tab**, right-click on the document thumbnail for the document that you want to open in the lower panel and select **Document Comparison**.
2. The document in the main image panel appears in the top panel. The document that you selected from the Documents tab appears in the lower panel.
3. Scroll to navigate the pages in the lower panel.
4. To replace the document in the lower panel, right-click on another document thumbnail in the Documents tab and select **Document Comparison**.
5. To undo the Split Screen View, right-click on the document in the top or bottom panel and select **Close Document Comparison**.

Display Document and Page Properties

Select **Image Info** 🛈 to open a window with the following document properties information.

Page Manipulations

VirtualViewer HTML5 for Java allows you to add, remove and reorder pages by cutting and pasting the page thumbnails. This section describes how to enable and use the Page Manipulations feature.

Page Manipulations

Page manipulations are enabled by default. For more information on dis abling page manipulations, see the administrator's guide.

Selecting a Page

To select a page for page manipulation, left click on a page thumbnail in the Pages tab. A gray selection border around the thumbnail indicates that it has been selected for page manipulation.

Hold the **Ctrl** key while selecting multiple page thumbnails to allow the selection of all thumbnails selected for page manipulation.

Hold the **Shift** key and select a single thumbnail while one or more thumbnails are already selected to highlight all pages between the highest page selected before the new selection.

Loading the Page Manipulation Context Menu

Right-click on a page thumbnail to load the page manipulation context menu.

Cutting, Copying, Deleting and Inserting Pages

You can cut, copy, delete and insert a page from one document into another document in VirtualViewer HTML5 for Java.

Dragging and Dropping Pages

Follow the steps below to use the drag and drop page manipulations feature:

1. Click and hold on the thumbnail that you wish to move and drag it up or down in the thumbnail panel.
2. A blue line appears horizontally in the thumbnail toolbar (in between thumbnails) indicating where the page being dragged will be placed in the document.
3. Let the mouse button go where you would like to place the thumbnail.
4. The page being dragged lands in between the two pages where the blue line was indicating the drop would happen.

Notes:

- If the desired drop location is near the end of the document, drag the thumbnail to the bottom of the pane. The pane scrolls down as you reach the bottom.
- You can select multiple pages with the **Ctrl** click and drag those in tandem.
- Dragging and dropping between sessions with two separate windows or browsers is now supported. Dragging and dropping between sessions functions the same way as the **Copy** feature.

Saving Page Manipulations

Select **Save** to save page manipulations, including rotations and inversions, to the file currently being viewed.

Copy to New Document

To copy to a new document, follow the steps below:

1. Click on the page thumbnail or page thumbnails that you want to copy to the new document.
2. Right-click on the page thumbnail(s) to load the page manipulation context menu. Select **Copy to New Document** from the Page Manipulations menu.
3. In the Create New Document window, enter the new document name in the Document ID field and select **OK**.

The new document is displayed in a tab with the document name that you entered. It contains the pages that you selected.

Page Manipulations Across Multiple Browser Sessions

You can now to perform Page Manipulations (Copy, Cut, Paste) across multiple browser sessions using local storage. Local storage is browser-specific, which requires the multiple sessions to be within the same browser.

Document Notes

The Document Notes Panel allows you to add notes that are relevant to the active document that you are currently working with. It includes the ability to view, create, edit, and delete notes.

The time stamp is set by the server time for the computer of the user who created the note. The time stamp changes for the server time for the computer of the user when edited.

Creating Document Notes

To create a note, follow the steps below:

1. Select the **Notes Tab**.

2. In the Document Notes field, add the text for the note.
3. Select the **Add Note** to add the note.

Document Notes templates

Document Notes templates can be created in two ways, either by adding to the Document Note templates in **User Preference > Notes Templates** tab or your administrator can addthe template objects directly to the "noteTemplates" in **config.js**.

To add a Document Notes template in User Preference:

1. Select the **User Preference** button. From User Preference dialog box, choose **Notes Templates** tab.
2. Select **Add** button to create new Document Notes template.
3. In Template Name field, enter the template name.
4. In Template Text filed, enter the template text.
5. Select **Save** button to save the template
6. To edit the Notes template, select the template then edit the **Template name** or **Template Text** field. Select **Save** button to save update template or **Cancel** button to exit.
7. To delete a template, select the template then select **Remove** button. Select **Save** button to save change or **Cancel** button to exit.

To use your custom Document Notes template(s):

1. Select Notes Tab
2. Left-click **Select Template** button
3. Choose a template from the template drop down menu
4. Select **Add Note** button to add template to the document note.

Editing Document Notes

To edit a note, follow the steps below:

1. Double-click on a previously created note text to edit it.
2. In the Document Notes field, edit the note.
3. Select the **Apply** button to save the changes to the note.

Printing Document Notes

To print a note, follow the steps below:

1. Select the **Print** button.
2. Check the **Print Document Notes** check box and select the **Print** button. The "Save As PDF" option was removed because it has become a redundant feature that is now handled with the "Export" feature.
3. The Document Notes print on the last page of the document.

Document Notes Indicator

A red checkmark Document Notes indicator on the Notes Tab will toggle on if a document contains a document note, otherwise it will be toggled off.

Select Pages from the Thumbnails Panel

You can select pages from the Thumbnails panel for Export Pages or Print Page.

Follow the steps below to select pages from the Thumbnails panel for Export Pages or Print Pages:

1. Select one or multiple thumbnails from the Thumbnails panel.
2. Right-click to see options for **Export Pages** or **Print Pages**.
3. Select **Export Pages** or **Print Pages**.
4. On the dialog box, select **All Pages**, **Pages** (enter the page range), or the **Current Page**. The dialog box automatically displays with the page range.

Extract and Append Page Ranges

You can extract and append a range of pages instead of the entire document when saving to PDF. All pages do not have to be processed during saving. This provides a shorter save time for documents with a large number of pages (100+).

Bookmarks

The Bookmarks feature allows you to add bookmarks that are relevant to the active document that you are currently working with.

Creating Bookmarks

To create a bookmark, right-click on the Pages Tab and select **Add Bookmark**. In the Create a New Bookmark dialog, add the text for the bookmark and select **OK**.

Viewing Bookmarks

To view bookmarks, select the **Bookmarks** tab. The Bookmarks tab displays a list of all bookmarks created in that document. The list of bookmarks display the page number and text entered by the user.

> **Note**: The bookmarks feature is not supported in Virtual Documents, Print, Export, Save Document As, and Page Manipulation.

Text Searching

To search text, select the Search tab. Enter the text that you want to find and select the Search Document button. The text that you entered displays as highlighted in your document.

Pattern Based Text Searching

You can search for patterns in text including social security numbers, phone numbers, credit card numbers, and email addresses. You can use this information to quickly locate, redact, or collaborate on important information within documents.

To search pattern-based text, follow the steps below:

1. From the **Search** tab, select from the drop down for the available patterns to search. For example, select a **social security** pattern. VirtualViewer searches the document for all patterns matching a social security pattern: ###-###-####.
2. VirtualViewer highlights patterns returned by this search as it highlights any text search results.
3. Use navigation arrows to scroll through the patterns results.
4. Use the **Redact Current Match** button to redact the current pattern search

result. Use the **Redact All Matches** button to redact all pattern results.

The available patterns include:

- Social Security Number:
    - 123456789
    - 123-45-6789
    - 123 45 6789
- Telephone Number:
    - 6176072000
    - 617 607 2000
    - 617-607-2000
    - (617)-607-2000
    - 617.607.2000
    - (617).607.2000
- Credit Card Number:
    - 1234567891234567|
    - 1234-5678-9123-4567
    - 1234 5678 9123 4567
    - 1234.5678.9123.4567
    - 123456789123456
    - 1234-567891-23456
    - 1234 567891 23456
    - 1234.567891.23456
- Email Address:
    - Any string including a @ symbol with characters on either side of the symbol.

Pattern based text searching works with any format that is supported for searching text. This includes AFP, PCL, PDF, Word and Excel.

Please note that a text pattern search result that breaks on two separate lines will not be found. Similarly, a text pattern search that contains odd text spacing between characters may not be found.

OCR Integration-based search

The OCR function allows searching text in an image document (TIFF or PNG initially) as well as selecting text in the VV client after the document has been OCRed. To OCR a

document in the VV client, a user must search for text in a non-text document to get the OCR prompt. The OCRed result is cached; while that result is cached, the user can search for and select text without a further OCR prompt.

This is a new OCR option in VirtualViewer. We expect to continue to expand the choice of OCR recognition engines in going forward.

Searching is performed using the Search tab in the thumbnail panel.

The original image will overlay the OCRed textual data to maintain the greatest similarity to the original document. The search text string will be highlighted. "Previous" and "Next" match buttons will work as normal. "Redact" and "Redact All Matches" work as normal. Applying redaction tags to results works as normal.

A wait icon will be displayed while the OCR process is running.

OCR will not be initiated if the input document is not raster. Saving to a PDF file is an option. Additional language support can be added by the customer.

Working with Redactions

This section explains the redaction feature and how to work with redactions.

It is important to note that any area marked for redaction will not be redacted until a new document is created from the original document by **Save Document As** or **Export Document**. The original document will only show the areas that were marked for redaction, but those areas will not be permanently redacted until a new document is saved through **Save Document** As or **Export Document**.

There are three ways to mark an area for redaction:

1. Select the **Redaction Area** tool from the Annotation tool bar.
2. Select text, right click and then select **Redact** from the menu.
3. **Search and redact**: You can step through the search results and mark each redaction by selecting the Redact Current Match button or select the Redact All Matches button to redact all search results.

REDACTION INFORMATION WARNING MESSAGE

A "Redaction Information: Read Carefully" warning message displays the first time that you select the **Redaction Area** tool. It reads:

> **Creating a Redacted Version**
>
> When marking an area for redaction on a document, the underlying text will remain visible to all users when viewed within the original document. Redactions are permanently applied when saving a redacted version of a document, and only that version is considered a redacted document.
>
> **Search and Redact**
>
> Search and redact results do not account for content which may appear in images as well as in non-text line art. Redactions for content in images should be created using the manual redaction toolbar option found in the Annotation Toolbar. Search and redact results should not be considered a fully thorough mechanism to ensure all expected content has been discovered.
>
> **Visual Verification**
>
> Before creating a redacted version of the document, visual confirmation is strongly recommended to ensure all expected content has been identified and marked for redaction.

This message is triggered by any of the following events:

- You select the Redaction Area tool.
- You select Redaction from the selected text content menu.
- You select the Mark for Redaction button in Search and Redact.
- You open a document that contains saved Redaction annotations that have not been burned in.

Note: This message shows once per user session when you initially work with a document with areas marked for redaction.

Redaction Areas

Select the Redaction Area button from the Annotation toolbar to mark an area of your document for redaction. Drag your mouse to create a translucent rectangle over the area that you want to mark for redaction. The redaction area is a rectangle with translucency. You can see through the rectangle and read the text behind the annotation.

To delete the redacted area, right-click on the translucent rectangle covering the text that you have marked for redaction and select the **Delete** button. In the Delete Annotation? dialog, select the **Delete** button.

Using the Redaction Area tool is the quickest way to mark an area for redaction.

Redacting by Selecting Text

Select the text that you want to redact. Right click and then select **Redact** from the menu.

To delete the redacted area, right-click on the translucent rectangle covering the text that you have marked for redaction and select the **Delete** button. In the Delete Annotation? dialog, select the **Delete** button.

Using this method to redact selected text will only grab the vector text. (Embedded images cannot be redacted in this mode.) The advantage is that you can visually see the

text selected for redaction and avoid marking the white space. The disadvantage is that each line is marked for redaction as a separate block. Each block needs to be edited or deleted separately.

Search and Redact

Use one of the following two methods for marking redaction areas in search results:

1. Clicking the **Redact All Matches** button applies redactions to all matches on all pages of the current document.
2. Clicking the **Redact Current Match** button moves to the next result and requires you to click the **Redact** button or skip the match and press the **Next Match** to move on to the next result.

Reactions in Save Document As, Export Document, Email Document and Print

The **Save Document As, Export Document, Email Document** and **Print** toolbar options include the **Burn Redactions (Permanent)** check box.

It is important to note that any area marked for redaction will not be redacted until a new document is created from the original document by **Save Document As** or **Export Document**. The original document will only show the areas that were marked for redaction but those areas will not be permanently redacted until a new document is saved through **Save Document As** or **Export Document**.

Page Manipulations with Redactions

When copying or cutting to an existing document, page manipulations will act as follows:

- If pages that are copied/cut to an existing document contain redaction areas, those redaction areas will be copied to the new location, but not burned in.
- When you select save, the page manipulations will be saved, leaving the redaction areas.

- When copying or cutting to a new document, page manipulations will act as follows:
- If pages with redactions are copied/cut to a new document, you will see the existing Dialog box to name the new document.
- The new document is not saved until the user selects save.
- When you save the newly created document, the document and the redaction areas will be saved.

Annotation Redaction Tagging

Annotation redaction tagging assigns a categorical value to individual annotations or redaction. The values are reasons why the annotation or redaction exists. For example, a social security number could be tagged with a Social Security Number value. Follow these steps to apply annotation redaction tagging:

- Draw a redaction object over the item that you wish to redact such as a social security number.
- Right click on the redaction object when still in highlight mode and select from a predefined list of redaction tags. For Example, "Social Security Number."
- Select **Save Document As** to burn in the redaction with tag. The new document with the burned in redaction now has the Social Security tag to indicate it was a redacted social security number.

Tag Search Results

Follow the steps below to use the tag search results feature:

1. Load a text searchable document in VirtualViewer.
2. Search for a term.
   Note: You administration can predefine the list of annotation redaction tags by adding strings to the annotationTags array in config.js. For example, `annotationTags: ["Social Security Number", "Review"]`
3. Select **Redact All Matches**.
4. Select the **Tag All Redactions** button.
5. In the Tag All Redactions dialog, select the type of redaction from the Tag(s) drop down and select the **OK** button.
6. The redactions are now tagged.

Disabling Redaction Tags for Export, Print, Email, or Saving As

You can disable redaction tags when a document is exported, printed, emailed, or saved as.

Follow the steps below to disable redaction tags when a document is exported, printed, emailed, or saved as:

1. Create a redaction on your document. Right-click on the redaction, select **Add Tag** and select a redaction tag from the drop-down menu to add a redaction tag.
2. Select the **Include Redaction Tags** checkbox when selecting **Export**, **Print**, **Email**, or **Save Document As**.
3. If you select the **Include Redaction Tags** checkbox, the redaction tags are included. If you uncheck the **Include Redaction Tags** check box, the redaction tags are not included.

The **Include Redaction Tags** check box defaults to checked. It is disabled if the **Burn Redactions** check box is unchecked.

Watermark Support

VirtualViewer now offers watermarks for customers who need to mark page backgrounds with specific notifications such as "Private", "Confidential", "Do not distribute" and so on. Watermarks can be created that are transparent or solid, of varying fonts and sizes and positions. They can also be restricted to admins versus all users.

They can also have dynamic tags for user name, page numbers, print time, and document name.

What does the User Interface look like?

There are a few UI changes. A new watermarks dialog lays out all the watermarks options for creation, deletion and editing. In the "document handling" dialogs (printing, exporting, etc) a new checkbox has been added, so the user may decide whether to burn their watermarks when exporting.

If a watermark is marked as admin-created, then the "burn watermarks" option will be checked and disabled, so the admin watermarks burn by default. Similarly, a non-admin may not edit or delete admin-created watermarks.

Those dialogs are the only way to interact with watermarks. You can't select them on the document, move them around, etc--they're not annotations, they're marked into the document once created.

Other features

Users may add dynamic data into their watermark text. This is easily done in the watermarks dialog by clicking on a tag button above the text box in the watermark dialog. If you inspect the raw text of the JSON, a tag will appear enclosed in two @ signs, which may be escaped by adding a /. When displayed, the tag will be replaced by data.

For instance, the user wants a page number to print on each page. They click the tag button in the dialog. In JSON, now the watermark text would say, "Page @@pagenumber@@". When displayed on the document, the watermark on page one

will read "Page 1", the watermark on page fifty will read "Page 50" and so on. If the user types "If I wanted a page number I would use /@/@pageNumber/@/@", the watermark will now display "If I wanted a page number I would use @@pagenumber@@". The tag is escaped, and so is not replaced by a dynamic number.

Available tags are as follows:

- Username: the user's username as stored in user preferences.
- total pages: the number of pages in the document.
- current page number: the number of the current page.
- print time: The date & time when the document was exported or printed. When displaying in the viewer, this is just an example date and time, from when the document was opened.
- document name: The display name of the current document.

User Preferences

The User Preferences feature allows you to configure the icons, annotation properties, text stamps, and the default fit to display in the viewer. Select the User Preferences icon to open the User Preferences window.

> **Note**: Select the **ctrl + '** shortcut key to launch the user preferences dialog box. This is useful if you have turned off the User Preferences icon in the toolbar and want to open the User Preferences window.

VirtualViewer provides you with four user preferences panels:

1. Toolbar Configurations
2. Annotation Properties
3. Custom Text Stamps
4. General Preferences

> **Note**: The changes that you make in User Preferences are saved to your local storage on the browser that you used when making the changes. Your User Preferences settings will only be visible on the browser on the computer where you saved the settings.

Toolbar Configurations

This panel enables you to show or hide each button on the Image Controls and Annotation toolbars. To do so:

- Check or uncheck the check box for the toolbar button that you want to turn on or off.
- Check the box to show the button on the toolbar. Uncheck to hide that button from the toolbar.
- Check or uncheck the top check box to turn on or off toolbar icons.

The icons will shift on the toolbar to fill in the space left by icons that are turned off.

Annotation Properties

This panel determines the default values for the annotation types. This includes the font type and size, font color, and line size.

Custom Text Stamps

This panel defines custom text stamps. Select the [+] button to add a custom text stamp. Enter the display name and stamp text. Select the appropriate font color, font type, font size, bold or Italic text. Select the [-] button to remove a custom text stamp.

The panel shows a real time preview of the custom text stamp.

- The display name shows the text that displays for the custom text stamp in the toolbar.
- The stamp text displays the text that is displayed in the custom text stamp annotation.

Custom text stamp is disabled by default. To enable custom text stamp, your administrator must set the `enableTextRubberStamp` parameter to `true` in config.js.

General Preferences

This panel determines general preferences, as well as the default fit-to preferences.

Select **Fit to Window**, **Fit to Height**, or **Fit to Width**.

Select **Zoom Percent**. From the drop down select the zoom level from the following:

2, 3, 4, 6, 8, 10, 15, 20, 30, 40, 50, 75, 100, 150, 200, 300, 400, 600, 800, 1000.

Once the level is chosen and saved, the document will automatically switch to the selected zoom level. For example, if you choose 75, the document will zoom to 75%.

Set your username

To set the username for Document Notes and Annotation Commenting, select **User Preferences** and then select the **General Preferences** tab.

In the **Username** field, enter your desired username and click **Save**.

Clear local storage

Select the **Reset** button to clear local storage and remove the browser specific, user defined stamps.

Select the **Save** button to save your user preferences in the browser cache. Select the **Cancel** button to cancel the window.

Mobile Device Controls

VirturalViewer now works more elegantly in small iframes, on low-resolution monitors, and when browser windows resized smaller.

Zoom, pan, and pinch

The user can pan on an image, if it's zoomed in, in all directions.

Using two fingers. the user can pinch to zoom in or zoom out on the document. The **zoom motion is not animated,** so the increase/decrease in size will happen when the user is done pinching.

> **Note to administrators**: `imageScrollbars` should be set to `false` in config.js for this to work.

Toolbar details

On large screens, the toolbars look exactly the same as before. As the screen/window size is reduced, buttons collapse into menus, and on the smallest size screens, all of the menus will be consolidated into a single mobile-device menu, accessible from the "hamburger" menu on the top left of the viewer.

This ensures usability for embedding viewers in small iframes (such as in an Alfresco implementation) or when using the viewer on an iPad.

Unsupported Features on Mobile Devices

- Drag and Drop
- Search and redact are disabled if redaction is disabled
- Document comparison, when offered, will not be supported for mobile devices
- Though several mobile devices have been approved, we cannot guarantee that all mobile devices are supported.
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