

---

IMARKUP SOLUTIONS, INC.

# **iMarkup Annotation User Guide**

## ***iMarkup Plug-in***

---

Copyright 2006 © iMarkup Solutions, Inc.  
www.imarkup.com sales-info@imarkup.com  
Phone (877) MARKUP1 • (760) 631-4560 • Fax (760) 631-0506  
1/3/2006

# Table of Contents

<b>PLUG-IN OVERVIEW .....</b>	<b>1</b>
INTENDED AUDIENCE .....	1
IMARKUP PLUG-IN OVERVIEW .....	1
IMARKUP PLUG-IN .....	2
<i>How the iMarkup Plug-In Works</i> .....	2
<i>iMarkup Client vs. the iMarkup Plug-in</i> .....	2
<i>Installing the Plug-in</i> .....	2
<b>USING THE IMARKUP PLUG-IN .....</b>	<b>3</b>
PLUG-IN INTERFACES .....	3
<i>iMarkup Menu Bar</i> .....	3
<i>iMarkup Explorer Bar</i> .....	4
USING ANNOTATIONS .....	5
<i>Placing Annotations</i> .....	5
<i>Additional Options</i> .....	6
<i>Categories</i> .....	7
COLLABORATING WITH OTHER USERS .....	8
<i>Permissions</i> .....	8
<i>Threaded Discussions</i> .....	8
<i>Organizer Functions</i> .....	9

## Plug-in Overview

**T**his document describes the iMarkup Plug-in and how to use the collaboration and annotation functions. This document is intended for users of an application that utilize the iMarkup Plug-in (e.g. iMarkup Server v6). The iMarkup Plug-in runs in the Internet Explorer (IE) browser and does not activate until it connects to a server application that enables the functions. It provides the annotation and collaboration capabilities on documents and web pages during the review and approval process. The plug-in is optional with the iMarkup Server.

### Intended Audience

This document is intended for the users of a server application that utilizes or has integrated the functions of the iMarkup Plug-in (e.g. iMarkup Server v6, Java Annotation SDK). This document describes the use of the collaboration and annotation functions. It is assumed that the reader is familiar with the server application and when the plug-in functions are available to them (e.g. during a review and approval workflow).

### iMarkup Plug-in Overview

The iMarkup Plug-in is an ActiveX control that runs in Internet Explorer (IE) browser. The plug-in activation and interface is controlled by a server application. The iMarkup Plug-in provides:

- the graphical annotation and collaboration features while reviewing content;
- an Explorer Bar and Menu Bar interface in the browser when activated.

# iMarkup Plug-in

## How the iMarkup Plug-In Works

The iMarkup Plug-in is a free browser add-on that provides extended capabilities to the iMarkup Server users (e.g. annotations, MS Office integration). The free plug-in also allows a user to receive emails that contain annotations made by the iMarkup Client. When an email attachment with annotations is opened it will open a browser, navigate the user to the appropriate web page, and display the annotations.

The iMarkup plug-in will automatically activate inside the user's browser at various times (e.g. during the review and approval workflow in the iMarkup Server). When the iMarkup plug-in activates in the browser it will display the appropriate interfaces as defined according to the user's profile.

## iMarkup Client vs. the iMarkup Plug-in

The full iMarkup Client contains the free iMarkup Plug-in. The iMarkup Client performs all of the functions of the free plug-in, with the additional ability to perform annotations locally on any web pages they navigate to. The iMarkup Client also supports a server application that has integrated the annotation functions. If a user has the full iMarkup Client installed they do not need to install the free plug-in. Once connected to a server application (e.g. iMarkup Server) the iMarkup Client interface and functions that are available will change according to the user's profile.

## Installing the Plug-in

The iMarkup Plug-in can be distributed as a downloadable installation program or it can be installed over the Web. The installation program can be downloaded from the iMarkup site (<http://imarkup.com/download/plugin/>) or it can be obtained from the vendor of the server application. The iMarkup Plug-in may also be installed automatically by the server application.

If a user without the iMarkup Plug-in navigates to the iMarkup Server and requests a function that requires the plug-in, they will be given the option to install the plug-in at that time.

## Using the iMarkup Plug-in

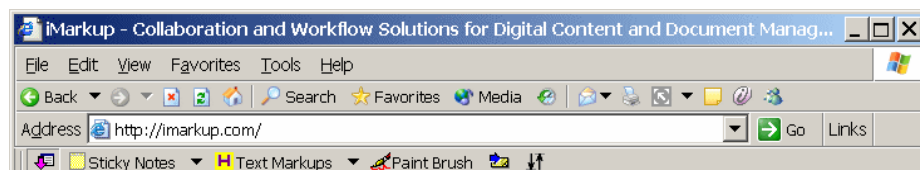
The iMarkup Plug-in is a browser add-on that provides the annotation capabilities for any type of content review or collaboration. The plug-in is an optional extension of the iMarkup Server. The plug-in is free and runs within your Internet Explorer (IE) browser. The iMarkup Server allows users to automatically install the plug-in. The iMarkup plug-in provides the following functions when used with the iMarkup Server or another server application that has integrated the functions.

This chapter documents the functions that are provided by the iMarkup Plug-in. Some of the interfaces and functions may be different in your environment depending on your profile configuration on the server application.

### Plug-in Interfaces

#### iMarkup Menu Bar

The iMarkup Menu Bar is the bar displayed as a menu on the top of your web browser window. From the iMarkup Menu Bar you have access to the annotations configured in your profile on the application server.

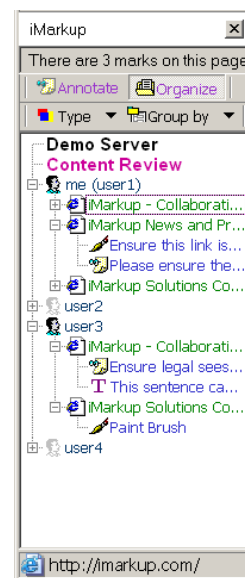


The iMarkup Menu Bar contains menu buttons that display the annotation types available to you. After selecting an annotation from the menu bar, click on the web page to place the annotation at that location.

## iMarkup Explorer Bar

When activated, the iMarkup Explorer Bar is the vertical bar displayed on the left side of your web browser. The Explorer Bar can contain two buttons, an Organizer and an Annotate button.

The Organizer allows you to see other users that are participating in this review. Depending on the selection of the *Type* menu button the annotations can be displayed by user or all annotations can be shown for just the selected users. The *Group by* menu button allows annotations to be displayed by category, web site, URL or modify/create times. Clicking on any of the entries will navigate to the appropriate page. Users that have ghosted User ID's are not currently logged in.



## Using Annotations

The iMarkup Plug-in supports three annotation types (also known as markups). There are sticky notes, freeform drawings and text markups.

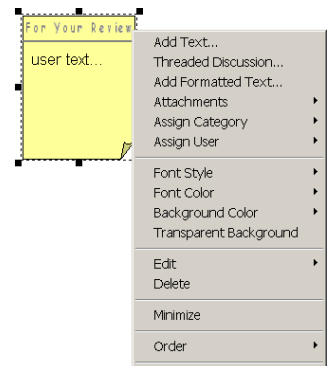
## Placing Annotations

Annotations can be placed on a web page by selecting the annotation type in the iMarkup Menu Bar and click on the page. Once an annotation is placed, it will be automatically saved on the server. Each annotation type has different functions available to them. After placing an annotation on a web page, right click on it to see the menu items with the available functions.

### Sticky Notes

To add a sticky note to a web page, select one of the available notes and click anywhere on the web page. The sticky note will be placed in that location. Text can be added to sticky notes by single clicking on it and typing.

Sticky notes can be moved by clicking on it and dragging the mouse. It can be resized by single clicking on it and dragging the *tracker handles* that are displayed around the sticky note.

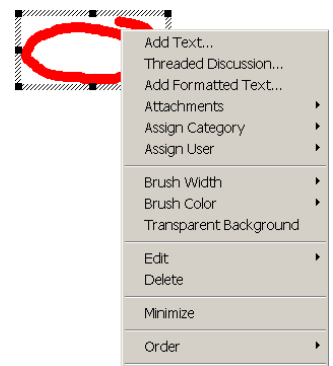


### Freeform Drawings

The iMarkup Paint Brush enables freeform drawings on a web page. This allows a drawing of any shape, size or color to be made. To create freeform drawing on a web page, click on the Paint Brush tool in the iMarkup Menu Bar, then use the mouse to draw on the screen by holding the left mouse button down. When you lift the mouse button, the drawing will stop.

Comments can be added to freeform drawings by double clicking on it and typing into the dialog displayed (or by right clicking and selecting the **Add Text** menu item). Use *Ctrl-Enter* to force a carriage return inside the input dialog.

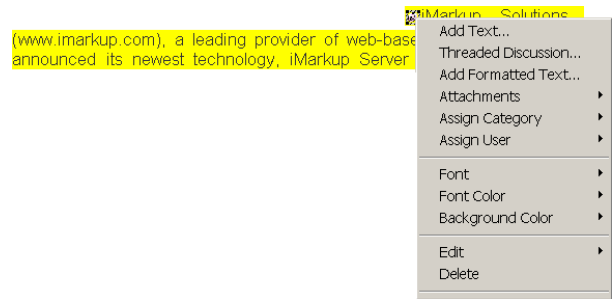
Freeform drawings can be moved by clicking on it and dragging the mouse. They can be resized by single clicking on it and dragging the *tracker handles* that are displayed around the drawing.



### Text Markups

The iMarkup text markups enable comments to be made to specific words, sentences or paragraphs on a web page. Various text markups are available, including highlighting, strikethrough, underline, and bold. To markup text on a web page, click on the desired text markup in the iMarkup Menu Bar and then click on the paragraph you want to mark. This

performs the operation on the entire paragraph. Or you can first select any text on the web page and then click on the desired text markup to perform the operation on the selected text only. This can also be performed by selecting text on the page, right clicking on the selected text and choosing the desired text markup menu item.



Comments can be added to text markups by double clicking on it and typing into the dialog displayed (or by right clicking and selecting the **Add Text** menu item). Use *Ctrl-Enter* to force a carriage return inside the input dialog.

### Usage Tips

Different annotation types are better suited for different types of content. When a sticky note or a freeform drawing is placed on a page, the annotation is associated with (or anchored to) the content objects beneath them. For example, if an annotation is placed on top of an image, the annotation will automatically reposition itself to follow that image if the page layout is changed. This can give the appearance of annotations moving around on a page. To be sure your annotations and comments are associated with the appropriate items on the web page you can follow these tips:

- When commenting on web page text, use the text markups. Text markups are matched to the exact text that was selected when the annotation was performed. Text markups will never be automatically repositioned on a page; they will stay associated with the originally selected text.
- When using the freeform drawing, use smaller drawing sizes. The smaller the freeform markup, the more accurate the association to items on the page will be.
- If you are want to use a sticky note to comment on a specific item on the page, it is best to use one of the “arrow” sticky notes. The sticky note will be associated with (or anchored to) the item directly under the tip of the arrow.

## Additional Options

### Formatted Text

All annotations can have text comments associated with them. If formatted text or images are required in the comment, the formatted text option can be used. To add a formatted text comment to an annotation, right click on the item and select the **Add Formatted Text** menu item. This will open Windows WordPad and allow text comments and/or images to be placed in the document. Close the WordPad application when you are done.

## Attachments

The annotations support file attachments, voice annotations and hotlinks. When corrections to a web page are too extensive to convey in a text comment, you can attach a file with as much information as required. To attach a file, right click on the annotation, and select the **Attachments**→**Add File Attachment...** menu item. This will display a dialog allowing a file to be selected. To display the attached file, click on the paper clip icon that is associated with the annotation.

In addition to file attachments, you can also add voice comments. To attach a voice annotation to any markup, place a markup on a page then right-click on it and select the **Attachments**→**Add Voice Annotations** menu item. This will display a dialog box; press record, start speaking, press stop when you want to conclude the voice message. A special speaker icon will appear on the markup. You can click on the special icon to hear the voice annotation.



## Annotation Characteristics

The annotations characteristics can be changed by right clicking on the item and selecting the desired menu items. This includes the ability to set annotations as transparent, changing their colors, changing a sticky notes font size, and changing a freeform drawing width, to name a few. Sticky notes and freeform drawings can also be minimized to reduce the amount of area covered up on the web page. This can be done by right clicking on the annotation and selecting the **Minimize** menu item. When the mouse is moved over the minimized icons, they are automatically expanded. Additionally, all sticky notes can be automatically minimized, if desired. This is done by pressing the *auto-minimize* button on the iMarkup Menu Bar.

## Assigning Annotations

If you have been given the appropriate permission (i.e. “create”) then individual annotations can be assigned to other users. This is accomplished by right clicking on the annotation and choosing the **Assign User** menu item. This has the effect of making the annotation look as though it was created by that user.

## Categories

### Assigning Categories

All annotations can have categories assigned to them. The category names available to you are configured on the server application. Categories allow annotations to be grouped together. To assign a category to an annotation, right click on the item and select the **Assign Category** menu item and choose the appropriate category name that is listed.

### <CLOSED> Category

If a category named <CLOSED> exists and you assign it to an annotation, this will mark the annotation as closed. This will cause the annotation to disappear from your page, unless you have permission to view closed annotations.

### Viewing Categories

To view the category assigned to an annotation move your mouse over the item and it will be displayed in the *tooltip* (a small yellow popup window). The iMarkup Organizer can be used to display all annotations in each of the categories. Use the **Group by** menu button and choose the **Group by Category** menu item. This will display the available categories and the annotations contained in each.

## Collaborating With Other Users

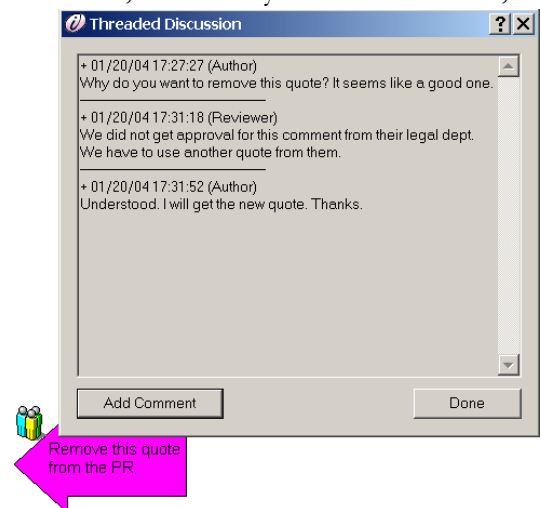
The iMarkup Plug-in allows you to collaborate with other users and view their annotations and comments.

### Permissions

The server application determines the types of permissions you have for other users. You will not be able see another user's annotations unless you have been given **read** access to them. If you have read access to another user, you will be able to see their annotations, but you will not be able to modify them. This will cause the cursor to be displayed as a “no” symbol when it is moved over the annotations of those users. If you are given **write** access to another user, you will be able to modify their annotations.

### Threaded Discussions

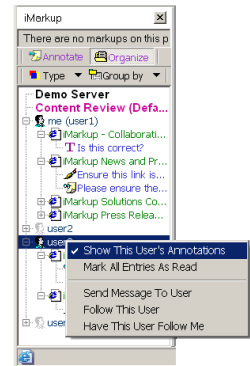
Threaded discussions can be performed on any annotation. Comments are appended to a threaded discussion and are associated with a specific annotation. Once a comment is added, it cannot be modified. To start or view a thread discussion, or to add your own comment, right click on the annotation and select the **Threaded Discussion...** menu item. This will open a dialog that displays the current discussion thread and allows you to add your comment using the **Add Comment** button. Close the threaded discussion dialog when you are done.



## Organizer Functions

### Viewing Other's Annotations

Using the iMarkup Organizer, you can see all of the users that are currently reviewing the same content (e.g. participating in the same workflow). You can show or hide each user's annotations on the current web page by right clicking on the user in the Organizer and selecting the **Show The User's Annotations** menu item.



### Instant Messaging

Using the iMarkup Organizer, you can send a message to another user. Users that are not currently logged in to the server are displayed with their User ID ghosted. The user does not have to be currently logged in to send them a message. They will receive the message when they login. You can send a message to a user by right clicking on the user in the Organizer and selecting the **Send Message To User** menu item.

