

If you need Aprimo assistance, click here to access the [Aprimo Resource Center](#)

Aprimo User Support Tip Document

Annotation Viewer

How to use Annotation Viewer

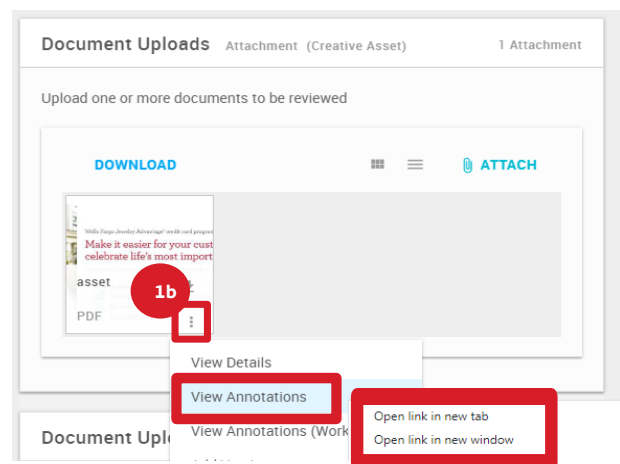
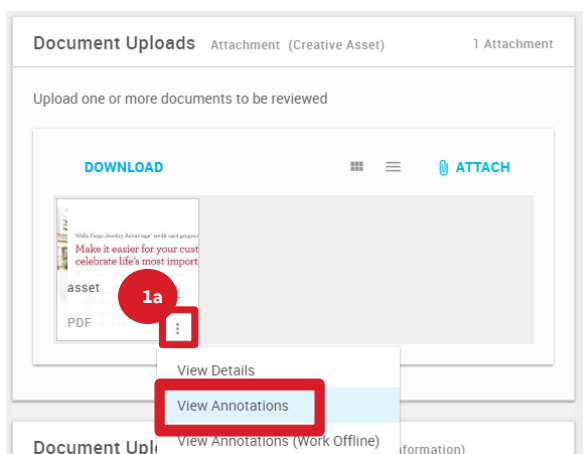
The Annotation Viewer is an Aprimo tool used to gather and communicate reviewer feedback. Reviewers input feedback (annotations) and others are able to view and respond to the feedback.

Key Points

1. Document must be in PDF format in order for the Annotation Viewer to function.
2. Annotations will default to a status of “draft” when initially created. When an annotation is in draft status, the creator can still edit and delete the annotation and it is not visible to any other users.
3. To finalize the annotation it will need to be set to “published” status. When the action of publishing annotations is selected, this will change the status to “published” and makes the annotation visible to users. In this finalized status of published, a user will not be able to edit or delete the annotation. The option to reply to the annotation is available.
4. Users can access the annotation functionality within a task or at the project attachments section.

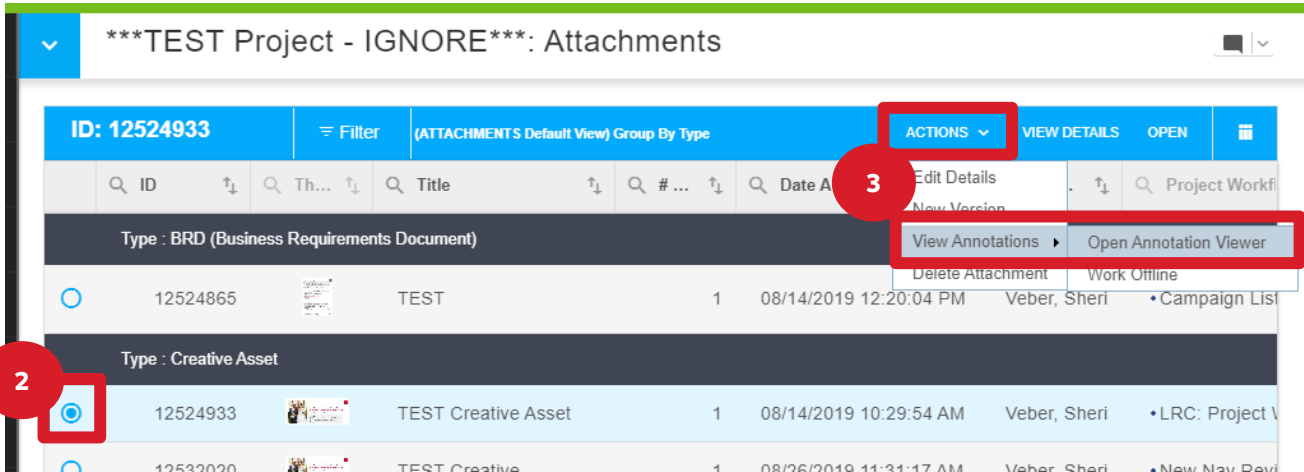
Accessing the Annotation Viewer

1. To access the Annotation Viewer in *any task type**:
 - a) Click "View Annotations" to open in same browser window.
 - b) Right click "View Annotations" to open in new browser window or new browser tab.



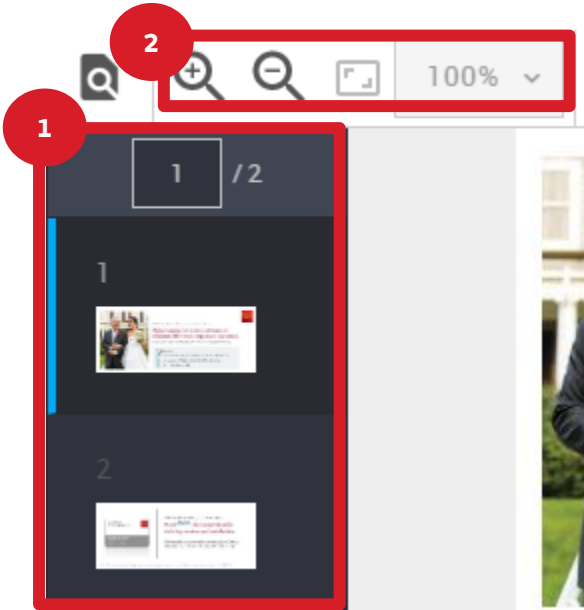
*Reminder: documents will be found in "Review Materials" section for review tasks and in "Document Uploads" section for all others.

- For the **Project Attachments**, select the circle next to the attachment.
- In the blue bar in the top right, hover over actions, and select “View Annotations,” then “Open Annotation Viewer”.



Common Used Annotation Tools

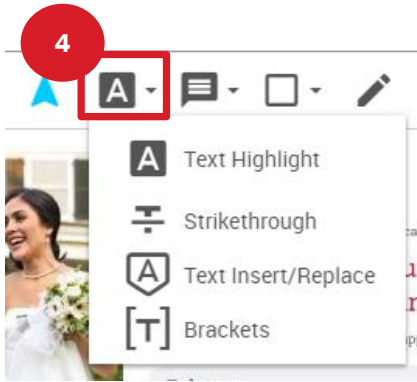
- Page Thumbnail Panels – Easily see thumbnails and navigate through pages within the attachment.
- Zoom in/zoom out feature – Allows the user to zoom in or out on the attachment.



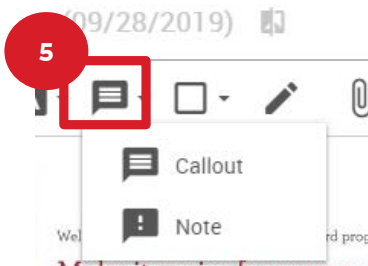
- Rotate buttons – This allows to rotate the document as needed.



4. Annotating text – This includes highlighting, strikethrough, text Insert/Replace, and text brackets.



5. Notation feature – This allows to put a note or comment. It is best practice to use the “Note” option when leaving comments.



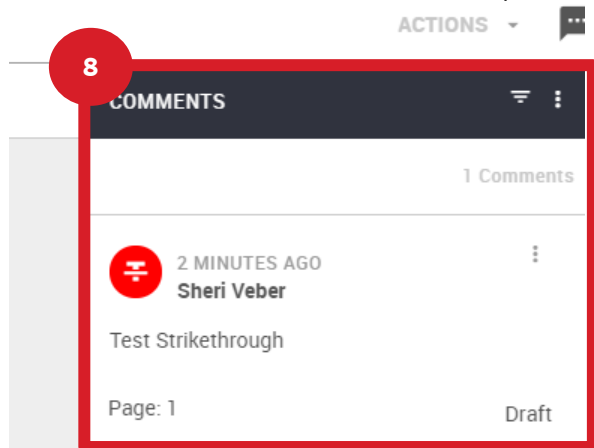
6. Hide Annotations – This will temporarily hide all annotations.



7. Side-by-Side feature – This allows to review documents side-by-side in the same window.



8. Comment Panel – Annotations will show up in this panel.

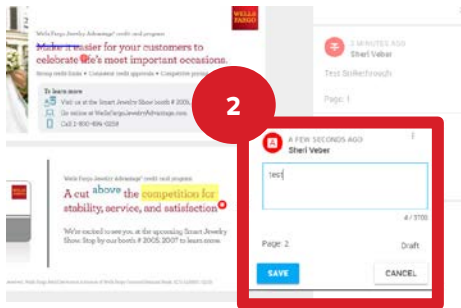


How to use Annotation Viewer

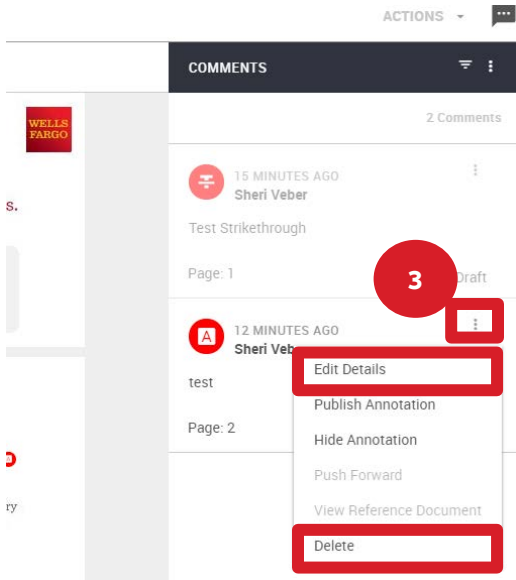
1. Select the icon for the annotation. (For example: Strikethrough text – select the icon for text annotations and click on “Strikethrough”.)



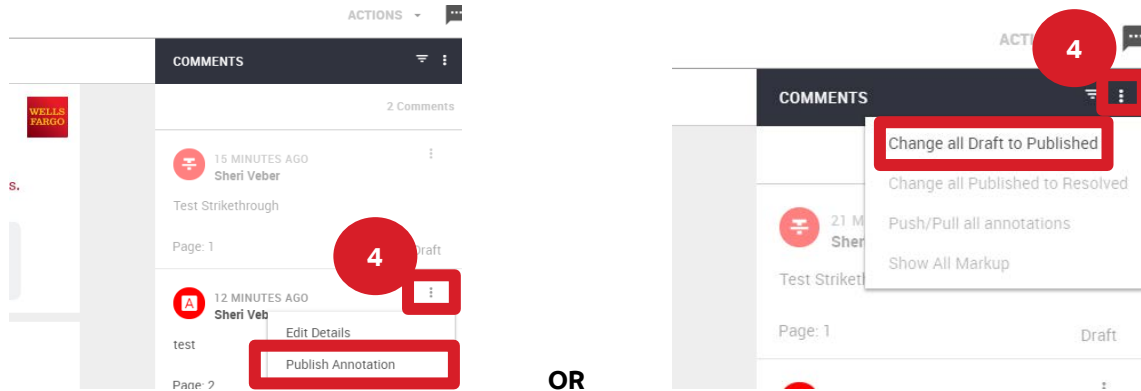
2. Move cursor where the annotation should be made, click and drag. Release the mouse and a window will pop up to add your comment. Click “Save”



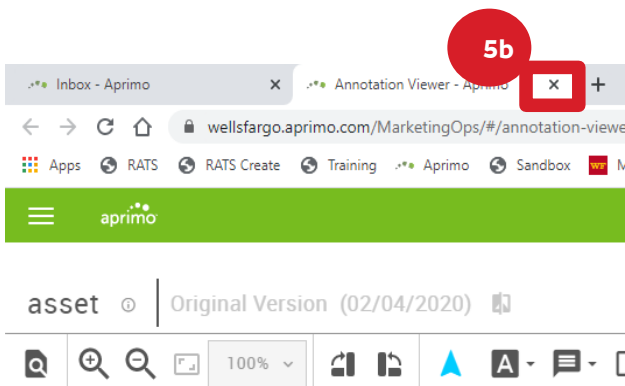
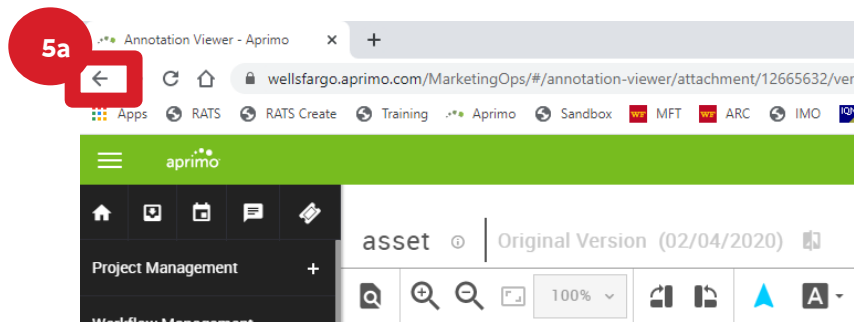
3. The annotation will show up in “Draft” status. Since it is in draft status, edits can be made or the annotation can be deleted. To edit or delete, select the Menu icon on the annotation in the comment panel. You can select edit or delete.



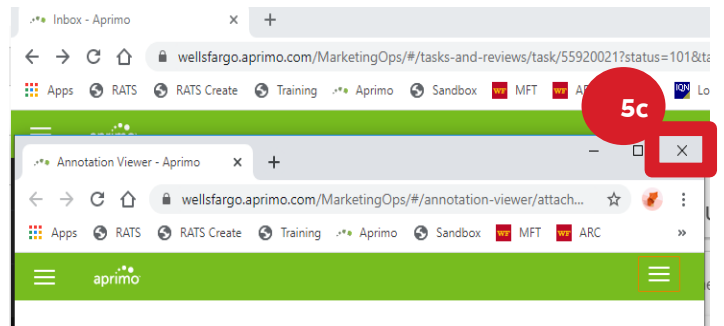
- When the annotations are ready to be finalized after reviewing, they will need to be published to be visible to other users. This can be done one at a time or all at the same time.



- When all annotations are published and the review is completed:
 - if annotations were viewed in the same browser, click the back arrow to return to the task;
 - if annotations were viewed in a new tab, click to close the tab to return to the task;
 - if annotations were viewed in a new window, click to close the window to return to the task.



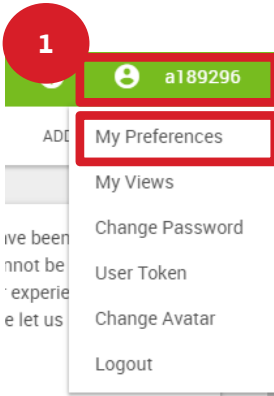
OR



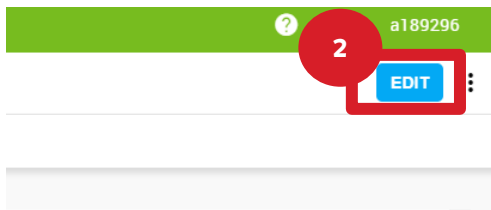
Adjusting preferences in Aprimo for Annotation Viewer

Persistent annotations is an option that will allow a user make continuous annotations with the same markup tool. It is recommended for users to turn this feature off when using annotation viewer. To turn off the persistent annotation feature in Aprimo follow these steps:

1. From the Aprimo homepage, click the avatar icon in the upper right hand corner and select “My Preferences.”



2. Select Edit in the upper right hand corner.



3. Scroll down to the Annotations section. Change the field for Persist Tool Selection to No from the drop down.
4. Click Save.

