

OpenText™ Brava!™ HTML Viewer

User's Guide

This guide is intended for Brava! Enterprise HTML Viewer users. It provides information for using the HTML Viewer user interface.

Brava! HTML Viewer User's Guide

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This documentation has been created for Brava! Enterprise software version 16.0.

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at <https://knowledge.opentext.com>.

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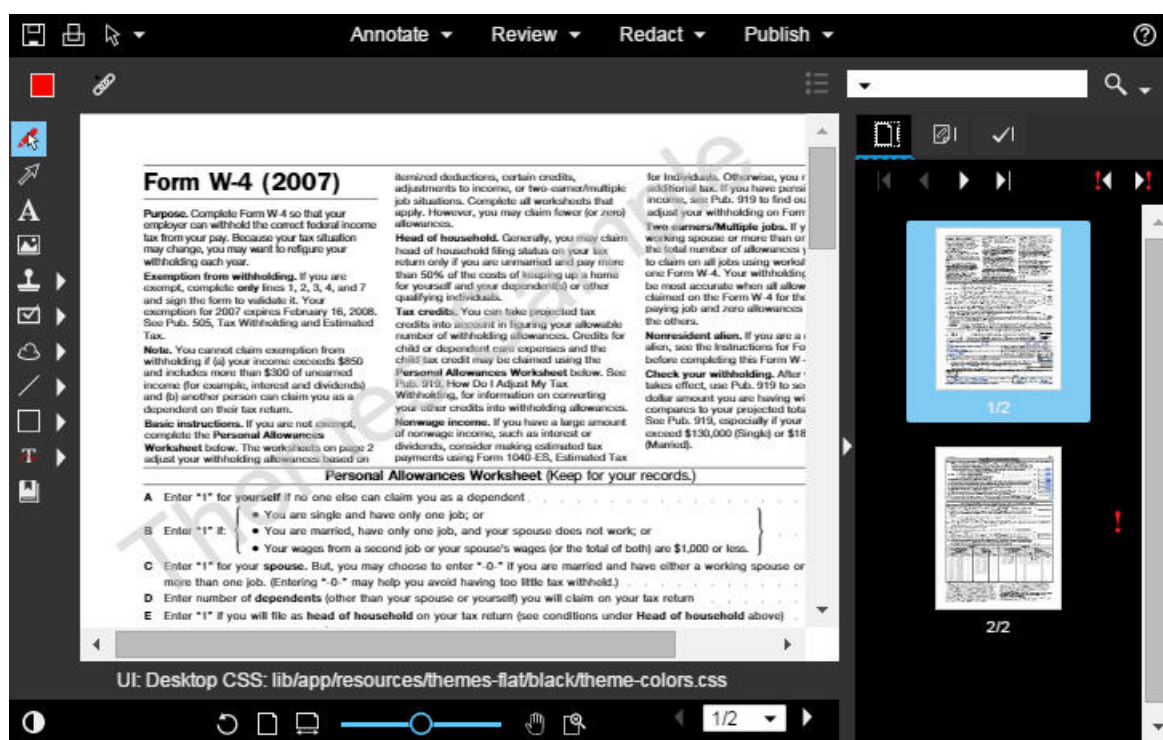
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Introduction

The OpenText™ Brava!™ HTML Viewer provides users the capability to load a wide variety of document types from the Brava! Server online using a web browser. Files are processed with the Brava! Enterprise Server as HTML output and are presented in the HTML viewer which supports view, search, annotation, redaction, print, and publish.

Additionally, the Brava! HTML viewer provides support for 3D viewing, video viewing, document compare, eSignature, and mobile device (tablet and phone) user interfaces. These optional viewing modes can be set up by your server administrator from the sample files provided in the Brava! HTML viewer installation folders.



Typically, the Brava! HTML Viewer will be set up as part of an integration. In this case, Brava! HTML Viewer will launch from document links or menu commands within the integration application. Sample HTML launch pages are provided for HTML 3D, Compare, Compare-report, Signature, Video, Virtual document binder, Export Changemarks as Word comments, and simple themes which can all be configured by your administrator.

Brava! HTML toolbars

Below are all of the toolbars that can become available in the Brava! HTML Viewer user interface. The availability of the toolbars and their options is dependent on the options your administrator has enabled.

Brava! Task Bar



Viewing Tools and Page Control



Search

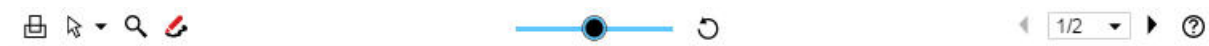


Markup Properties Toolbar



Annotate Toolbar	Redact Toolbar

Simple View Toolbars:



Navigating the Viewer

Brava! Task Pane

The Brava! Task Pane can be toggled open or close by clicking on the centered arrow of the bar on the right side of the viewing window.




The tabbed panels available in Brava! HTML Viewer include:



Thumbnails
Bookmarks - displays only when bookmarks are present
Changemark - displays only when Changemark notes are present
Verify Redactions - displays only when redactups are present
Checkviews - displays only when Checkview tags are present

Page Thumbnails

The Thumbnails tab  reveals a scrollable thumbnail navigation panel. When clicked, the pages of the currently opened file appear in the panel as small clickable thumbnail images.

Pages containing markups will appear with a red markup indicator icon (!) on the right edge of the thumbnail image.

For large documents, using the scroll bar to navigate down the list of thumbnail images will pause the sequential loading process. Loading will continue on the page you scroll to. This allows you to scroll to any page thumbnail in a large document without having to wait for all page thumbnails to finish loading sequentially.

The thumbnail panel contains 4 navigation buttons:

First page -- Takes you to the first page.

Previous page -- Takes you to the previous page.

Next page -- Takes you to the next page.

Last page -- Takes you to the last page.



In the Thumbnail view panel, the HTML Viewer will display the (!) symbol next to each page containing existing entities regardless of whether or not it can render the entity. This serves as a notification that when exporting the file to PDF or TIFF, an [unsupported entity](#) that can't be seen may be burned in to the published file.

When viewing in [binder](#) mode, the thumbnail panel shows ALL of the thumbnails from all of the binder's documents, and the document titles and binder page numbers are shown.

Bookmarks


Internal Bookmarks

Bookmarks are placeholders that make it convenient for users to recall a previously saved zoom view or page in a document or drawing. Formats that support bookmarks in Brava! are PDF (page bookmarks) and AutoCAD (2D DWG Views).

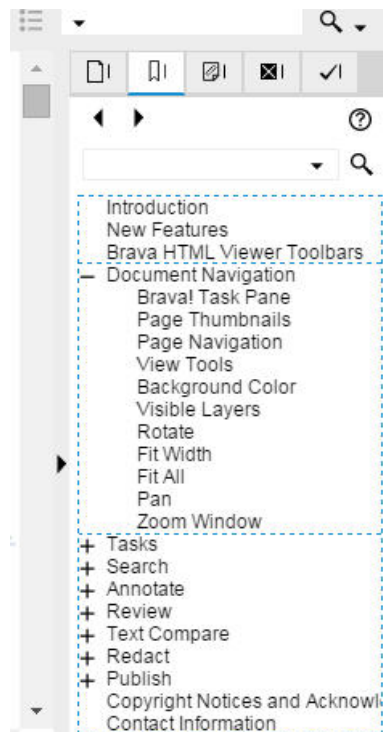
Brava! allows you to view these self-referencing bookmarks that have been previously authored in the file's native source application. These type of bookmarks that have been pre-authored in the current file being viewed are referred to as "Internal Bookmarks".

Custom bookmarks can be added to a document by using the [Bookmark](#) markup tool.

Review Bookmarks

When bookmarks are present in the currently viewed document, you can view them by opening the [Task Pane](#) and clicking the Bookmarks tab 

The bookmark panel lists only the bookmarks internal to the document being viewed.



Navigation controls

The document can be paged by scrolling using the scrollbar, scroll wheel, thumbnails or the page navigator. To move through the pages of the document using the scroll bar, slide the scroll handle up and down. To scroll using the scroll wheel, roll the wheel down to increase the page number and roll the wheel up to go to a previous page.

To use the thumbnails, activate the thumbnails panel and click on a thumbnail to view the respective page. The current page will be highlighted in the thumbnail panel.



To use the page control feature, click the down arrow and select a page number from the drop down list to change the current view to the page specified.

Use the Previous Page and Next Page arrows to navigate sequentially through the document pages.

When viewing in [binder](#) mode, the page selector shows all of the pages of all documents in the binder and includes the source document title.

Zooming

To quickly zoom in and out of the document, use the zoom slider at the bottom of the viewing window.

Moving the slider to the left will zoom out. Moving the slider to the right will zoom in.



Keyboard Navigation

Brava! HTML Viewer provides the following keystroke focus combinations for users to navigate through the viewer interface using the keyboard only.

- 1 -> top task bar
- 2 -> properties bar
- 3 -> markup toolbar
- 4 -> redaction toolbar
- 5 -> right panel
- 6 -> bottom toolbar



Notes:

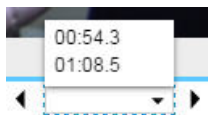
- Ctrl Key Sequences are not used for keyboard accessibility.
- Use the keyboard spacebar to activate tools.
- Use the keyboard arrow keys to traverse through sub-menus.

Timeline Slider

The video timeline frames can be navigated by using the video slider or the navigator buttons. To move through the video, slide the slider right or left to move forward or backward on the video timeline.



Markup Navigation Controls

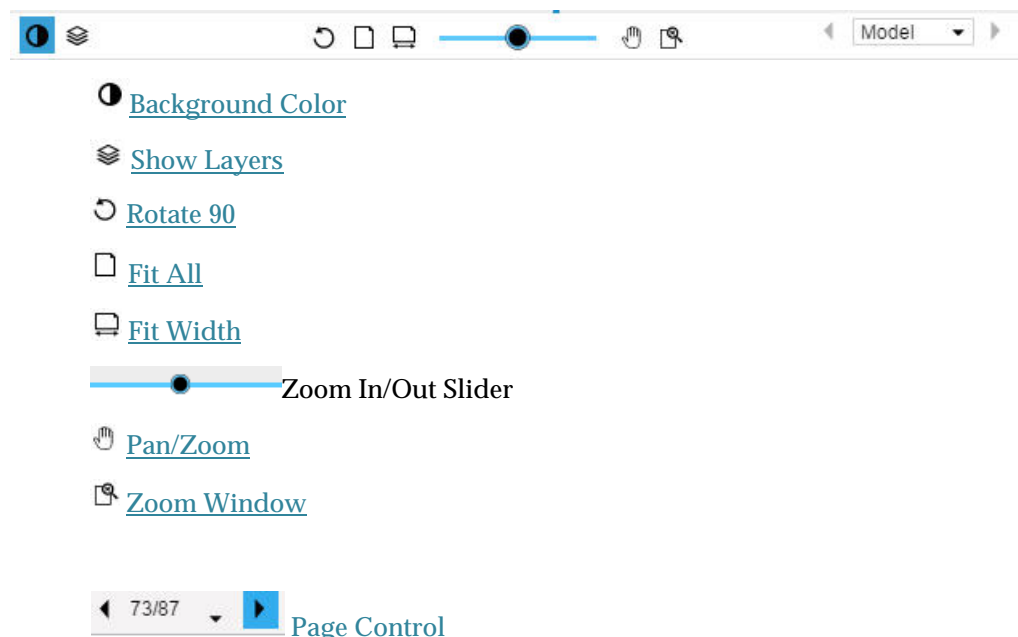


Wherever a markup exists, a time stamp is created at that point in the video. You can click the down arrow and select a time stamp from the drop down list to change the current view to the markup specified at that time tic.

Use the Previous and Next arrows to navigate sequentially through the video markups.


View Tools

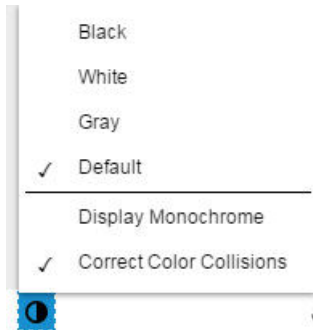
You can change the way the image displays within viewer by using the various view tools. The horizontal scroll bar contains buttons for the less frequently used display commands. From left to right, these are:



Background Color

You can change the background color of file types with "transparent" background colors, such as monochrome raster and vector file types (color raster files are not affected) to black, white, or gray. If you change the background color to the same color as the selected foreground color for monochrome images, the foreground color will automatically be changed.

To change the background color, click  on the bottom scroll bar and select **Black**, **White**, or **Gray** from the pop up menu. If you select the **Default** menu item, the Viewer will decide through driver directives which background color to use (for example, CAD file backgrounds will use black, Office formats will use white, etc.).



Display Monochrome



Important: This feature is only available in browsers that support monochrome viewing. Internet Explorer (9/10/11) and Safari browsers (below version 6) do NOT support monochrome and this feature is removed.

Monochrome Mode changes all lines of a color image to a single color (the default is black). Markup entities remain in color for quick identification.

From the Change Background Color button, select **Display Monochrome** to change to monochrome mode. Click again and de-select Display Monochrome and return to color mode.




Note: If monochrome is active, the Raster Background current color will be set to Black and will cause a monochrome raster image to display black.

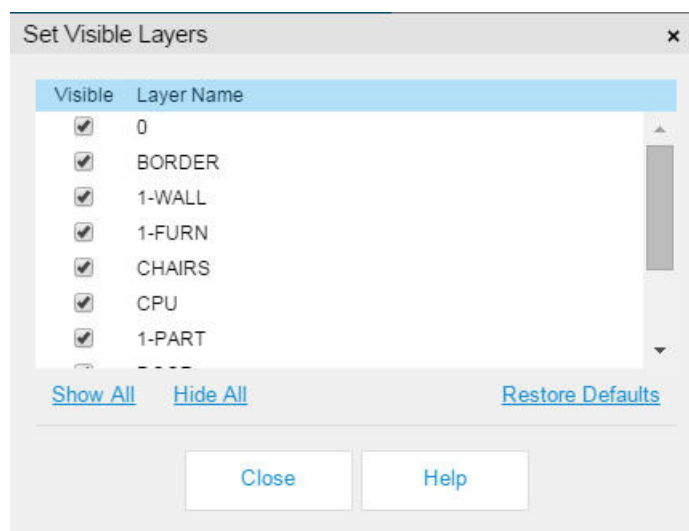
Correct Color Collisions - When changing the background color of a drawing or document's pages, it is sometimes desirable to invert foreground and background colors. Use this option to toggle whether or not to change (invert) foreground colors so that all elements remain visible when setting colliding background colors.

Visible Layers


You can turn image layers (e.g., layers of a DWG file) on or off through the *Set Visible Layers* dialog box. If no layers exist, this button is disabled.

To set visible layers on the current view:

1. Click the *Show Layers* button  on the page navigation toolbar.
2. Select the check box(es) next to the layer(s) you want to show or hide. A check mark indicates visibility is on. Click **Hide All** to turn the visibility of all layers off, or **Show All** to turn the visibility of all layers on.
3. Click **Apply** to update the image display without closing the dialog box. (You can click **Restore Defaults** to undo any changes you have made).
4. Click **OK** to update the image display and close the dialog box.



Rotate

You can rotate an image counter-clockwise in 90 degree increments. Click  on the page navigation toolbar until the page is rotated to the desired view.

Fit Width

The Fit Width command changes the zoom level so that the entire width of the document appears in the window. This is most useful to avoid having to scroll left and right to read the text.


To zoom a document to width, click  on the toolbar.

When a document is initially loaded, whether to zoom to width or zoom to extents is based on the documents dimensions. If the document is taller than it is wide (e.g., an 8.5 x 11 letter), it will zoom to width. If the document file is wider than tall (e.g., a c-size drawing) it will zoom to extents.



Note: This intelligent way of detecting the zoom level can be overridden by an administrator (via the InitialZoom setting).

Fit All


Fit All  changes the view so that the full image is visible in the window.

When a document is initially loaded, whether to zoom to width or zoom to extents is based on the documents dimensions. If the document is taller than it is wide (e.g., an 8.5 x 11 letter), it will zoom to width. If the document file is wider than tall (e.g., a c-size drawing) it will zoom to extents. Note that this intelligent way of detecting the zoom level can be overridden by an administrator (via the Initial Zoom setting).



Note: Brava! HTML viewer supports rendering of off-page annotations in single page layouts that were created with Brava! ActiveX viewer. If any of these entities exist off page, extents will adjust the zoom level to include them in the viewing window.

Pan

To pan across an image, click  on the page navigation toolbar. Note that the mouse pointer changes to a hand icon. Click and hold the left mouse button while dragging the mouse pointer in the direction you want to move the image.

As with the [Select](#) tool, hyperlinks contained in the document are recognized when moused-over and can be launched when the pan tool is active.

Zoom Window

Click  to access the Zoom Window command:

Zoom Window. You can change the zoom area by dragging a box, or window, around the area you want to zoom in on. The area within the box will fill the image window. Simply click and hold the left mouse button, then drag the mouse around the area you want to fill your viewing area.



Note: The maximum zoom level through any desktop browser is 140x.

Performing file tasks

Brava! Task Bar



The **Brava! Task Bar** contains buttons for the commonly used commands. From left to right, these are:

 [Save Markup](#)

 [Print](#)

 [Select](#)

 [Annotate](#)

 [Review](#) (markups)


 [Redact](#)

 [Publish to PDF](#) or [TIFF](#), [Export to Word](#)


When in [Annotate](#) mode, a toolbar containing the Markup Properties tools is available beneath the Brava! Task bar. A search and help button are also available in this area.

 [Search](#)

 [Markup Properties](#)

 Click on this button and then click **Help** to access this online help, or an **About** to view version information.

Printing a file

To print the open document with the default printer settings, click . Note that the print options and dialog shown is dependent on which browser you are using. See the feature availability matrix table in the next section for details.

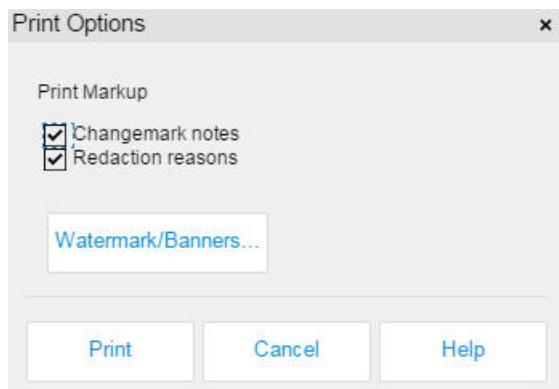
If you are viewing in [binder](#) mode, the print dialog applies only to the current page's document, and that document is reflected in the title bar of the dialog.

1. If the document contains Changemark annotations or redaction reasons, you may select to print a summary sheet of each:
 - **Print Changemark notes:** When selected, the content associated with each Changemark note will print at the end of the print job as an appended page. Only the Changemark notes that fully appear in the printed output page will appear if the page is a zoomed view only. Each note receives a unique number that can be matched up to the text printout. Printed information includes the Changemark title, author, date and time authored, and the note content.
 - **Print redaction reasons:** If redacted entities exist in the current document, and reasons have been set, you can choose to print [redaction reasons](#) summary pages. When printed, the redacted entities display text with numbered references corresponding to each reason listed in the summary page.



Note: If the browser does not support printing to PDF (see matrix below), redactions will always be finalized and the options for "Print Changemark notes" and "Print redaction reasons" will never be available.

2. Click [Watermark/Banners](#) if you would like to set or adjust the watermark or banners that will print with the current document.
3. Click the **Print** button.



Feature availability matrix

Depending on your browser configuration, the following Print features will be available in the HTML Viewer.

Browser With Acrobat Plug-In	Markups	Banners / Watermarks	Changemark Summary	Redaction Reasons	Monochrome
Internet Explorer 9/10/11	X	X	X	X	
Chrome	X	X			X
Firefox	X	X			X
Safari	X	X*			X (v.6+)

Browser Without Acrobat Plug-In	Markups	Banners / Watermarks	Changemark Summary	Redaction Reasons	Monochrome
Internet Explorer 9/10/11	X	X			
Chrome - With "Chrome PDF Viewer" Plugin	X	X	X	X	X
Chrome - No "Chrome PDF Viewer" Plugin	X	X			X
Firefox	X	X			X
Safari - With "WebKit built-in PDF" Plugin	X	X	X	X	X (v. 6+)
Safari - No "WebKit built-in PDF" Plugin	X	X			X (v. 6+)

To obtain the optimal PDF plug-in printing experience, please update your browser to the most recent version available.

***Safari Limitation:**

Problem: Banners do not appear on the printed page when using Safari browser.

Solution: The Brava! HTML Print feature in Safari is PDF-based, and prints PDFs at a scale that masks out the margins containing the banners. To resolve this known issue, set the scale to 90% in the native Safari print dialog, and banners will show up.

Downloading a file



The Download document button allows you to download the current file to a directory on your local system.

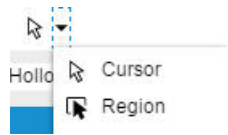
If the document path is set in the GetSignedConfig (jsp or aspx) file, and the download parameter is set to True, the Download button will be available on the HTML Viewer standard and simple interface toolbars.

Selecting document elements

The select tool  is used to pick interactive elements in a document or drawing.

With it, you can view any markup attributes (mouse over reveals attribute information (such as author, timestamp), view tooltips, sign signature elements, and launch [hyperlinks](#) contained in any hyperlinked markup entities.

You can select text contained in a document or a drawing file and copy it to the Clipboard for pasting into another application through either of the two selection methods: Region or Cursor.



Region Selection

1. Use the Region selection tool option to click and drag a selection box around the region of text you want to copy. The selection box can include as little as one letter, or as much as all of the text contained in the page.
2. In the resulting text selection box that appears, you can select some or all of text it contains. You may optionally use the **Merge Lines** button to remove the line breaks from the selected text before copying to the clipboard.
3. From the right mouse button menu, select **Copy**. You can then paste the contents of the Clipboard into another application such as Notepad or Microsoft Word. You can also use <Ctrl> + <C> to copy.
4. Click **Close** to exit and close the dialog.

Cursor Selection

Cursor selection is the more familiar selection method and allows direct selection from the currently displayed view. In IE only, the text is highlighted as you drag the selection box. Once selected, choose **Copy** from the right mouse button menu to copy the text to the Clipboard.

See Also:[Select markup](#)

Undo/Redo actions

A history stack of all document events allows you to undo-redo certain events by using undo and redo keyboard commands (<Ctrl> + <Z> and <Ctrl> + <Y>).

In addition to all annotation actions, the following redaction actions can be undone and redone:

- Find text and redact text
- Un-redact text
- Redact area
- Consolidate Markups




Note: When a "Save As" or "Consolidate Markups" command is executed, the Undo/Redo history is cleared. When the history is cleared, the Undo/Redo commands will not be available to redo or undo the last series of session events.

Searching text

Searching document text

The Search box allows you to search for text (normal phrases and text patterns) contained in a document or drawing file.



1. For a simple term search, type the word or phrase you want to search for in the search edit field.
2. For more advanced searching options, you can specify the following search preferences from the search menu (click the down arrow) .

Up - progressively searches for the previous instance in the document.

Down - progressively searches for the next instance in the document.


Match case - searches for the text exactly as typed with upper and lower case characters.

Find whole word only - finds the typed characters as an entire word as opposed to being part of a longer word. This option is disabled when *Regular Expression* is selected.


Regular Expression - if selected, the search will run using regular expressions. (No need to type *regex*: as part of the search string) If not selected, search uses classic search algorithms. See also multi-term searching below.

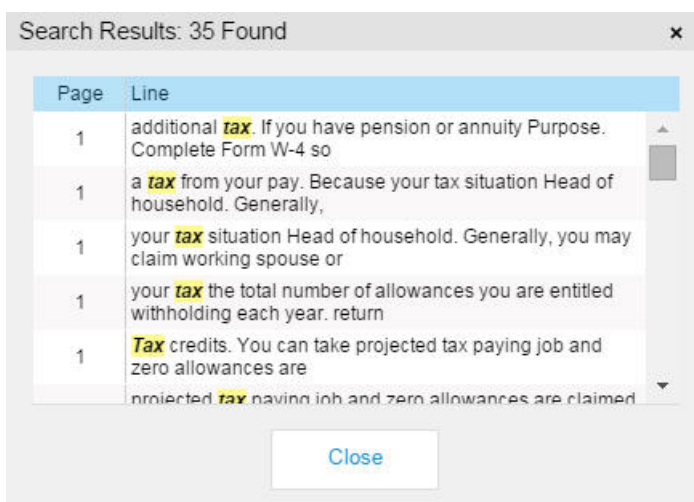
Term Hit - toggles the highlighting mode on or off for viewing found text patterns. When selected, all matching results in the current document display highlighted in yellow.

Show Results Dialog - toggles the search results pop up dialog on and off at initial search startup.

3. Click  to launch your search. Press [Enter] to navigate to and highlight the next search instance.

When the search is complete, the results can be seen in the document color-highlighted. A Search Results pop-up dialog displays each line of text and page number of the resulting instances in the document. When you click on each line in the search results box, the document will scroll to the page where the term was found and display that particular instance and the search results list dialog will be hidden.

To summon the *Search Results* dialog after performing a search, click the  button next to the search text field. You can close the dialog with the **X** in the upper right corner.



- The "x" in the right side of the search term field clears the current search results, including any highlights.
- The arrow on the left side provides a drop down pick list of recently searched. A term from this list can be selected for searching.
- When viewing in [binder](#) mode, document searches span ALL documents with a single unified search results panel.

Multi-term searching:

When the **Regular Expression** search option is on, you can input multiple search terms separated with an OR (pipe "|") symbol. For example, entering the string [Oregon](#)|[California](#)|[Nevada](#) will result in all found instances of the three separate terms to be included in the consolidated search results.













































Tip: If you are searching for a pipe character itself, the pipe must be preceded by a single backslash. Example: "\|".






A single slash is a reserved search character. When searching for words or phrases that contain a backslash character "\", you must use two slashes for each instance. Examples: Type "and\\or" to find "and\or". Type "\\C" to find "\C".

Annotating files

Markup toolbar

The **Markup** toolbar contains related groups of markup tools. To invoke the Markup Toolbar, click **Annotate ▾**. (The markup tools are only available if your Brava! Server Administrator and license allows and enables this feature.)

                    	 Markup Select		
	 Arrow Pointer		
	 Text		
	 Image		
	 Add Stamp	 Add Signature	 CAD Symbol
	 Changemark (and Changemark combination tools)		 Checkview
	 Highlight	 Cloud	 Sketch and  Sketch Polygon
	 Line		
	 Polyline		
	 Crossout		
 Scratchout			
 Rectangle  Rounded Rectangle  Polygon  Ellipse	Solid and Hollow Shapes		

	    Edit Text Entities
	 Bookmark

Markup files

Markups allow you to annotate documents without altering the document itself. All markup entities are saved in a markup file, which is associated and overlaid on the image. There can be more than one author per markup file. A new layer is automatically created for each new markup file author (determined by the login user name), allowing them to see other authors' markups, but not edit them.

You can [create](#) new markups, open an existing markup for [editing](#), [overlay](#) one or more markups on its source file for review, or permanently [publish](#) markups and redactups to PDF, or TIFF output files.

What do you want to do?

- [Create a markup file](#)
- [Open a markup file for editing](#)
- [Overlay a markup file for review](#)
- [Close a markup file](#)
- [Save a markup file](#)
- [Publish a file with markups/redactups](#)
- [Consolidate markups](#)
- [Change markup ownership](#)

Creating annotations with Brava! provides the following benefits:

Original Files Untouched - Original files remain untouched so whether annotating, redacting, or just viewing, the source file remains safe in the repository; annotations are saved as a separate, overlaid XML file.

Secure & Trackable - Each annotation entity is marked with the creator's username, date and time. Users cannot edit other user's annotations.

Concurrent Annotations - Each reviewer can create a separately managed annotation file, supporting permission roles and allowing multiple users to comment on the same file at the same time.

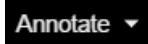
Annotations Saved as XML - Annotations are saved in a non-proprietary, open XML format, permitting import/ export of annotations and pre/post processing as an integral part of a workflow.

Burn-In - Annotations can be burned into a PDF "copy" of the original file, making it easier to email files with notes to suppliers or customers.

Stamps - Add stock stamps like Approval, Rejected or Cancelled, or create custom stamps. Like all annotation entities, stamps record the creator's username, date and time.

Creating a markup file

To enter Annotate mode and create a new markup file with Brava!:

1. Click  and then click **New** from the drop down.
2. Select the desired markup tool from the [Markup Toolbar](#). Note that markup entities must be placed within a single page limit and cannot span multiple pages.
3. Once created, you can [save](#) your markup layer to be reviewed with the current file and/or [publish](#) the file as a new rendition in PDF or TIFF with the markup layer permanently overlaid.

Saving a markup file

Markup files are saved as XRL files.

1. Once you have [created a markup](#) layer, click  on the task bar to summon the *Save As* dialog. You can also summon a markup Save dialog by clicking **Annotate** and selecting **Save** or **Save As**.
2. Type a file name in the text box and click **OK**.



Usage Notes

- If markup entities are created or changed on the currently open file, and you attempt to leave annotation mode at any time before saving those markups, a prompt displays asking if you would like to save the markup file.
- Brava! HTML viewer cannot open older version markup files which were created with Brava! Enterprise versions prior to version 7.1.1. This includes opening markups created in Brava! Desktop 7.1.0, Brava! ActiveX viewer 7.1.0, or older. Markups created in previous versions of the HTML viewer should open without issue.
- Admins - note that changing any settings in the *server_precedence.properties* file has no affect on the HTML viewer (only used for the activeX viewer).

See Also:

[Publishing Markups](#)

[Consolidating Markups](#)

[Changing Markup Ownership](#)

Closing a markup file

To close the currently active markup file:

1. To close an editable markup, click **Annotate** and select **Close** from the drop-down menu. You will be prompted to save the file before closing if the markup has not been saved yet or if changes have been made since the last save action.
2. To close markup files that are opened for review, select **Close Review** from the **Review** button drop down and select the overlaid markups in the list that you want to close. If only one markup is opened for review, it is automatically closed. No markup list will appear.

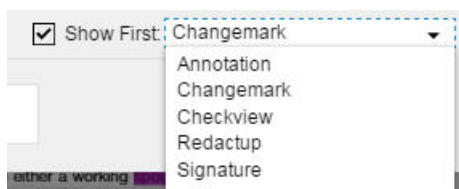
Markups that have been [published](#) can never be opened or closed. They are permanently embedded into the published PDF or TIFF rendition.



Editing a markup or Redactup

You can edit (if you are the author) markup entities in the active (editable) markup file. You can create new markup entities or use the [Select Markup Tool](#) to select existing entities to resize, reshape, move, or delete. The Select Markup tool must be active when selecting and editing markup entities.

To open a markup file for editing:

1. With a document file opened in Brava! HTML client (that has markup files associated that you have previously authored), click **Annotate** and select **Open....**
2. From the *Available Markup Files* dialog, select a previously authored markup file you want to open. There can only be one markup file open for edit at a time. If a markup file is currently open, it is closed (with prompt to save if changes have been made) and the selected file is opened.
3. Select the **Show First** check box and select an option from the drop-down if you would like the viewer to automatically pre-load the first instance of this option when the markup is loaded (forwarding the document to that page). For example, if you only want to review signatures, and the first signature is on page 10 of the document, selecting the *Signature* option will load the markup file beginning with the signature item located on page 10.



4. Click **Close**.
5. Click  on the **Markup** toolbar.
6. Click on the markup entity you want to edit.
7. Edit the markup/redactup entities as desired. You can move, resize, delete, copy, or reshape entities.
 - Hold the left mouse button down on any of the 8 resize handles (to resize), or on the entity itself (to move), and then drag and release the mouse to set the new position.
 - To **delete** the selected entity, press <Delete>.
 - To **rotate** the selected entity, click near the green handle in the center of your entity. Drag the mouse in the direction you want to rotate and release the mouse button to set the entity. For finer tolerance, the further away from the center the mouse is, the finer grained control you will have in rotating the entity.
 - To **change the shape** of a selected line or polyline entity, click on one of the independent edit handles (white boxes) or anchor points (black dots) and drag in any direction.
 - To **change the color** of the selected entity, choose a new color from the markup or redactup properties [color menu](#). Note that if a redactup entity color is tied to a redaction reason via a custom [redaction reasons](#) JSON file, the color will not be editable.
 - To [Copy](#), Paste, Duplicate, or Delete an entity, select the desired command from the right mouse button menu.
 - You can change selection of additional [markup properties](#) from various drop down selection boxes, such as line width, line styles, fill type, etc.
 - To add a [hyperlink](#), select the markup entity, click the add hyperlink button  from the markup properties, and type a URL from the hyperlink text box.

- To edit a [Changemark note](#)'s text, editing must be done to the Changemark entity itself. The text cannot be edited directly in the Changemark note List pane. You can also add a [reply](#).
 - To edit a [Markup Text](#) annotation, double click on the entity and edit the text contained in the *Text Annotation* dialog's text field.
8. To close a markup file, click **Annotate** and select **Close**. If you have made changes to the markup file, you are prompted to save those changes.

Copying a markup entity

You can select and copy one or more editable markup entities to the Clipboard through the right mouse button menu command. With the [select markup](#) tool active, click and drag a box around adjacent entities to select multiple markup entities.

Click the right mouse button over a single or multiple entity selection and click **Copy** from the pop up menu. You can then **Paste** the markups into the same page or any other pages of this or any other Brava! HTML session window that you have open.

Copy	Ctrl+C
Duplicate	Ctrl+D
Cut	Ctrl+X
Paste	Ctrl+V
Delete	Delete

You may also select **Duplicate** to create a duplicate of the selected entity or entities, or use **Cut/Paste** rather than Copy/Paste to move an entity or group of entities.

Entities that cannot be copied include [Changemark notes](#) that contain one or more replies and [Checkview](#) entities.

When reviewing in [binder](#) mode, markup entities can be copied and pasted across all documents in a binder.

Note that a separate undo needs to be performed for each entity copied into each document page if you change your mind. Once copied, all entities behave as individual entities. In other words, changes made to a copied entity on one page have no impact on any of the entities contained in other pages.

See Also:

[Creating Markups](#)


Changing markup ownership

If this feature is enabled by your administrator (via a server parameter `EnableMarkupChangeOwner`), you can take ownership of a markup entity owned by another author.



Note: When viewing in [binder](#) mode, markup ownership changes are applied across ALL documents.

To change markup ownership:

1. [Open](#) a markup for edit that contains markup entities created by other authors.
2. With the Select Markup tool active , hold down the <Shift> key and click on a single markup entity. Use <Ctrl> + click or meta key to change ownership on multiple markup entities.
3. The author information for that entity changes to your information.
4. Edit the entity as desired as you are the new owner.

This feature is only functional on markup entities in markups currently open for edit.


Consolidating markup files

If this feature is enabled by your administrator (via a server parameter), you can transfer all open markup entities into one new consolidated markup file.



Note: When viewing in [binder](#) mode, markup consolidation changes are applied across ALL documents.

To do this:

1. Click .
2. Select the markup files you want to consolidate. You must open at least two markups to use this feature.
3. Click **Annotate** and select **Consolidate Markups**
 - A new markup file is created for edit, and all of the markup entities in the markups selected for consolidation are copied to this new markup file. All markup files that were opened for review are closed after the command is executed. The entities in the consolidated file retain their original author information and [ownership](#) does not change by default.
 - If any markup entities exist that have been published to the file (burned in), they are not included in the consolidated markup.
4. [Save](#) the current consolidated markup. The consolidate command cannot be undone, however, you can close the markup opened for edit and choose not to save the consolidation.



Note: Executing a Consolidate Markups command clears the [Undo/Redo](#) event history.

Publishing a markup file

You can [publish](#) markups with any native files and output to PDF and TIFF format. This means that when the publishing action completes, the markups and resulting redactions, as well as the currently set banners and watermarks are burned into the newly created PDF or TIFF rendition and can never be closed or edited.

To publish markups:

1. Open a file and [create a markup](#) layer. You may also open one or more markup layers [for review](#).
2. Click **Publish** on the task bar and select PDF or TIFF.
3. All currently opened markup layers are permanently published with the file's content. When a user opens a file that has been published with markups, both the markups and document are automatically visible.
4. To publish Changemark notes text from markup files associated with .DOCX source files, select [Export to Word](#) from the *Publish* menu. [Highlight Text with Changemark Note](#) information is inserted into the published .DOCX file as Word comments.



Notes:

- Brava! HTML viewer supports rendering of off-page annotations in single page layouts that were created with Brava! ActiveX viewer. If any of these entities exist in the current markup file, outside of the page extents, they are not included in the published file.
- If you are viewing in [binder](#) mode, the publish options dialog applies only to the current page's document, and that document is reflected in the title bar of the dialog.

Brava! ActiveX markup compatibility

Brava! HTML Viewer supports a limited subset of annotations created with the Brava! ActiveX product line (Brava! Enterprise ActiveX Client, Brava! Desktop). Supported entities can be opened for edit (if you are the author) or for review in Brava! HTML. Additional markups can be created and saved in Brava! HTML viewer as a new markup file, which can then be loaded in any Brava! ActiveX product (Brava! Enterprise, Brava! Desktop, or Brava! Reader), if desired.

Supported annotations that can be rendered and authored include the following:

- Changemark Notes
- Crossout
- Ellipse
- Highlight
- Raster stamp*
- Line
- Polygon
- Polyline
- Rectangle
- Cloud
- Text
- Rounded Rectangle
- Sketch
- Text Highlight
- Text Underline
- Strikethrough
- Redaction



***Important Markup compatibility note:** Existing stamp templates which contain raster images (created in previous Brava! ActiveX versions using the insert image tool) will need to be re-saved in a 7.2 or later ActiveX viewer before the HTML Viewer will be able to use them.

The following BravaX annotations can be rendered, but not authored in the HTML viewer.


- Arrow (including Byzantine)

Note that in the [Thumbnail](#) view panel, the HTML Viewer will display the (!) symbol next to each page containing existing entities regardless of whether or not it can render the entity. This serves as a notification that when exporting the file to PDF or TIFF, an unsupported entity that can't be seen may be burned in to the published file.

Using the markup tools

Select Markup Entity

The Select Markup tool allows you to select entities for edit (to move, resize, reshape, or delete).

1. Click  on the **Annotate** toolbar.
2. Once the tool is active, click on a markup entity to select it.

3. You can hold the Control button down when clicking multiple entities to add and remove them from the current selection group. See note* below.
4. To select multiple adjacent entities, click and hold the left mouse button and drag a box around all the entities you wish to select. Note that while multiple entities can be selected on the same page, multiple entities cannot be selected across multiple pages
5. To select all markup entities contained in a single page, use the combination key <Ctrl> + <Shift> + <A>.
6. [Edit](#) the entity as desired.



Note*:

Browser differences when selecting multiple markup entities

To remove a markup entity from the current group selection:

Using Chrome, Safari, or Firefox, press <Ctrl> and click the entity to be removed

Using Internet Explorer, press <Ctrl> and double-click the entity to be removed

Arrow Pointer

The Arrow Pointer tool  allows you to draw an arrow.

1. Press the left mouse button where you want the arrow point to begin, then drag and release the mouse where you want the line to end.
2. [Edit](#) the markup as desired. If the markup is not currently active, use the [Select Markup Tool](#) to pick it.
3. Select a line color, line style, and size from the [Properties](#) bar.

Arrow with Changemark™ Note



Purely for convenience, this tool allows you to create two entities at a time - a super Arrow and a Changemark™ note

1. In the [markup Properties](#) toolbar, select the color and line options to use for the arrow entity.
2. Press the left mouse button where you want the [arrow](#) point to begin, then drag and release the mouse where you want the line to end.
3. A [Changemark](#) entity is created at the tail end of the arrow.
4. Enter the Changemark text as you would do for any independent Changemark note.
5. Once placed, the two entities behave totally independent of each other, as two separate entities.

The new Changemark note and Arrow can be moved, resized, or deleted independently, and you can use the [select markup](#) tool to select and edit either of the entity's properties.

Markup Text

Click **A** on the **Markup** toolbar to place text directly on the image (as opposed to in a Changemark annotation).

1. Click on the document in the location where you would like the text to begin, or drag a rectangle where you would like the text area to be located.
2. Type or paste copied text into the *Text Annotation* dialog that appears. Press <Enter> at the end of each line if you would like to enter multiple lines of text rather than have the text appear as one long string. Click **OK**.
3. From the Markup [Properties](#) bar, select the desired font properties. You can [edit](#) the markup as desired. You can change the [font](#), style, [size](#), color, and [background](#) of the markup text box.



4. If the markup is not currently active, use the [Select Markup Tool](#) to pick it (single click). Note that markup text can only be selected and edited when the Select Markup Tool is active.
 - You can press the left mouse button and drag the text box to another location and you can adjust the font size using the drop down control on the Markup Properties bar.
 - To edit the text, with the Select Markup tool active, double-click on the text annotation and edit the text that appears in the markup text dialog.
 - To rotate the text, select the entity then click and drag the green rotation handle in any direction. For finer tolerance, the further away from the center the mouse is, the finer grained control you will have in rotating the entity.

See Also:

[Markup Text Background](#)

[Markup Font/Size](#)

Markup Text tool

Markup Text

Click **A** on the **Markup** toolbar to place text directly on the image (as opposed to in a Changemark annotation).

1. Click on the document in the location where you would like the text to begin, or drag a rectangle where you would like the text area to be located.

2. Type or paste copied text into the *Text Annotation* dialog that appears. Press <Enter> at the end of each line if you would like to enter multiple lines of text rather than have the text appear as one long string. Click **OK**.
3. From the Markup [Properties](#) bar, select the desired font properties. You can [edit](#) the markup as desired. You can change the [font](#), style, [size](#), color, and [background](#) of the markup text box.



4. If the markup is not currently active, use the [Select Markup Tool](#) to pick it (single click). Note that markup text can only be selected and edited when the Select Markup Tool is active.
 - You can press the left mouse button and drag the text box to another location and you can adjust the font size using the drop down control on the Markup Properties bar.
 - To edit the text, with the Select Markup tool active, double-click on the text annotation and edit the text that appears in the markup text dialog.
 - To rotate the text, select the entity then click and drag the green rotation handle in any direction. For finer tolerance, the further away from the center the mouse is, the finer grained control you will have in rotating the entity.

See Also:

[Markup Text Background](#)

[Markup Font/Size](#)

Markup Font

Change the font name, style, and size for markup text through markup properties tools. To change the markup text font:



1. Select your desired options from the text properties toolbar. You can select the font name, size, and color. Use the **B**, **U**, and **I** buttons to apply Bold, Underline, and Italics to the font. The [markup text background](#) button **T** allows you to show the markup entity text box with transparent or filled background, or choose a custom color to use.
2. Click on the document where you would like to place the text and enter or paste text into the Text Annotation dialog text field.
3. Click **OK**.

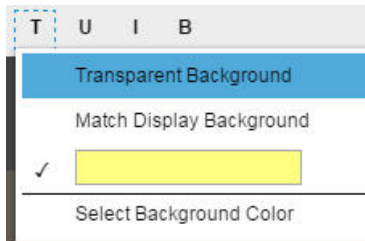
Text annotation size: Font size values are a scale factor relative to the actual size of the document or drawing currently being viewed. This scaling allows the same font size value to work similarly in documents that are 8.5 x 11 inches and drawings that may be 200 miles wide in world-space height.



Note: The Underline text annotation feature is not available in Firefox due to a browser limitation.

Markup Text Background

When the [Markup Text](#) tool is active , you can select the text box background type through the Markup Text Background tool  drop down menu. The following options are available:





Transparent Background - The background is transparent and all text and geometry is visible beneath the text box.

Match Display Background - This option changes the markup text background color to the file's default background color. The background is opaque and no text box border is displayed.

(Solid Color) - Displays the currently selected markup text background color (see below). When chosen, the background color is opaque with a solid border that matches the current markup text color.

Select Background Color - This option launches the markup text background color palette. You can choose a custom color from the **Color** chooser dialog. The chosen color will be used when **(Solid Color)** is selected from the tool's drop down menu.


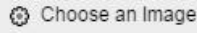
Sketch and Sketch Polygon

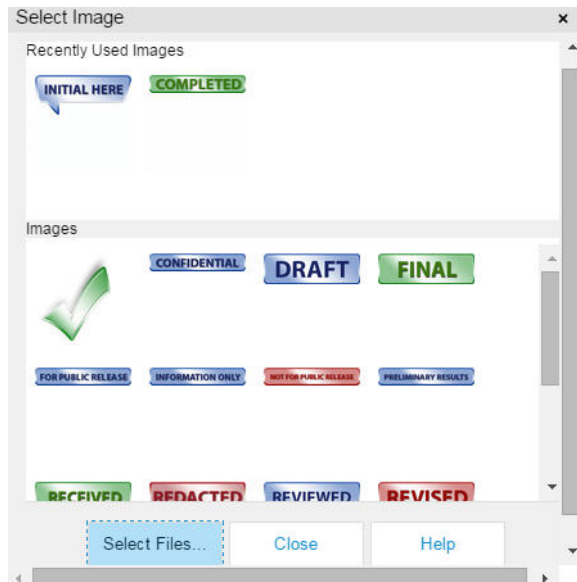
Use the Sketch  to draw freehand shapes. Use the Sketch Polygon  tool to create [filled](#) freehand shapes.

1. Touch and drag your finger to draw the shape.
2. Lift your finger to set the entity.
3. [Edit](#) the markup as desired. If the markup is not currently active, use the [select markup](#) tool to pick it. *Color*, *Line Style*, and *Line Width* are available options for the Sketch properties. *Fill Style* is also available for the Sketch Polygon tool.

Insert Image

You can use this tool to insert external images (JPG, GIF, or PNG) into your current markup or redactup layer. Once selected, images can be resized and positioned where you want them.

1. Click the Image button , then the *Choose an Image* drop down . Select an available image from the *Select Image* dialog that you would like to insert. Images are created and provided by your administrator. The list is provided by the server and the contents correspond to a raster image directory in the Brava! Server install folder.



2. In addition to server image files, you can optionally use the "Select Files" button to browse to and select a local image file to use.
3. You can set the raster image using one of the following methods:
 - a. Left-click and hold in the Brava! Window to set the first corner point of the image, drag the mouse to where you want to set the second point, and release.
 - b. Left-click on a point in the document where you want to center the image. The image is inserted into the document matching your orientation and is calculated to its natural size, relative to the document or drawing size.
4. The new entity can be [moved and resized](#) just like any other markup entity.
5. You can set multiple instances of this same image entity.
6. Recently used images will appear and persist in the top portion of the dialog for quick access.

Image special considerations

Images (JPG, GIF, or PNG files) are created in an image editor for use with the "Insert Image" Markup tool.

The following special considerations apply to the creation, use, and behavior of images in Brava:

- The image should be created in the desired size. Brava! will not scale the image. If the image is created at 2 inches by 2 inches, it will be placed at that size on either a 36" X 48" sheet or an 8.5" X 11" sheet.
- Image upload is not supported for the image tool or signature tool for Seal images when using Internet Explorer version 9 (IE9).
- Once created, the image files must be loaded to the server in a location available to the Job Processor.
- Black and white images have special behavior when viewed in Brava:
 - If an image is "black" and "white" only, the black pixels are drawn with the entity's current color and white pixels are drawn transparent.
 - What determines whether or not an image is considered color or black and white? Brava! examines every pixel to determine if they are 0,0,0 (black) or 255,255,255 (white). The test has a tolerance of 60, meaning that a pixel is considered black if all of its values are within 0 to 60. A pixel is considered white if its values are all within 195 to 255.
 - If an image contains a third color, outside of the black/white tolerance, all colors are drawn opaque.

Markup Stamp

A Stamp is a single or group of markup entities, defined by an author as a "stamp". The stamp template can contain any of the available markup entities, including dynamic text (similar to banner strings) that update when a user adds the stamp to a markup layer that is open for edit.


If Stamps have been authored and saved to the database server, the Add Stamp button is available for use on the Markup Toolbar. Stamps are created and provided by your administrator. The list is provided by the server and the contents correspond to a raster image directory in the Brava! Server install folder.



The stamp is treated as a group and all elements of the template are resized and moved as a single entity and cannot be edited otherwise. Color, content, and other elements are defined by the author when a stamp template is created and saved.

The markup attribute author name and date is replaced with the name of the current user inserting the stamp and date of insertion (visible on mouse float-over).

When a stamp is inserted, if a dynamic text field or [token](#) (such as %Page, %Date, %dbstring(value), etc.) exists, the field is resolved and results are populated in the stamp. You can insert multiple stamps into a markup layer.

To add a Markup Stamp:

1. While a markup layer is open for edit, click the Add Stamp button  on the [Markup Toolbar](#).

2. Click the Choose a Stamp icon  Choose a Stamp . When clicked, all available stamp images appear in the dialog that can be selected and added to the current markup layer.
3. To place the active stamp at its *default size*, left click on the view window. The location you click is the center point of the stamp.
4. To insert the stamp at a *customized size*, left-click an area of the current window and, while holding down the mouse button, drag a box to position and size the stamp entity. Release the mouse button to set the entity.
5. You can use the re-size or rotate handles to [change the shape and position](#) of the stamp.
6. Once a stamp is added to a markup layer, the stamp name can be selected from the Recently Used Stamps list of the Select Stamp Template dialog. The active stamp is drawn when you click and drag on the viewing window. Stamps can be created on any page of a multi-page document and can be copied and pasted to any page.
7. Add any additional markup entities (including stamps) you desire and click  to [save your markup](#). The stamp entities are saved with the markup layer just as any other entity.

Stamps created in one file format should only be applied to files of the same format type or the scaling of the stamp will be off in relation to the document. It is recommended that when stamps are created, that their name be appended with their file type for identification. For example, a stamp created on a PDF document might be named *template1_pdf.xsp*.

Important Markup compatibility note: Existing stamp templates which contain raster images (created in previous Brava! ActiveX versions using the insert image tool) will need to be re-saved in a 7.2 or later ActiveX viewer before the HTML Viewer will be able to use them.

See Also:

[Insert Image Tool](#)

[Signature Tool](#)

CAD Symbol



This markup tool presents a tree-view organized collection of different CAD symbols that can be added to the markup layer.

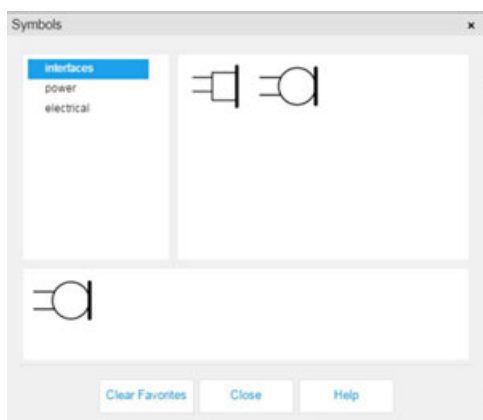
These symbols are generated and provided by your administrator. The list is provided by the server and the contents correspond to the symbols directory in the Brava! Server install folder.




Administrators note: The HTML viewer ships with a utility found in the /config/utility directory called "catalog.js" that will create a JSON catalog of available symbols that are present in a specified directory. Please see the BravaSDK integration documentation for information on how to use the catalog.js file.


To add a Markup Symbol:

1. While a markup layer is open for edit, click the Symbol button  on the [Markup Toolbar](#).
2. Click the **Choose a Symbol** icon . When clicked, all available symbols appear in the Symbols dialog in an organized hierarchy that can be selected and added to the current markup layer. The contents of the currently loaded catalog display in the symbol dialog as PNG preview images until the associated [stamp template](#) is selected for use.



3. To place the active symbol at its *default size*, left click on the view window. The location you click is the center point of the symbol.
4. To insert the symbol at a *customized size*, left-click an area of the current window and, while holding down the mouse button, drag a box to position and size the symbol entity. Release the mouse button to set the entity.
5. You can use the re-size or rotate handles to [change the shape and position](#) of the symbol.
6. Once a symbol is added to a markup layer, the symbol name can be selected from the favorites list of the Symbols dialog.
 - The active symbol is drawn when you click and drag on the viewing window.
 - Symbols can be created on any page of a multi-page document and can be copied and pasted to any page.
 - To clear the list of Favorites (recently used symbols), click the **Clear Favorites** button.
7. Add any additional markup entities you desire and click  to [save your markup](#). The symbol entities are saved with the markup layer just as any other entity.

Cloud

You can draw clouds using the Cloud  tool.


1. Click and hold the left mouse button and drag the mouse pointer on the image to draw a cloud shape.

2. Release the mouse button to set the entity.
3. [Edit](#) the markup as desired. If the markup is not currently active, use the [Select Markup Tool](#) to pick it.

Markup Highlight



Creates highlight entities by having the user draw a rectangle anywhere on the current file.

Unlike the filled shape entity, which can be set to highlight, filled or hollow, the "highlight" entity is only a highlight. Color options can be selected as with any other markup entity. The entity created with the highlight tool is essentially the same as creating rectangle entity  with a highlight fill, but there is no option to select or edit the fill type for highlight.

See Also:

[Highlight Properties](#)

Highlight with Changemark™ Note



Purely for convenience, this tool allows you to create two entities at a time - a Highlight and a Changemark™ note

1. Click on the area you want to [highlight](#) and drag your mouse to the point where you want to stop.
2. When you release the mouse button, a [Changemark](#) entity is created outside the upper left corner of the highlight rectangle.
3. Enter the Changemark text as you would do for any independent Changemark note.
4. Once placed, the two entities behave totally independent of each other, as two separate entities.

The new Changemark note and Highlight can be moved, resized, or deleted independently, and you can use the [select markup](#) tool to select and edit either of the entity's properties.

Note that the [color](#) selection in the properties bar applies to the Changemark comment only. The default color used for the highlight is yellow, but the entity can be selected (with the [Select Entity](#) tool) and edited to an alternate color, after initial placement.

Highlight Text with Changemark™ Note



Purely for convenience, this tool allows you to create two entities at a time - a Highlight Text and a Changemark™ note

1. In the [markup Properties](#) toolbar, select the color to use for the Highlight Text entity.

2. Click on the text you want to highlight and drag your mouse to the point where you want to stop.
3. The selected text appears highlighted until you release the mouse button - at which point the text highlight displays and a [Changemark](#) entity is created in the upper left corner of the [highlighted text](#).
4. In the Changemark dialog, enter the text as you would do for any independent Changemark note.
5. Once placed, the two entities (Highlight Text and Changemark note) behave totally independent of each other, as two separate entities.
6. The [Export to Word](#) feature is supported when using the Highlight Text with Changemark note tool and text can be inserted into the resulting DOCX file as Word Comments.

The new Changemark note and Text Highlight can be moved, resized, or deleted independently, and you can use the [select markup](#) tool to select and edit either entity's properties.

Strikethrough with Changemark™ Note



Purely for convenience, this tool allows you to create two entities at a time - a text [strikethrough](#) and a Changemark™ note.

1. In the [markup properties](#) toolbar, select the color to use for the text strikethrough entity.
2. Click on the text you want to strike through and drag your mouse to the point where you want to stop.
3. The selected text displays with a strikethrough and a [Changemark](#) entity is created in the upper left corner of the text.
4. Enter the Changemark text as you would do for any independent Changemark note.
5. Once placed, the two entities behave totally independent of each other, as two separate entities.

The new Changemark note and strikethrough can be moved, resized, or deleted independently, and you can use the [select markup](#) tool to select and edit either of the entity's properties.

Cloud with Changemark™ Note



Purely for convenience, this tool allows you to create two entities at a time - a Cloud rectangle and a Changemark™ note.

1. In the [markup Properties](#) toolbar, select the color and line options to use for the cloud entity.
2. Click and hold the left mouse button and drag the mouse pointer on the image to draw a [cloud](#) shape.

3. Release the mouse button to set the entity and a [Changemark](#) entity is created in the upper left corner of the [cloud](#).
4. Enter the Changemark text as you would do for any independent Changemark note.
5. Once placed, the two entities behave totally independent of each other, as two separate entities.

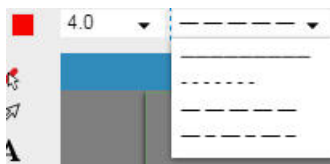
When using the single click placement, the existing default size of the Changemark note will be shrunk to fit inside of the cloud entity if its size is larger than the cloud entity that you set.

The new Changemark note and cloud can be moved, resized, or deleted independently, and you can use the [select markup](#) tool to select and edit either of the entity's properties.

Straight Line

The Line tool  allows you to draw straight lines in any direction.

1. If the markup is not currently active, use the [select markup](#) tool to pick it.
2. Press and hold the left mouse button where you want the Line or Arrow Pointer to begin, drag and release the mouse where you want the line to end.
3. [Edit](#) the markup as desired. The Line tool provides options for color, line style, and line width.



Polyline

The Polyline  tool allows you to draw a jointed line.

1. Click the left mouse button where you want the line to begin.
2. Move the mouse pointer to where you want the polyline's first vertex to be and click the left mouse button to set the point. Continue to left click until all points are set.
3. Double-click where you want the polyline to end to set the line.
4. [Edit](#) the markup as desired. The Line tool provides options for color, line style, and line width. If the markup is not currently active, use the [select markup](#) tool to pick it.


Crossout

The Crossout tool  is used to place an "X" over an area of the image.

1. Press and hold the left mouse button and drag the mouse pointer to draw the shape on the image.





2. Release the mouse button to set the entity.
3. [Edit](#) the markup as desired. If the markup entity is not currently active, use the [select markup](#) tool to pick it.

Scratchout

Similar to the Crossout tool, the Scratchout tool  is used to place an easily identified zig-zagging line pattern (rather than an X) through a rectangular region of an image or section of text, marking the area as symbolically invalid.

1. Press and hold the left mouse button on a starting point and drag the mouse pointer to draw the shape on the image.
2. Release the mouse button to set the entity.
3. [Edit](#) the markup as desired. If the markup entity is not currently active, use the [select markup](#) tool to pick it.

Solid and hollow shapes

The Solid Shapes group allows you to draw solid (filled) or hollow (unfilled) Rectangle , Rounded Rectangle , Ellipse , or Polygon shapes . Hollow markups render just the outline.

Select one of the above markup shapes from the [Markup toolbar](#) and select your desired options from the [markup properties](#) toolbar. Options include color and fill type (hollow, solid, highlight, or background fill).

For the Filled or Hollow Rectangle or Ellipse:

1. Press the left mouse button on a starting point and drag the mouse pointer to draw the shape.
2. Release the mouse button to set the entity.

For the filled or hollow polygon:

1. Click the left mouse button where you want to set the first vertex of the polygon.
2. Move the mouse pointer to where you want the second vertex and click the left mouse button again.
3. Set any remaining vertices, and then double-click the left mouse button at the last vertex position and Brava! automatically fills in the last line segment for you (connecting the last vertex point to the first).

[Edit](#) the markup as desired. If the markup is not currently active, use the [select markup](#) tool to pick it.

Edit text entities



You can strikethrough, strikethrough, highlight, and underline text contained in a document.

1. Select your desired edit text tool from the [Markup Toolbar](#).
2. Select a desired [color](#) to use.
3. Click on the text you want to mark up and drag your mouse to the point where you want to stop. The selected text appears highlighted until you release the mouse button - at which point the strikethrough, strikethrough, highlight, or underline markups display.




Usage Notes

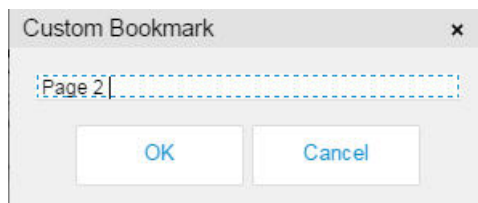
- Markup text edit entities cannot be copied and pasted.
- This tool is not available if the file does not contain selectable text.
- [Strikethrough](#) entities can be used in combination with Changemark notes.

Bookmark tool

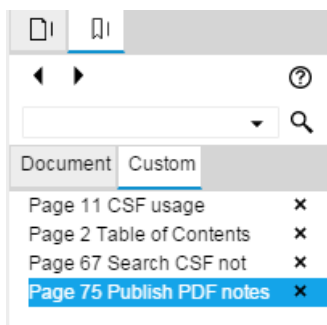


The Bookmark tool allows you to set one or more custom bookmarks in a document markup file. This tool places a page reference only and does not locate a specific word or page location. You can navigate the bookmarks by using the **Custom** sub-tab on the [Bookmark panel](#). This tab shows the new bookmarks and allows you to search, navigate, and delete (if open for edit) any bookmarks. Delete any unwanted custom bookmark in the list by clicking the x next to its name.

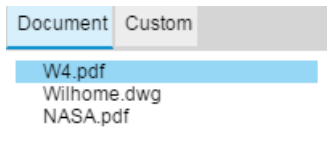
To place a custom bookmark on a page, click on a document page you would like to bookmark and then click the Bookmark icon  from the annotate toolbar. You may change the default page name to a custom bookmark name by typing in the text field. Click OK to save your bookmark in the current markup file.



Set bookmarks display in the *Custom* tab of the [Bookmark](#) panel.




When viewing in [binder](#) mode, the title of all documents in the binder appear in the Document tab.



Working with Signatures

Signature overview

The Signature feature is designed to allow the placement of user-specific markup stamps (Signature items) on documents and drawings. An Add Signature markup tool is available from the [Markup toolbar](#) for item placement .

Signature items that can be placed on documents and drawings include *Signature* images, *Initials* images, *Seal Images*, *Name* strings, *Title* strings, and current *Date*.

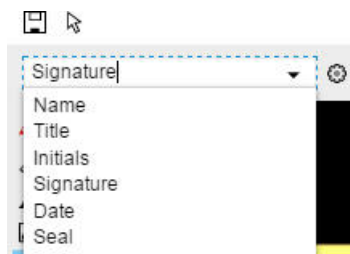


Image Files

Signature image files (PNG) can be created through the [Create](#) buttons of the signature or initial item of the [Set Signature Marks](#) dialog. Optionally, users can scan their actual signatures, crop the images, and save the file as PNG, JPG, or BMP. These image files can be placed on documents and drawings as any other [markup](#) stamp entity.



Note: Image upload is not supported for the image tool or signature tool for Seal images when using Internet Explorer version 9 (IE9).


Two signature sample.html pages are provided in the Brava! Enterprise ..\BravaSDK\HTML\samples\esig\create-signing-template\ and ... \esig\sign-document\ installation directory.

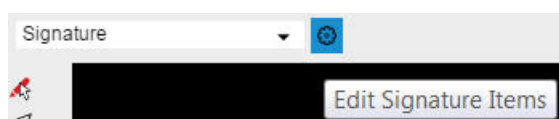
See Also:

[Signature Settings](#)

[Review Checkviews](#)

Signature settings

From the [markup](#) toolbar, click the Add Signature button  and then click the Edit Signature Items icon from the markup properties toolbar.



Before Brava! can create a signature item other than Date, that item must be set in the *Set Signature Marks* dialog. Upon selection of the signature tool for the first time, you will be shown the dialog. Before you can place one of the first three signature items, you will need to either select a personalized image file (PNG, JPG, or BMP), or create a new one. Not all fields are required to be set, but if left blank, the item in the drop down list cannot be used.

Edit Signature Items

In the *Set Signature Marks* dialog, five images and strings must be defined to be able to select the item from the *Select Signature Item Type* drop down list for placement on documents.

Name - This is a string representation of the current user's (printed) name.

Title - This is a string representation of the current user's (printed) title.

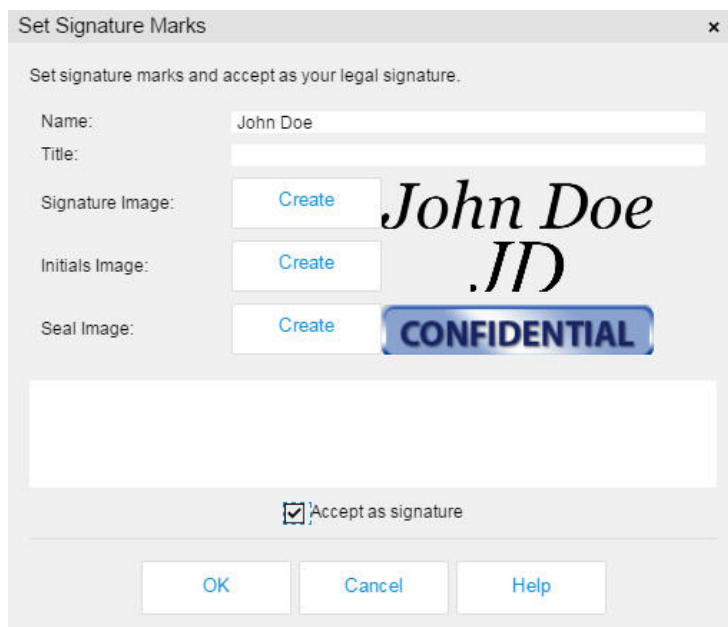
[Create a signature image](#) - This is an image representation of the current user's signature.

[Create an initials image](#) - This is an image representation of the current user's initials.

[Create a Seal image](#) - This is an image representation of the current user's seal.

Date - No manual setting required, this signature item is the month, day, and year (locale appropriate) at the time the item is created.

The acceptance clause cannot be edited by end-users. Selecting to 'Accept as signature' is required before OK becomes enabled, the item is set, and the signature can be used as a markup entity.



Set Signature Marks

Set signature marks and accept as your legal signature.

Name: John Doe

Title:

Signature Image: [Create](#) *John Doe*



Initials Image: [Create](#) *JD*

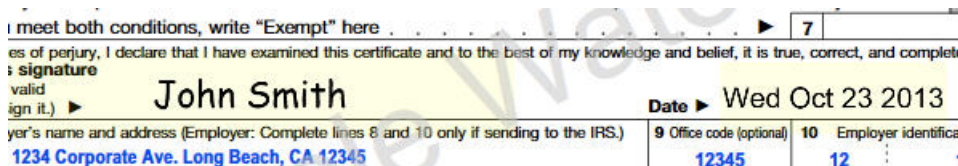
Seal Image: [Create](#) **CONFIDENTIAL**

☒ Accept as signature

OK Cancel Help

Place Signature Items

1. Creates one or more signature markup entities, selecting a type for each (see "Types" below).
2. Once created and set in the *Set Signature Marks* dialog, these images and strings (including the current date string) can be placed on documents as any other [markup](#) entity. Select an item type from the list and drag a rectangle on a document for placement. Once placed, the signature item shows on the document and can be selected with the markup select tool  to move, delete, or rotate until the item is set. You may also choose to add a hyperlink to any signature entity as with any other Brava! annotation by clicking the hyperlink button .
3. At this point you can either save the markup file and give to someone else to sign OR you can set up your own signature marks: using the [Select](#) tool, click on each entity to sign. The [Checkview](#) tool can be used by reviewers to ensure documents or forms are completed with required signature information.



meet both conditions, write "Exempt" here

es of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete

signature

valid

sign it.) ▶ **John Smith** **Date ▶ Wed Oct 23 2013**

yer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.)

1234 Corporate Ave. Long Beach, CA 12345

9 Office code (optional)	10 Employer identifica
12345	12

Types: Changing the value of the drop-down box changes the type of item that will be created by the mouse tool. If a type is selected but has not yet been given valid item data, the *Set Signature Marks* dialog displays (with the cursor positioned in the requested item type edit box). If the *Set Signature Marks* dialog is dismissed without having been provided the required item data, the system will automatically set the current signature type to Date.



Change Current Settings

To change the currently set item data, click the Signature Items arrow and adjust the desired items to choose or create a different file, or edit the Name or Title strings. Click OK to save your changes.



Usage Notes:

- The system has no way to determine or enforce the actual content of the signature item data. Any valid raster file will be accepted for items that require a file, and any single line of text will be accepted for items requiring a string.
- If the files used and persisted for Signature Image, Initials Image, or Seal Image are moved, deleted, or become otherwise unusable, the system will automatically bring up the Edit Signature Items dialog the next time there is attempt to place that item.

Signature creation

The signature item is an image representation of the current user's signature.

To set a personalized signature item:

1. Click the *Create* button to create a new signature image item.
2. In the *Signature Creation* dialog, select an available font name from the drop down list. Only True-Type fonts available on the user's system are listed, with "Script" or "Hand" types of fonts listed first.
3. Enter your signature in the input field below as you would like it to appear on documents and drawings. A preview of how your signature item will appear displays in the bottom area as you type.
4. Click OK to close the *Signature Creation* dialog.
5. The new image preview displays in the [Set Signature Marks](#) dialog.
6. If approved, select the *Accept as signature* check box to enable the OK button and save your settings.



Once the data is set, the signature item type can be changed by using the *Select Signature Item Type* drop down list. The tool is now ready to place signature items on documents and drawings.

Initials creation

The initials item is an image representation of the current user's initials.

To set a personalized initials item:

1. Click the *Create* button to create a new initials image item.
2. In the *Initials Creation* dialog, select an available font name from the drop down list. Only True-Type fonts available on the user's system are listed, with "Script" or "Hand" types of fonts listed first.
3. Enter your initials in the input field below as you would like it to appear on documents and drawings. A preview of how your initials signature item will appear displays in the bottom area as you type.
4. Click OK to close the *Initials Creation* dialog.



The new image preview displays in the [Set Signature Marks](#) dialog. If approved, select the *Accept as signature* check box to enable the OK button and save your settings.

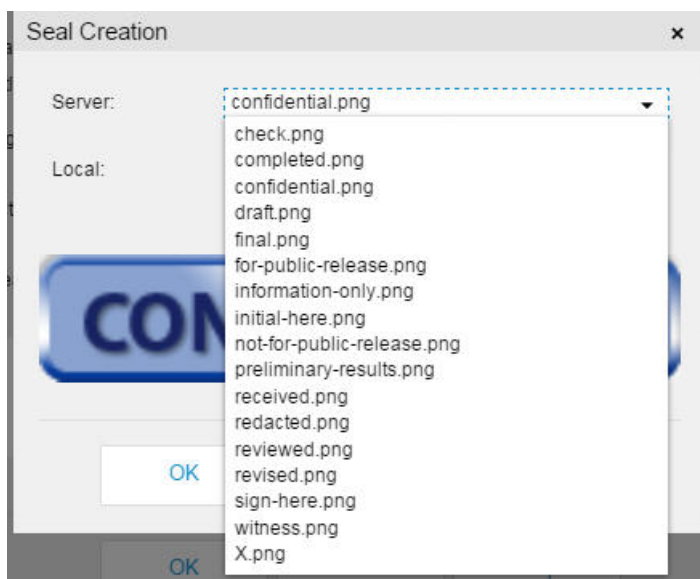
Once the data is set, the signature item type can be changed by using the *Select Signature Item Type* drop down list. The tool is now ready to place signature items on documents and drawings.


Seal creation

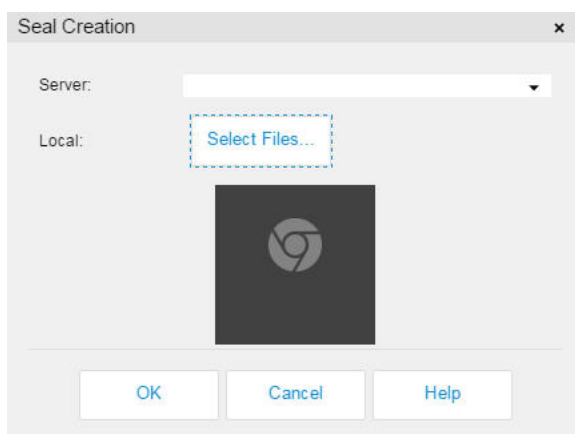
The seal item is an image representation of the current user's seal.

To set a personalized seal item:

1. Click the *Create* button to create a new seal image item.
2. In the *Seal Creation* dialog, select an available image from the **Server** drop down list. The images in this list are created and provided by your administrator. The list is provided by the server and the contents correspond to a raster image directory in the Brava! Server install folder.



3. Optionally, you can select **Local** to browse to and choose an image file (JPG, GIF, or PNG) on your local file system.  **Note:** Image upload is not supported for the image tool or signature tool for Seal images when using Internet Explorer version 9 (IE9).



4. Click **OK** to close the *Seal Creation* dialog.

5. The new image preview displays in the [Set Signature Marks](#) dialog.
6. If approved, select the *Accept as signature* check box to enable the OK button and save your settings. Once the data is set, the signature item type can be changed by using the *Select Signature Item Type* drop down list. The tool is now ready to place seal items on documents and drawings.



Working with Changemark notes

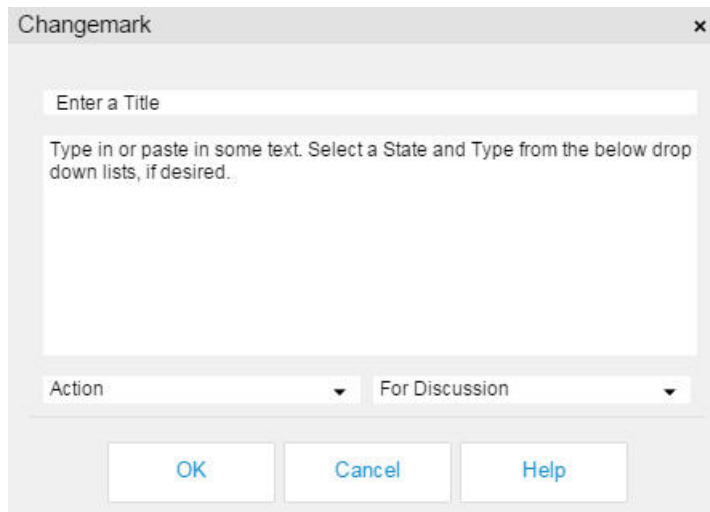
Creating Changemark™ notes

The Changemark™ feature allows authors of markups to assign a placeholder and descriptive text and/or a hyperlink to a particular markup. All Changemark notes contained in the opened markup files appear in the Review Changemark tab. This allows reviewers to step through each Changemark annotation so no comments are missed.

From the [Changemark](#) tab, Changemark notes can be [filtered](#) by content, and sorted by author, title, date, type, state, position in the document, or by number of Changemark replies. Reviewers can enter into discussions by adding their comments using the Add Reply link at the bottom of the [Changemark discussion](#) panel.

The text contained in Changemark notes and discussions on Word documents can be [exported](#) and inserted as Word comments on the published .DOCX file.

1. To enter Annotation mode, click the Annotate button  and select **New** to create a new markup layer.
2. Click  on the Markup toolbar to place a single Changemark note. (Note that additional combined Changemark tools are available from the Markup toolbar including [Cloud Changemark](#), [Arrow Changemark](#), [Highlight Changemark](#), [Highlight Text Changemark](#), [Strikethrough Changemark](#), and [Checkview](#).)
3. Draw the shape on the image by simply clicking on a location. A Changemark note of default size (50 pixels) is created at that location.



The image shows a dialog box titled "Changemark" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Enter a Title". Below this is a large text area with the instruction: "Type in or paste in some text. Select a State and Type from the below drop down lists, if desired...". At the bottom of the dialog, there are two dropdown menus. The first is labeled "Action" and the second is labeled "For Discussion". Below these dropdowns are three buttons: "OK", "Cancel", and "Help".

4. Enter the title of the Changemark note in the title text box, and then press<Tab> key.
5. Type any descriptive text necessary (this entry is optional and can be quite extensive) in the scrolling window and click **OK**. (You can also copy text from the clipboard and select **Paste** from the right mouse button menu).
6. By default, the Changemark *Type* is set to **Action**, and *State* is **For Discussion**. You can set different [Types and States](#) from the available drop down lists, depending on if and how you are using Changemark in a [discussion](#) workflow. Click **OK** to close the Changemark text dialog.
7. Click **OK** to close the Changemark note dialog.
8. You can [edit](#) the Changemark note's color, size, or position if desired. If the Changemark note is not currently active, use the [select markup](#) tool to pick it. Double-click the Changemark entity to edit its contents.

Combination Changemark Tools



When you have one of the combination " + Changemark" tools as your active tool, the behavior is as follows:

- During the time before you create an entity, the markup properties toolbar will show the properties for the soon-to-be markup entity and not the properties of the Changemark note.
- After you finish creating the markup entity, a Changemark entity will also be created automatically and selected. The properties in the markup properties toolbar will reflect the Changemark properties, not the original entity's.
- You will be prompted to fill out the text of the Changemark note, just as if you had created a single, uncombined Changemark note.
- Once placed, the original entity and the Changemark entity are NOT connected to each other in any way. You can move, resize, recolor, and delete them independently without affecting the other.

See Also:

[Reviewing Changemark notes](#)

[Filtering Changemark notes](#)

[Changemark Discussion](#)

[Editing markups](#)

[Checkview Tool](#)

[Publishing Changemark notes in PDF Files](#)

[Changemark + Cloud Tool](#)

[Changemark + Highlight Tool](#)

[Changemark + Arrow Tool](#)

[Changemark + Strikethrough Tool](#)

[Changemark + Highlight Text Tool](#)

Changemark™ discussion

The Changemark™ discussion feature adds the ability to respond to someone else's [Changemark](#) comment. When reviewing Changemark in *Edit* or *Review* mode, users can reply to any comment contained in the file and save the reply as a part of a Changemark discussion.

If the markup file being replied to has been opened for **edit**, the replies are saved in that same markup file and reviewers need to open only one associated markup to view the entire discussion.

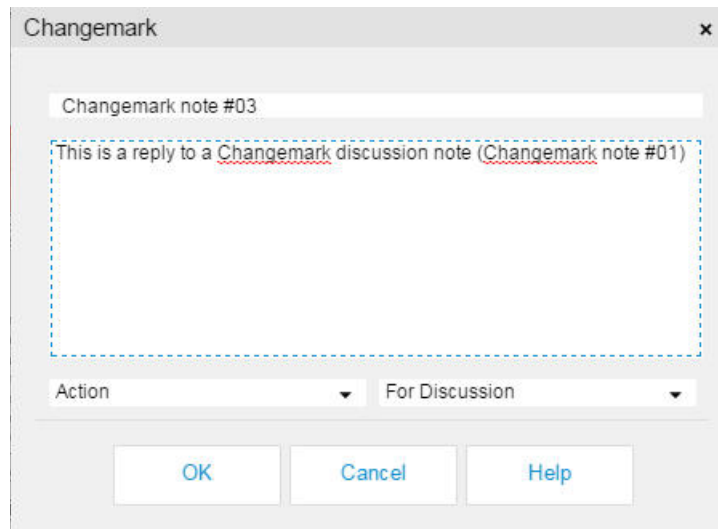
If the markup file being replied to has been opened in **review** mode, Brava! will automatically create a new editable markup layer and only the Changemark reply is saved to that new markup layer, separate from the parent markup. Reviewers will need to open both the parent markup file and all associated reply markup files that multiple reviewers have created to view the entire discussion.

Along with the text content of the note, replies added to the discussion will display the author name, time and date stamp, and the [type and state](#) assigned to that entry. When reviewing Changemark discussions, the type and state of the last entry is displayed as the current type and state at the bottom of the Changemark review panel.

To use the Changemark Discussion feature in Edit mode (recommended):

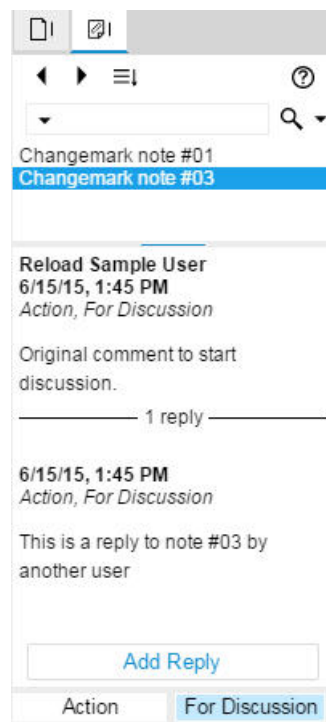
1. Open a file in Brava! that you would like to start a discussion for, or that has an associated Changemark discussion already started.
2. If you would like to start a discussion, simply create a [new markup](#) file and [add a Changemark note](#). If you would like to view and reply to an existing Changemark note, click **Annotate ->Open** and select the markup file containing the Changemark note.
3. Select the Changemark note from the Changemark list panel that you would like to reply to and click the **Add Reply** link near the bottom of the panel.

4. In the *Changemark Reply* dialog, enter your reply in the *Reply* text field and select a Type and State (optional) and click **Reply** to commit your comment to the Changemark discussion. The selected type and state is persisted during the session, but not between sessions.




The image shows a 'Changemark' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a text input field at the top containing 'Changemark note #03'. Below it is a larger text area with a dashed blue border containing the text 'This is a reply to a Changemark discussion note (Changemark note #01)'. At the bottom of the dialog, there are two dropdown menus: the first is labeled 'Action' and the second is labeled 'For Discussion'. Below these dropdowns are three buttons: 'OK', 'Cancel', and 'Help'.

5. The discussion displays in the Changemark discussion panel along with all associated replies. The type and state of the last entry display as the current status. Note that the status can only be changed by adding a new reply. A different discussion thread is kept for each Changemark note contained in the file, and all associated discussions are saved and can be accessed through the one associated markup file.



The image shows a vertical panel for displaying a Changemark discussion. At the top, there are icons for a document and a pencil, followed by navigation arrows and a search icon. Below these is a list of 'Changemark note #01' and 'Changemark note #03', with the latter highlighted in blue. The main content area shows a discussion for 'Reload Sample User' on '6/15/15, 1:45 PM' with the action 'Action, For Discussion'. It includes the text 'Original comment to start discussion.' and a separator line with '1 reply' in the center. Below this, it shows a reply from '6/15/15, 1:45 PM' with the action 'Action, For Discussion' and the text 'This is a reply to note #03 by another user'. At the bottom, there is an 'Add Reply' button and two tabs: 'Action' and 'For Discussion'.

6. If you have started or replied to a discussion in *Annotations* mode, Click  on the task bar to [save](#) the discussion as part of a new or existing markup layer. Reviewers need to only open the one markup file to view the complete discussion.

To use the Changemark Discussion feature in Review mode:

When a markup file is open for review, that means the markup is read-only and cannot be written to. Therefore, in these situations, any replies made to a review Changemark note must be made in an editable markup layer, which is created automatically and must be saved as a separate markup file. This fact changes the manner in working with Changemark discussions which is described below.

1. [Open a markup for review](#) containing a discussion you would like to reply to.
2. Select the Changemark note from the Changemark list that you would like to reply to and click the **Add Reply** link near the bottom of the panel.
3. In the *Changemark Reply* dialog, enter your reply in the *Reply* text field and select a Type and State (optional) and Click **Reply**.
4. The discussion displays in the Changemark discussion panel along with all associated replies of the review markup file. The type and state of the last entry display as the current status.
5. [Save](#) your reply as a new markup file. This file will contain only the reply objects or other markup entities that you have added and is kept as a separate markup file to the original parent markup containing the Changemark note.



Caution:

If you close review of the current file, the editable reply markup is still open and needs to be saved, even though the reply text will no longer be visible without the presence of the parent markup.

You must assign this file a different name as the file that was opened for review. Assigning the same name will overwrite all of the existing markup file data with just your reply data. For ease of identification and manageability in your workflow, a suggested naming convention for these associated replies might be `<filename>_<username>_reply<001>.xrl`

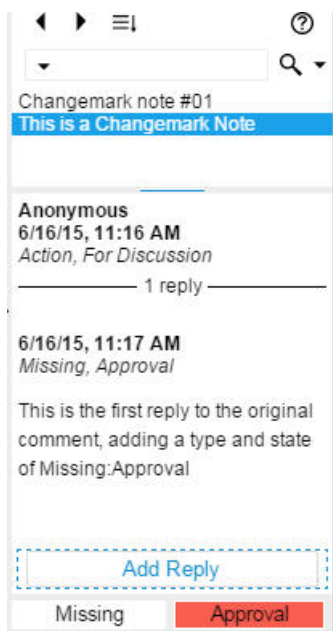
To view the entire discussion, users in your workflow will need to open the parent markup file containing the original Changemark note, as well as all associated reply markup files created by other users in review mode. If only the associated markup files are opened, without the parent, no replies will be visible and the markup file(s) will appear to be blank.

If managing multiple markups is not desirable or replies become too splintered, users can [consolidate](#) all of the reply markup files back into the one parent markup file:

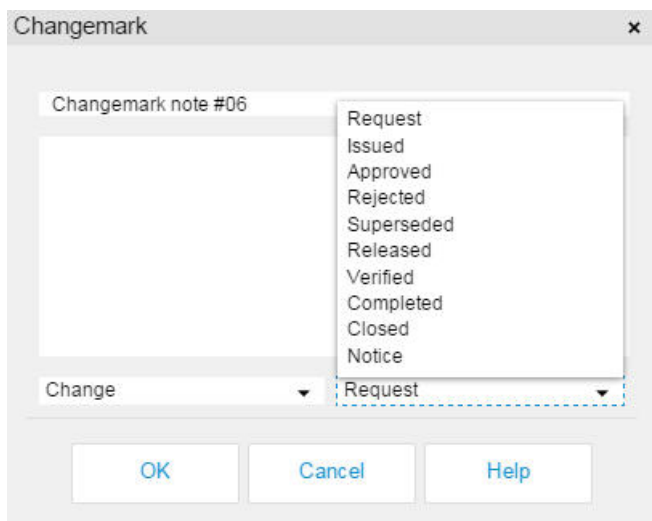
1. Open the parent markup file and all associated reply markup files in review mode.
2. Click **Annotate** and select **Consolidate Markups**.
3. [Save](#) the consolidated markup file.

Changemark™ types and states

Used in the Changemark™ Discussion panel, *Type* and *State* are attributes that can be assigned to the original Changemark content and to each reply that is added to a discussion. These *Types* and *States* are displayed for each Changemark note contained in the Changemark List, at the bottom of the panel. In a [Changemark discussion](#), only the type and state for the last entry (reply) of the discussion displays as the current Type/State. The Type/State that was assigned for each post is reflected in the text of the discussion thread, right below the author and time/date stamp.



When [creating a Changemark note](#) or replying in a Changemark discussion, drop-down lists are available for selecting the Type and State. After the *Type* is selected, the *State* drop-down will show only the States associated with the currently selected Type.



The Changemark dialog will initially select the Type/State marked as the default type in *ChangemarkConfig.xml*.

The following Types and States are set in your default installation, but these values can be customized by an administrator, by editing the *ChangemarkConfig.xml* file located on the Brava! Server in \BravaSDK\HTML\config directory. In addition, administrators can set custom colors for each entry by specifying the RGB color values for each corresponding State listed in the file. The Type, State, and color information that is defined when you create the Changemark note (or reply to a Changemark note) is saved in the markup file and can be reviewed by other users.

Type	State	RGB Value	Color displayed
Action	For Discussion (default)	193,235,255	Light blue
	An Idea	95,255,150	Light green
	Investigate	255,190,110	Orange
	Typo	255,205,160	Light orange
	Revision Error	255,250,180	Light yellow
	Confirm	180,140,200	Light purple
Change	Urgent	255,90,80	Red
	Request (default)	195,235,255	Light blue
	Issued	255,255,255	White
	Approved	95,255,150	Light Green
	Rejected	255,90,80	Red
	Superseded	0,0,139	Dark Blue
	Released	0,0,0	Black
	Verified	180,140,200	Light purple
	Completed	0,0,0	Black
	Closed	100,200,255	Blue
	Notice	0,0,0	Black
	Acceptable (Default)	95,255,150	Light Green
	Can't do	0,0,0	Black
	Carve out	255,250,180	Light yellow
Agreement	Typo	255,90,80	Red
	Discuss Further	195,235,255	Light blue
	Make Reciprocal	195,235,255	Light blue
	Reword	255,90,80	Red
	Undetermined (Default)	195,235,255	Light blue
	Critical	255,90,80	Red
	High Priority	255,230,95	Yellow
	Med Priority	255,240,215	Light peach
Status	Low Priority	195,235,255	Light blue
	Closed	0,0,0	Black
	Investigate (Default)	195,235,255	Light blue
	Pending	195,235,255	Light blue
	Working	195,235,255	Light blue
	Review	195,235,255	Light blue
	Completed	0,0,0	Black

	Closed	0,0,0	Black
Missing	Approval (Default)	255,90,80	Red
	Signature	255,90,80	Red
	Account No	255,90,80	Red
	Verification	255,90,80	Red
	Amount	255,90,80	Red
	Address	255,90,80	Red
	Other	255,90,80	Red
Project	Concern (Default)	195,235,255	Light blue
	Deliverable	195,235,255	Light blue
	Cost/Benefit	195,235,255	Light blue
	Feasibility	195,235,255	Light blue
	Resources	195,235,255	Light blue
	Estimate	195,235,255	Light blue
	Scheduling	195,235,255	Light blue



Usage Notes


- If a user's configuration file defines state "X" to be colored green, but the markup entity they are reviewing has "X" defined as blue, the state background will appear blue. This occurs when different users have different types and states defined.
- The State font color is normally black. If the background color for the State has a luminance less than 80, the state will display using a white font.

Changemark™ filters

On the Changemark™ [panel](#), you can filter Changemark notes by content and review the results sorted by title, author, date, type, state, position in the document, or number of replies.

Filter by Content

You can filter the Changemark list by a word or phrase appearing in the Changemark's title or description. Only the Changemark notes containing the requested word or phrase will display in the Changemark list when the search is executed.

To filter Changemark notes by text content that appears in either the Changemark title or description, type the word or phrase in the Search text box and click  (you can turn on *Whole Word* or *Match Case* filters by selecting one or both of these options through the search arrow drop down menu).

Changemark Search Content Options:

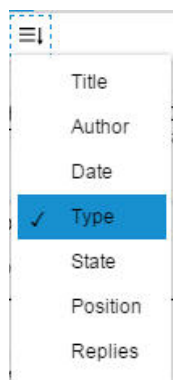
Cumulative - if checked, searches only within results of previous search. If unchecked, the search will query all Changemarks in the document.


Match Case - searches for the text exactly as typed with upper and lower case characters.

Whole Word - finds the typed characters as an entire word as opposed to being part of a longer word.

Term Hit - if checked, search terms will appear highlighted yellow in the results.

Sort by Attribute



Included in the Changemark panel is a drop down menu  that will sort the current Changemark results by "Title", "Date", "Author", "Type", "State", "Position", or "Replies". Selecting one of these commands sorts the currently available Changemark notes by that attribute and displays the resulting list in ascending order.

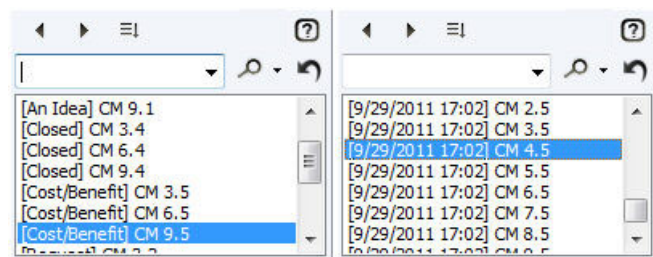
The **Date** attribute sorts the Changemark notes by their creation date, unless a reply is present. In that case, the time stamp of the latest reply (rather than time stamp of the original Changemark creation) is used to determine order of the Changemark.

For information about **Type** and **State** filters, see [Changemark Types and States](#).

Position sorts the Changemark notes in the order that they appear in the document pages.

When a Changemark discussion exists, you can use the **Replies** attribute to sort by the number of replies that are contained in each Changemark discussion.

To assist with visibility, when sorting Changemark notes, the resulting list displays (in brackets) the current sort criteria, followed by the Changemark title. For example, State filter results would appear as *[State] Title*, or Date would appear as *[Date] Title*:



The Changemark panel shows the details for the currently selected Changemark note. If you select a Changemark note in the viewing window (using the [Select](#) tool), the details for that Changemark note are shown.

See also:

[Reviewing Changemark notes](#)

Using the Checkview tool

Checkview overview

Similar to [Changemark notes](#), Checkviews are markup entities designed to focus the attention of a reviewer towards particular areas of content of a document or drawing. They are meant to be a collaborative markup element where a user will author a markup file and place Checkviews at various positions within the document. A reviewer will then load the same (or similar) document and open the markup for review, using the Checkview panel to step through and verify each Checkview tag. The reviewer will be able to post a reply associated with each Checkview tag and can assign a state of Ok, Not Ok, or unchecked.

This tool is intended to provide greater efficiency by allowing users to repeatedly review certain points on a set of similar documents in a stepwise fashion and indicate whether the reviewed content is complete or incomplete (pass or fail). Once review is complete, record can be made that this check has been performed. The workflow is similar to the following:

1. A markup author places a Checkview entity on an area of a document and can optionally create a template to be used on like documents.
2. The author enters instruction text to tell the reviewer what to check.
3. The markup reviewer navigates through the Checkviews and indicates Ok or Not ok. He can optionally add a reply comment if the content is incomplete.

As an example, if a bank employs operators whose main task is to review similar documents to verify they are all [signed](#) properly, great throughput is desirable. A Checkview markup (as a template) is created for a class of document (authored). Each time a document of this type is viewed, the markup is loaded in the review template. The operator is automatically navigated to the first Checkview location for review. If he indicates "Ok" (this area being reviewed looks good and is signed properly), Brava! advances to the next Checkview to be reviewed. If "Not Ok" is selected, he is given the option to add a comment and state what is incomplete, or he can advance to the next Checkview.

See Also:


[Authoring Checkviews](#)

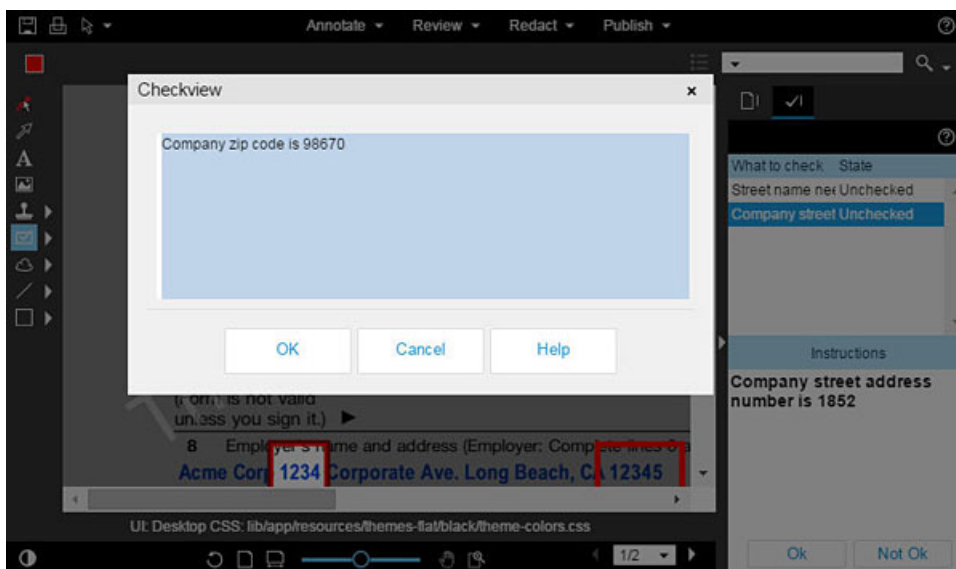
[Reviewing Checkviews](#)


[Signature Overview](#)

Authoring a Checkview

The Checkview feature allows authors of [markups](#) to assign a placeholder and descriptive text in a markup template to be later [reviewed](#) for completeness. The template is later used on a class of files to be reviewed and verified with greater efficiency. All Checkview tags contained in the opened markup files can be sequentially reviewed in the Checkview tab.

1. To activate the Checkview tool, click on the Checkview icon  which is available from the [Changemark](#) group of the [Markup toolbar](#).
2. To place a Checkview tag on the lines of the document (usually a form) that you want reviewers to verify (such as whether the document has been [signed](#)), left-click and drag a rectangle around the location you want to draw the reviewers focus to. The document area outside of the rectangle appears with a gray overlay, bringing focus to the area highlighted within the Checkview entity.
3. Enter any instructions for the intended [reviewers](#) in the comment box (this entry is optional and can be quite extensive) in the scrolling window and click OK. (You can also copy text from the clipboard and select Paste from the right mouse button menu). Any URLs that are recognized in the Checkview text will be active [hyperlinks](#) in the review panel.



4. Click **OK** to close the text box.  Tip: You can double click the Checkview entity itself (while in markup select mode) to edit the text instructions.
5. [Save the markup](#) to be used on the current document.

See Also:

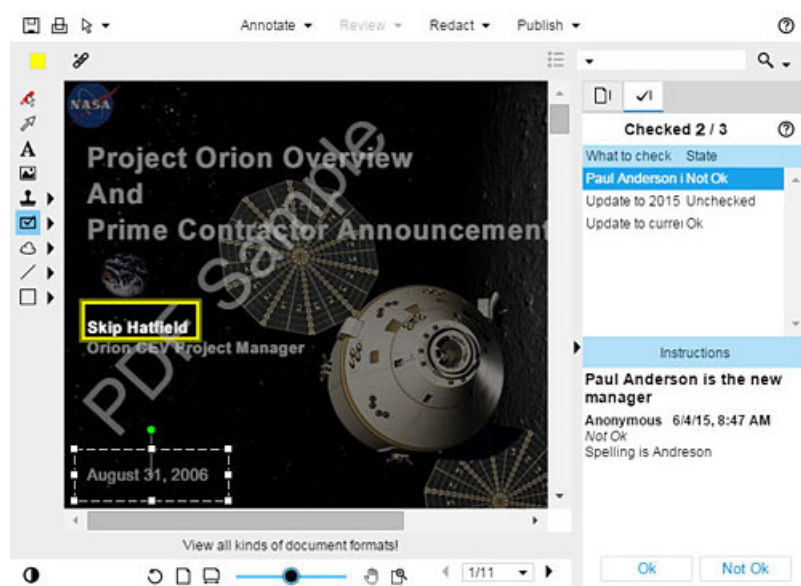
[Checkview Overview](#)

Reviewing Checkviews

Checkview Review


When a markup file containing Checkview entities is opened for review, the Checkview Panel is used to display the Checkview information. Reviewers can sequentially step through each Checkview and verify the document content where each focus area was placed. Note that the areas highlighted with Checkviews remain clear while the unhighlighted areas of the document display with a gray overlay.


The Checkview Panel: The Checkview status area at the top of the panel indicates the total number of Checkviews available and the total number of Checkviews that have not been reviewed and marked Ok or Not Ok ("Checked 2/3" in the example below). The "What to check" list contains an entry for each Checkview and displays the first portion of the Checkview Instruction Text and the current state of the Checkview. The lower portion of the Checkview panel (*Instructions*) displays the currently active Checkview Instruction Text in full, as well as each Checkview reply that may be associated with the current Checkview.



When a Checkview in the list is clicked, the *Ok* and *Not Ok* buttons are enabled and the viewing area is updated to display the view state that existed when the Checkview was created. The reviewer can select OK or Not Ok to update the state of the Checkview. If the reviewer clicks Not OK, a dialog appears giving him the opportunity to enter a reply.

To review Checkview tags:

1. Open the file with the appropriate markup open or [overlaid](#) (Click  or from the File menu, select Markup-> Open for Review to find the desired associated markup file(s) to review).

 **Note:** If users in your workflow have replied to existing Checkviews while in Review mode, their replies will have been saved as associated markup files. The original markup file containing the Checkview and all associated reply markup files will need to be opened for review to view

the entire conversation when selecting the original Checkview from the list. The replies will live in the original markup file if the user has replied while in edit mode and one Checkview can contain multiple replies from multiple authors.

2. Select the Checkview panel ☒ of the [Brava! Task pane](#) to display the list of items to check.
3. Click on a resulting Checkview in the list that you wish to view. The original Checkview instruction text displays in the panel's lower frame, including any replies that have been added.
4. Review the content and determine if it is complete or incomplete. If incomplete, clicking Not OK will optionally allow you to enter a comment in the Reply field. [Hyperlinks](#) can be added to the comment field and will launch the specified URL in a separate browser window.



5. Click the **Ok** or **Not Ok** button to progress to the next Checkview tag in the document. The state of the Checkview will update from Unchecked to either Ok or Not Ok.



Usage Notes

- The Checkview list in the Checkview Panel contains two columns. The first column, “What to check”, displays Checkview Instruction Text (that fits within the column width). The second column, “State”, contains the state of the newest Checkview Reply or Unchecked if there are no Replies. Clicking on “What to check” header will cause the list to be sorted by the Checkview position in the document. Clicking on the “State” column header will cause any UNCHECKED entries in the list to be sorted to the top.
- Checkview entities are only detectable and selectable if they are in their active state. A Checkview will lose its active state whenever a mouse tool is changed, a page is changed, or a markup creating mouse tool is clicked inside the view area.
- Checkview Replies are very similar to Changemark Replies in that they are only associated with their parent Checkview. This means that they can exist in markup files that do not contain the parent Checkview.
- If a user has a markup open for review that contains Checkview entities, and there is no markup open for edit, using the Checkview Panel to create Checkview Replies will cause a new editable markup to be created.

- If a user has a markup open for review that contains Checkview entities, they will only be able to create Checkview replies if the current configuration allows the creation of new markup files/elements.
- Editing an existing Checkview element's rectangle will NOT update the stored viewstate. This means the rectangle could potentially be moved outside of the stored view state.
- There is currently no way to edit or delete an existing Checkview Reply.

Changing markup properties

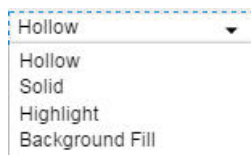
Markup properties tools

The markup properties toolbar is available when creating or editing markup files. You can edit the available markup properties individually or to a group of entities. Use the [Select Markup](#) tool to pick and edit one or more markup entities.



 [Color](#)

 [Hyperlinks](#)



The Fill Style properties are only available for the Rectangle, Ellipse, and Polygon tools.

[Solid](#)

[Hollow](#)

[Highlight](#)

[Background Fill](#)

The [Insert Image](#) tool provides a drop down list in the Properties toolbar of available image and stamp files.

Highlight properties

This property allows you to draw translucent shapes. Highlights can be selected from the drop down menu as a property for the Rectangle, Ellipse, and Polygon tools.

Select one of the above markup shapes from the [Markup toolbar](#) and select your desired options from the [markup properties](#) toolbar.

For the Rectangular or Elliptical Highlight tools:

1. Press and hold the left mouse button and drag the mouse pointer to draw the shape.
2. Release the mouse button to set the entity.

For the Polygon Highlight:

1. Click the left mouse button where you want to set the first vertex of the polygon.
2. Move the mouse pointer to where you want the second vertex and click the left mouse button again.
3. Set any remaining vertices, and then double-click the left mouse button at the last vertex position and Brava! automatically fills in the last line segment for you (connecting the last vertex point to the first)

[Edit](#) the markup as desired. If the markup is not currently active, use the [select markup](#) tool to pick it.

Background fill

Background fill is the same color as the current image background color however, it is white when printed. Background fills cover the designated area giving the impression that the area has been hidden; note however that this information is not truly hidden since any text underneath the fill can be searched or copied, or, if the background fill is not part of a published markup, the markup can be closed. To truly block out information, a markup containing redaction entities needs to be published.

Background fills can be used to allow extra space for comments and other markups. They can be selected from the drop down menu as a property for the Rectangle, Ellipse, and Polygon tools. Select one of these markup shapes from the Markup toolbar and select your desired options from the markup properties toolbar.

To draw a Rectangular or Elliptical Background fill:

1. Click and hold the left mouse button and drag the mouse pointer to draw the shape.
2. Release the mouse button to set the entity.

For the Poly Background fill:

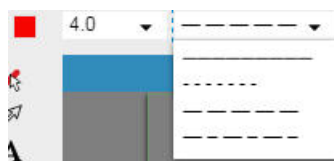
1. Click the left mouse button where you want to set the first vertex of the polygon.

2. Move the mouse pointer to where you want the second vertex and click the left mouse button again.
3. Set any remaining vertices, and then double-click the left mouse button at the last vertex position and Brava! automatically fills in the last line segment for you (connecting the last vertex point to the first).

[Edit](#) the markup as desired. If the markup is not currently active, use the select markup tool to pick it.

Line style and width


You can change the line width of existing markup lines. If the markup is not currently active, use the [select markup](#) tool to pick it. Change the style and width of markup lines by using the Line Style and Line Width tools:

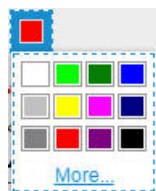


Select a new line style and line width (from 0-10) from the drop down boxes when available from the [Markup properties](#) toolbar.

Markup color

You can change the color of any markup entity, including [redactups](#), using the 12 predefined markup colors. You can also select from a wider range of colors by selecting the "More" button from the markup color list. This summons a color chooser dialog box containing a wide range of color options. Each markup can be a different color and it can be changed at any time.

To change the markup color, click  on the [markup properties](#) toolbar when available and select the new color from the drop-down. Click **More...** to access the custom color dialog.





Hyperlinks


A hyperlink contains a pointer to a text, image, sound or video file or a web address. When you launch a hyperlink contained in a Changemark or markup entity, the application associated with that file type is automatically launched and the specified file is loaded. If the hyperlink references a web address, the default browser is launched and goes to the specified URL.

Add a hyperlink

You can attach a hyperlink to a [Changemark note](#) or to any [markup](#) entity.

To [edit](#) a Changemark or entity to add a hyperlink, click  to select the entity and then click  to enter a specific URL in the text box. Only one hyperlink URL can be assigned to each markup object. In the case of Changemark notes, any URL entered into the Changemark text field will automatically become an active hyperlink in the Changemark panel and can include multiple URLs. In addition, URLs added to the panel in [Changemark Discussion](#) mode will also be active.

Launch a hyperlink

To launch a hyperlink from within a HTML Client window, use the select tool  to move the cursor over an entity containing a hyperlink (pointer changes to a hand) and left-click.

To launch hyperlinks contained in Changemark, open the [Changemark panel](#) and click on any active hyperlink (indicated with underlined blue text). The URL will launch in a separate browser window.



Note: Administrators can specify through a parameter how hyperlinks launch in the viewer.

default launches each document in its own separate window

one launches all documents in a separate window as Brava!

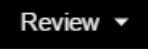

self launches documents in the frame (if frameset present) that the Brava! Viewer is in.

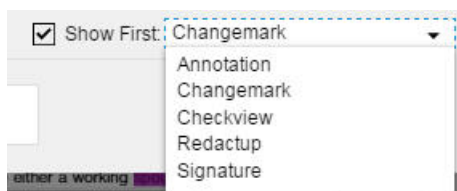
top launches documents in the same instance of the browser window replacing its current contents.

Reviewing files


Overlay a markup for review

Though an image can have only one editable markup associated with it, there can be multiple overlaid, or read-only markups attached. Markups opened for review cannot be edited, but one or more overlaid markup layers can be permanently [published](#) with the current file, along with any newly created markup layers, as a new markup. If markup layers have been published to the current file, then those burned in markups (including any Changemark™ notes and [discussions](#)) are now part of the current file and cannot be opened or closed independently.

1. Click the  button to summon the *Available Markup Files* dialog.
2. Select one or more available markup files to review. Available markup information displays Title, Author*, and creation Date.
 - If you would like to review (or close review) all associated markup files at once, use the "Open All" or "Close All" buttons rather than individual selection of file check boxes.
 - When viewing in [binder](#) mode, a Document column displays the name of the document the markup is for, and a 'Common Titles Only' check box is available that can be used to show only markup files that share the same title across all of the documents
3. Select the **Show First** check box and select an option from the drop-down if you would like the viewer to automatically pre-load the first instance of this option when the markup is loaded (forwarding the document to that page). For example, if you only want to review signatures, and the first signature is on page 10 of the document, selecting the *Signature* option will load the markup file beginning with the signature item located on page 10.  **Note:** This feature only applies to one markup file that is open for review.



4. Click **OK** to close the dialog.

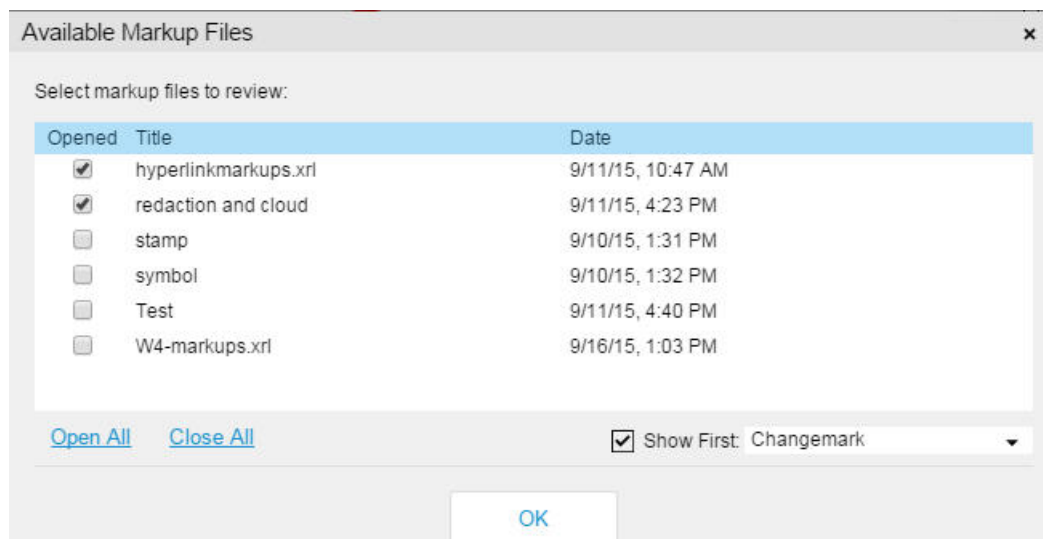
 **Note:** Brava! HTML viewer supports rendering (review) of off-page annotations in single page layouts that were created with Brava! ActiveX viewer. If any of these entities exist off page, extents will adjust the zoom level to include them in the viewing window.

5. To step through each page that contains [Changemark notes](#), from the Review drop down, select **Next Changemark Note**. If a Changemark note is found, the Changemark panel becomes the active panel

of the [Brava! Task pane](#), which opens automatically if currently closed. You can use the next and previous arrow in the Changemark panel to navigate through the open Changemark notes.

6. In markup review mode, you can review and reply to any [Changemark discussions](#) that exist.

Changemark discussion note: If users in your workflow have replied to existing discussions while in Review mode, their replies will have been saved as associated markup files (because the review markup is read-only). The original markup file containing the Changemark discussion and all associated reply markup files will need to be opened for review to view the entire conversation when selecting the original Changemark note from the list. The replies will reside in the original markup file if the user has replied while in edit mode. One Changemark note can contain multiple replies from multiple authors.



7. To close a markup file that is currently open for review, select **Close Review** from the *Review* button drop down menu. If only one file is open for review, it is automatically closed. If more than one file is opened, the *Available Markup Files* dialog displays where you can specify which files you want to close. Deselect the check box in order to close the markup file and then click **Close** to close the dialog.
8. If you have added replies to a [Changemark discussion](#) while in markup review mode, an editable markup layer will have been created to contain the associated reply data (since the review markup is read only). The reply layer remains open and unsaved even after you have closed the review markup (though now you will not be able to see the data). You will need to [save](#) the reply markup with a unique file name and this new reply file will need to be opened by reviewers along with the markup file containing the associated Changemark note to be visible.



Note: The optional show markup author feature can be enabled on the server (by an Administrator) by setting the HTML config parameter SHOW_AUTHOR to true. Otherwise, this field always displays "none".

See Also:

[Checkview Tool](#)




Reviewing Changemark™ notes

You or subsequent reviewers can view a list of all the Changemark™ notes associated with a document through the Review Changemark panel. The panel shows the detailed information (content, author name, timestamp, date, type, and state) about the Changemark that you have selected to review from the list or from the viewing window. Any replies to that Changemark note are also listed in chronological order.


If you are reviewing Changemark notes that you authored in the active markup file, you can also edit the Changemark.

1. Open a markup for [review](#).

Changemark discussion note: If users in your workflow have replied to existing discussions while in Review mode, their replies will have been saved as associated markup files (because the review markup is read-only). The original markup file containing the Changemark discussion and all associated reply markup files will need to be opened for review to view the entire conversation when selecting the original Changemark note from the list. The replies will reside in the original markup file if the user has replied while in edit mode and one Changemark note can contain multiple replies from multiple authors.

2. From the  drop-down menu, select **Review Changemark Notes**. The Changemark panel becomes the active panel of the [Brava! Task pane](#), which opens automatically if currently closed.
3. Existing Changemark notes can be sorted by title, author, date, type, state, or position by selecting the appropriate sorting order  from the drop down list. Position sorts the Changemark note in the order that they appear in the document pages.
4. You can [search and filter](#)  Changemark notes by content and/or title by entering a word or phrase in the search text box.
5. Click on a resulting Changemark note that you want to view. The original Changemark text displays in the panel's lower frame, including any [discussion](#) replies that have been added. The current [type and state](#) of the Changemark note are displayed at the bottom of the panel



- . Note that if replies are present in opened markups, but the markup file containing the associated Changemark note is not open, the reply will not be displayed in the pane. You must select the original Changemark note that contains the discussion and all associated replies that exist in the currently overlaid markup files will then display in the Changemark panel.
6. You can progress sequentially through the Changemark notes by using the **Next** and **Previous** arrow buttons . You can also step through Changemark notes by selecting **Next Changemark Note** and **Previous Changemark Note** from the Review drop down.
 7. In markup review or edit mode, you can enter into any active [discussion](#) from the Changemark panel by adding a reply (click *Add Reply*). When a reply is submitted for a Changemark note opened in review mode, a new editable markup layer is created (if one is not currently open) where the reply

information is stored. You may use the [consolidate](#) markups feature if you would like to merge all of the separate reply markups into the original markup file.



Usage Notes

- Using Acrobat, you can review Changemark notes information that exists in files that have been [published](#) to PDF if Append Changemark notes was chosen as a publishing option.
- If the published file is PDF format, Changemark notes appear as PDF comments when viewed in Acrobat if the "Insert markup as PDF Comments" option is selected in the publish dialog.
- When viewing in [binder](#) mode, the [Changemarks](#) panel shows ALL Changemarks regardless of which document they are applied to.

See also:

[Creating Changemark Notes](#)

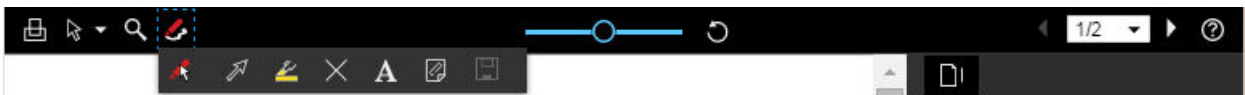
Simple View

The Brava! HTML viewer can launch with different themes using alternate HTML pages. The *desktop-simple-black.html* and *desktop-simple-white.html* launch pages, found in the *...BravaSDK/HTML/samples/themes* directory, can be used to review documents in a simplified view interface. This interface presents a streamline viewing toolbar offering only [Print](#), [Select](#), [Annotate](#) (limited), [Search](#), [Zoom](#), [Rotate](#), [Verify Panel](#), and [page navigation](#) tools.

Simple-white toolbar:



Simple-black toolbar:



The simple markup toolbar includes tools for [markup select](#), [arrow](#), [highlight](#), [crossout](#), [text](#), [Changemark Note](#), and [save](#).

Minimal themes:

In addition to the simple html pages, a *desktop-minimal-black.html* and *desktop-minimal-white.html* launch page are available which can be used for the purpose of read only. These themes provide only document view, page thumbnail view, and bookmark view.

Document Binders

Working with document binders

Brava! HTML viewer provides the ability to view and work with a binder of documents which contains links and references to two or more documents. Annotation, redaction, and search features are supported across the document binder.

An SDK sample file is available for creating document binders; located in


`...BravaSDK\HTML\samples\binder\sample.html`

Please see the Brava! SDK documentation for information on how to configure this feature for your integration.

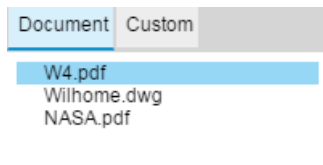


Usage notes:

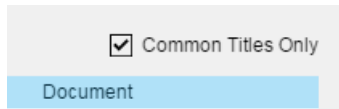
- [Compare report](#) functionality is supported only if the first document in the binder is a compare report.
- Binders MUST use only prepublished documents.
- The [thumbnail](#) panel shows all of the thumbnails from ALL of the binder's documents, and the document titles and binder page numbers are shown.
- The [page selector](#) on the bottom toolbar shows ALL of the pages of all documents in the binder and includes the source document title. In the example below, details of the current page display as: 2/15 (binder page/total pages in binder) W4.pdf (document page title) -2/2 (document page/total pages in document).



- The [bookmark](#) pane automatically creates a top-level bookmark for each document, with that document's bookmarks (if any) displayed underneath.



- Document [searches](#) span ALL documents with a single unified search results panel, as do the various [redaction](#) tools that rely on searching.
- The redaction [verify](#) panel and the [Changemarks](#) panel show ALL redactups and Changemarks regardless of which document they are applied to.
- The [open/review](#) markup dialogs include an extra column showing which document the markup file is for, and also a "Common Titles Only" check box which, when selected, shows only markup files that share the same title across all of the documents.



- The [print](#) and [publish](#) dialogs ONLY apply to the current page's document, and that document is reflected in the title bar of the dialog.
- All of the [Annotate](#) menu items operate on the binder en mass.
- [Markup consolidation/ownership](#) changes are applied across ALL documents.
- Markup entities can be [copied](#) and pasted across all documents in a binder.

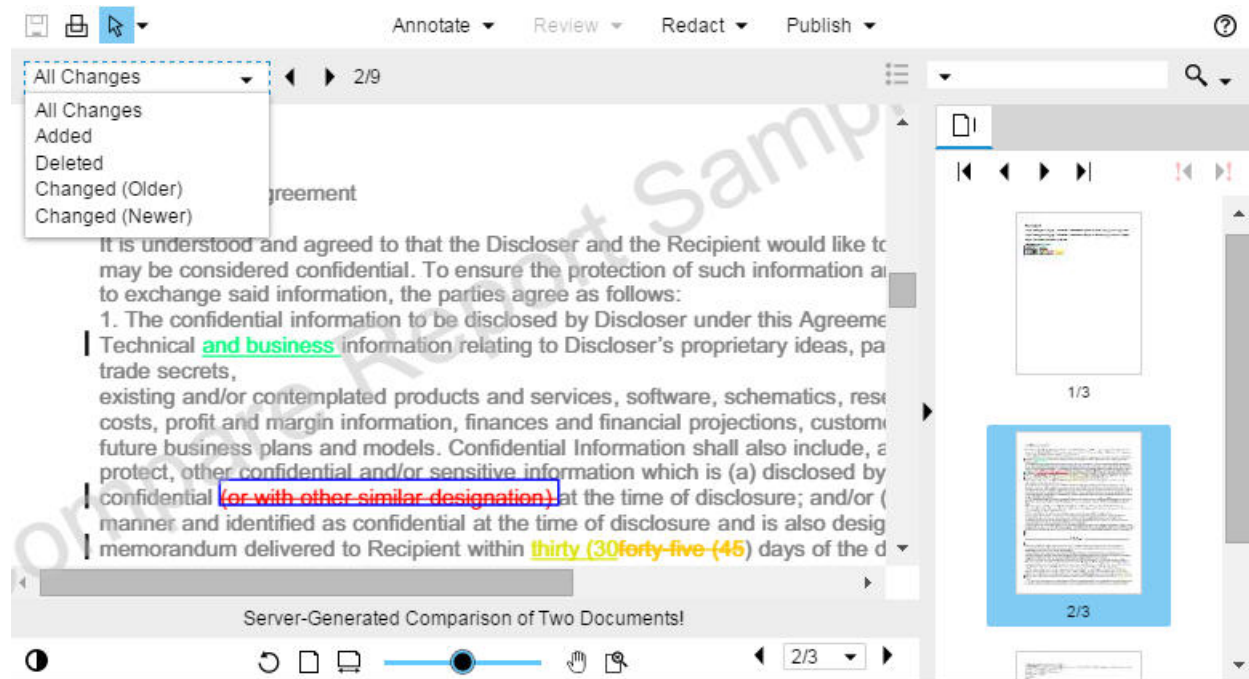
Using Text Compare

Text Compare Reporting

Text Compare Reporting is an optional integration feature of the HTML viewer. This option may or may not be exposed and available with your specific integration.

A sample page (compare-report.html) is provided in the Brava! Enterprise
..\BravaSDK\HTML\samples\compare-report\ installation directory.

When used, the Brava! Server generates a merged PDF compare report of the two source files specified in the compare report sample page and displays the results report in the HTML client which can then be printed or exported as TIFF or PDF to the file system.



The entire comparison is merged and the report contains the following information:

- File names: The display name of the original and compare documents are shown in the Compare report PDF file. Descriptions of the older and newer versions of the document can be customized within an integration.
- Date and time that the report was published.
- Merged content : The contents of the older document, merged with the additions and changes appearing in the newer document.
- For any line that contains a difference, a black vertical line along the left edge of the document displays as a visual indicator of a difference existing in that location.
- Color legend: The color legend reflects the type of text changes in the merged content:

~~Red text with a strikethrough~~ == text deleted from the older document

Green text with an underline == text added in the newer document

Yellow text with an underline == text changed, newer version

~~Yellow / Brown text with a strikethrough~~ == text changed, older version

If a change report is loaded that has at least one change, the change [report toolbar](#) is shown in the viewer. If no changes are reported, only the document title displays. The change report UI includes support for Annotate, Redact, Print, and Publish to PDF/TIFF.

A summary page of statistics for each type of change is not displayed in the report created for the HTML client.

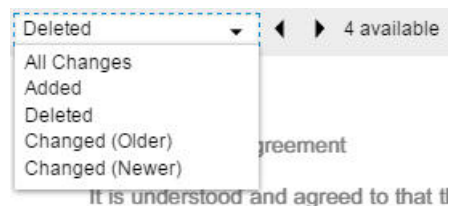
Report uses and benefits:

This text compare report can be used for several purposes. One use might be for verification that requested edits have in fact been done correctly. Another might be to serve as a record of the edits that can be kept for auditing purposes. In the first case, a user who doesn't edit the documents or have Brava! installed, is provided with a compare report (either electronically or on paper). He might even be provided with a package that contains the "before" version, the "after" version, and the compare report. Once the "after" document is approved, the compare report has little value to the user. This leads to the second case of the compare report serving as a record of the change history of a document. Document management systems are good at recording editing and version check-in activities, but the system has no visibility as to the changes that occurred within the document. By keeping a copy of the compare report a complete record of the changes made can be retained.

Compare Report toolbar

If a [change report](#) is loaded that has at least one change as a result of comparing two documents, the below change report toolbar is shown in the viewer. If no changes are reported, only the document title displays. The change report UI includes tool buttons and support for [Annotate](#), [Redact](#), [Print](#), and Publish to [PDF/TIFF](#).

To use the report toolbar, select an available option from the drop-down list. A summary of results displays after the previous and next instance arrows. In this example, 1 available instance of a deletion is found and when selected, the first instance is shown in the viewer. If more than one instance exists, the navigation arrows will take you to the next/previous instance (of the change type specified) in the document.

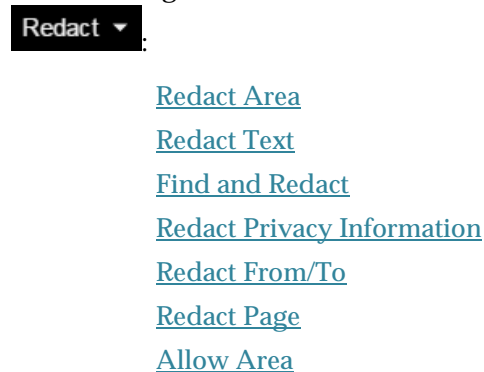


Redacting files

Redaction

Brava! Enterprise software allow users to designate a [markup](#) file containing redactup entities (rectangular solid covers to mark an area for redaction) to be published with the file as a redacted document rendition (as a PDF or TIFF output file). This means that the redactions associated with the [published](#) document can never be edited or removed by the end-user and the text and images beneath the redactup entities cannot be viewed, copied, or searched. Redactions are used to conceal sensitive information for legal, financial, privacy, and security reasons, for example.

The following redaction tools are available through the [Redaction toolbar](#) which displays when you click



To redact a document:

1. Open a file you would like to redact and use any of the redaction tools listed above to place your redactup entities.
2. [Verify](#) your redactups to be finalized.
3. [Finalize](#) the file as a redacted PDF or TIFF version for distribution. (You can optionally [publish a Draft](#) version to be circulated for review.)

Redactions can never be exposed on published PDF and TIFF files. The file will open, but any redactup entities remain opaque and areas (including any searchable text) beneath them are permanently removed. You cannot turn off the visibility state of a markup or redaction layer that has been published as a redaction.

Glossary of Terms

Throughout the redaction portion of this user guide, you will see the following terms used. This page provides a brief description of each:

Redactup

A marked area (transparent rectangle) on a document that will result in a Redaction when finalized.

Redaction

A Redactup that has been finalized into a “Redaction” that results in opaque cover up and content removal.

Redact

The action of creating a Redactup.

Verify

The act of manually reviewing (and editing, if needed) each redactup that has been placed on a document before finalizing the redactions through publishing.

Finalize

The act of publishing a file that has marked areas (redactups) for redaction. Text under redactups will be removed upon finalize and redactups will become redactions.

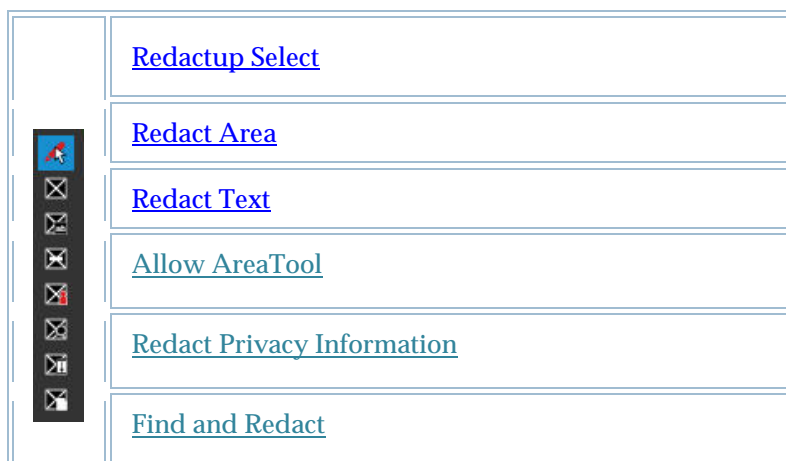
Draft

The act of publishing a PDF draft of proposed redactions for distribution and review before finalizing.

Redaction toolbar

The vertical **Redaction** toolbar is available when Brava! is in Redact mode and contains related groups of redaction tools. (The redaction tools are only available if your Brava! Server Administrator allows and enables this feature.)

From top to bottom, the tools are:




	Redact From/To
	Redact Page

Additional menu options available from the **Redact ▼** button include:



[Finalize Redactions and Publish](#) (PDF/TIFF)

[Publish Review Draft As](#) (PDF/TIFF)

Redact Area tool

The Redact Area tool  allows you to manually place one or more rectangular covers over areas of a sensitive or confidential document to block only certain portions from being viewed, searched, or copied after the file is published to [PDF](#) or [TIFF](#).


To create a Redact Area entity:

1. Open a document containing text or images that you would like to redact.
2. Click **Redact ▼** from the task bar to display the Redaction toolbar.
3. Click the *Redact Area* tool  from the Redaction toolbar.
4. Click and hold the left mouse button and drag the mouse pointer to draw the rectangular shape on the image.
5. Release the mouse button to set the entity.
6. Enter a [reason](#) for the redaction in the Reason text field, if desired. A list of recently used reasons is available in the Reason drop down.
7. Note that if text is highlighted in the redact area, a "T" button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.
8. [Edit](#) the redactup as desired, including changing its [color](#). If the redactup is not currently active, use the [Select Markup](#) tool to pick it.
9. It is recommended to manually review and [verify](#) the redactups before publishing a finalized redacted version.
10. To complete the redaction, the markup must be published as a redacted version of the current file, otherwise the redactups will just remain as transparent entities. Select **Finalize Redactions and Publish As** from the **Redact ▼** drop down menu and select your publishing options. See the [Finalizing](#) topic for help with publishing redactions.



See Also:

[Publishing Markups](#)

Redact Text tool

 The Redact Text tool allows you to manually place a redactup over a section of selectable text. Unlike the Redact Area tool, image areas are not included in the selection. Use the Redact Text tool to directly select text to redact or redact all like instances of a selected word or phrase.

To create a Redact Text entity:


1. Open a document containing text that you would like to redact.
2. Click the Redact Text tool  from the Redaction toolbar.
3. Select a [reason](#) for the redaction if desired or required.
4. To select text for redaction, click and hold the left mouse button and drag the mouse pointer directly across the text you want to redact. **Note that selecting a single word or term will find and select for redaction all like-terms contained in the document.**
5. Release the mouse button to set the entity. The currently selected reason is applied.
6. When text is selected, a "T" button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.
7. Once the redactups are created, they are all independent and any [changes](#) made to one does not affect other redactups. Note that the [Undo](#) command undoes all the redactups made with this tool at once.
8. To complete the redaction, the redactups must be finalized and published as new PDF or TIFF file version; otherwise the redactups will just remain as transparent entities. See [finalizing redactups](#).



Usage Notes

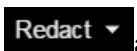


- When the tool is active, selected text is automatically searched for, and like instances are redacted, throughout the document - whether that be one word, or an entire paragraph.
- The tool will not redact your text selection if it is only 1 character long.
- If your text selection is 2 or 3 characters long it will perform the search with "match case" enabled, otherwise, it will perform the search with "match case" disabled.
- If your selection contains whole words, and the first and last character are not punctuations, then it will perform the search with the "whole word" option enabled, otherwise, it will perform the search with the "whole word" option disabled.
- A character will only be included for selection and redacted if its center point is captured.

Allow Area tool

 This tool allows you to cut away areas within an unpublished redactup entity that you would like to reveal (exclude from the published redaction). The Allow Area rectangle, when drawn over an existing redactup entity, cancels the redaction in that area only.

The tool has no effect on any area of the document other than on top of an existing, editable redactup, before the file is published. It has no effect on redactions that have been previously published to TIFF or PDF files.

To create an Allow Area rectangle:

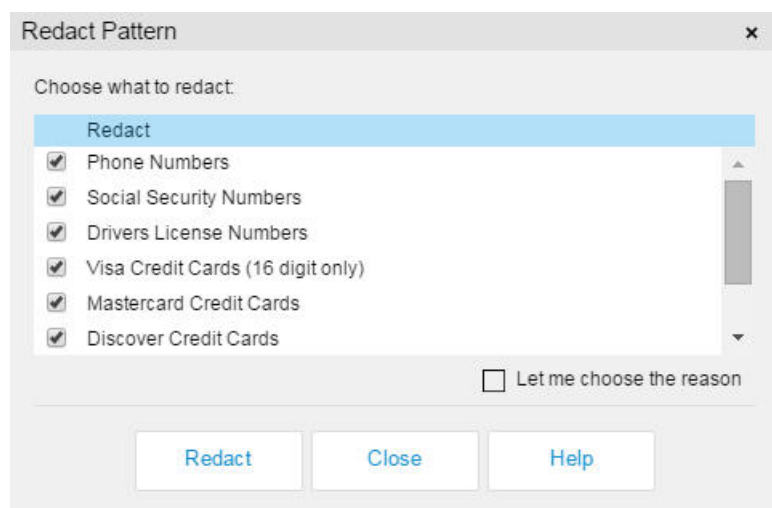
1. Open or [create](#) a markup document that contains redactup entities (using the Redact Area, Find& Redact, Find & Redact From/To, Redact Privacy Information, or Redact Pages tools).
2. Click  and then click the Allow Area tool  from the Redaction toolbar.
3. Click and hold the left mouse button and drag the mouse pointer to draw one or more rectangular shapes on at least a portion of an existing [redacted area](#) or [redacted page](#). Release the mouse button to set each Allow Area rectangle.
4. Once set, Allow Area entities cannot be edited, moved, resized, or deleted. However, they can be removed with the [Undo](#) function - or you can place an additional redactup rectangle on top of an Allow Area to re-conceal it.
5. To complete the redaction, publish the file. Select **Finalize Redactions and Publish As >PDF or TIFF (redacted)** from the  drop down menu and select your publishing options.

Redact Privacy Information tool




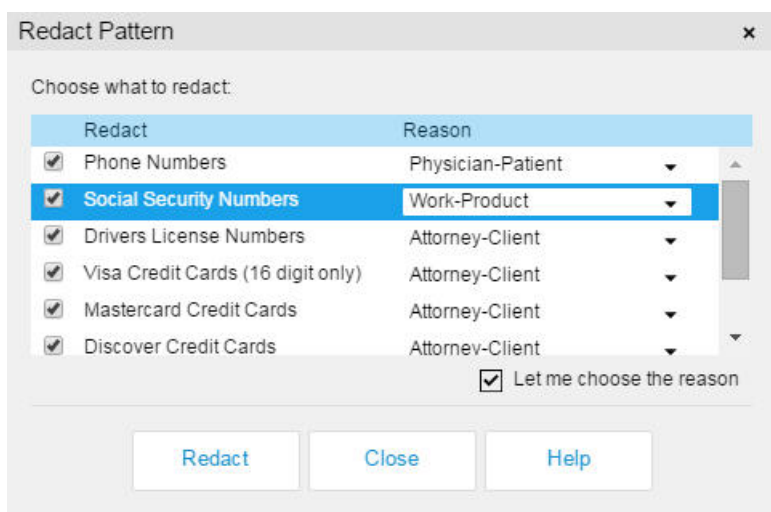
Use the Redact Privacy Info tool to quickly find and redact sensitive information commonly found in documents and forms including Social Security numbers, phone numbers, driver's license numbers, and credit card numbers.


This dialog acts as a convenient tool for using the available predefined search macros without needing to format search strings. You can select one or more of the text pattern methods to apply to the current document.



To use the Redact Privacy Information tool:

1. Open a document containing sensitive information that you would like to redact and click **Redact** to display the Redaction toolbar.
2. Click the Redact Privacy Info tool  from the Redaction toolbar.
3. Select one or more check boxes for the items you would like to redact in the current document.
4. Select "Let me choose the [reason](#)" check box (if desired), and an available reason can be chosen from the Reason drop down list.



5. Click **Redact**. A dialog informs you of the number of strings that were found and marked for redaction.
6. Note that if text is highlighted in the redact area, a "T" button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.

- To complete the redaction, the markup must be published as a redacted version of the current file, otherwise the redactups will just remain as transparent entities. Select **Publish to (TIFF or PDF)** from the **Redact** drop down menu and select your publishing options. See the [Publishing](#) topic for help with publishing markups. You should also choose to [verify](#) the redactups before publishing a finalized redacted version.

What Gets Redacted:

Phone Numbers - Finds all USA style phone number representations, both 7 and 10 digit.

SSN - Finds representations of US Social Security number patterns, such as 123-45-6789. This macro finds 9 digit strings, with or without hyphens, if the string is prefixed with any of the following (upper or lower case):

```
ssn:
social security number:
social security #:
social security:
social security
```

Drivers License - Redacts "Driver License: xxxxxx"

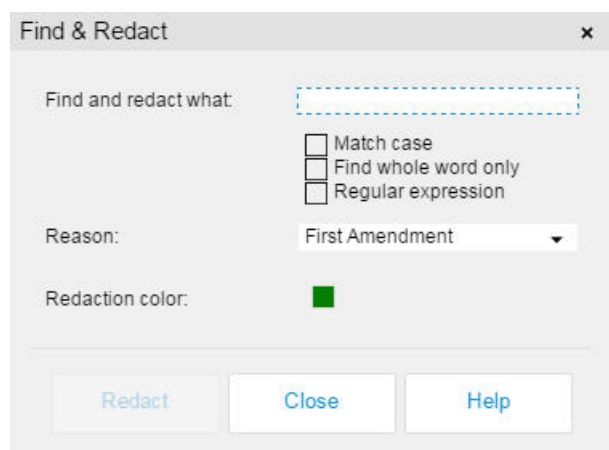
Credit cards - Finds and redacts instances of Visa, MasterCard, Discover, or American Express credit card numbers.





Note: Although the option is provided to specifically redact certain types of credit card patterns (Discover, American Express, Visa/MasterCard), these redaction options will also redact other types of cards with identical patterns if they exist in the same document. For example, Diner Card numbers will be redacted when selecting to redact Discover cards and Switch/Solo numbers are redacted when selecting to redact Visa/MasterCard credit card numbers.

Find & Redact tool

This tool lets you run a command, for just the open file, that finds and marks for redaction multiple instances of a common word or phrase simultaneously.



1. Click **Redact** from the task bar to display the Redaction toolbar.
2. Click the Find & Redact tool  from the toolbar.
3. Enter a find phrase in the text field of the Find & Redact dialog.
4. Use the **Find whole word only** option to find the typed string as an entire word as opposed to characters that are part of a longer word. Example, "state" finds only instances of "state" and ignores "stated", "statement", "estate", etc. This option is disabled when *Regular expression* is selected.
5. Select **Match case** to specify searches for the text exactly as typed with upper and lower case characters.
6. Enable **Regular expression** to perform simple regular expression searches without the need to learn advanced syntax. Once checked, the contents of the "Find and redact what:" text box is interpreted as a regular expression, as if the user had prefixed the search term with the regex:: search mode modifier. This option facilitates simple wildcard matching. If not selected, search uses classic search algorithms. See examples below.
7. You can click the **Redaction color** box to summon a limited color selection panel. For additional color choices, clicking *More..* prompts a standard Windows color selection dialog.
8. Optionally, you can enter a [reason](#) for redaction in the Reason text field. You can use common exemption codes as reasons.
 - If this field is populated, the phrase is added as a text attribute to the redaction and displays on top of the redaction rectangle entity when the file is published. Reason codes can be included as a summary page in the published and printed output.
9. Click **Redact** to find and redact all phrases that match the redaction find string.
10. Note that if text is highlighted in the redact area, a "T" button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.
11. A dialog appears informing you how many instances were found and marked for redaction. Click **OK** to return to the *Find & Redact* dialog.
12. Select **Close** to exit, or adjust the text string and perform another Find & Redact action.

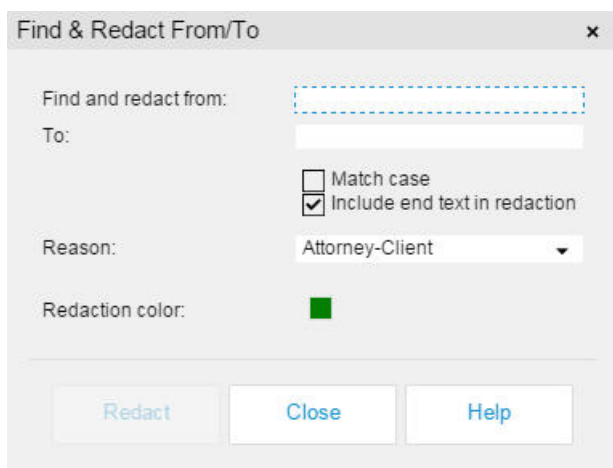
- To complete the redaction, the file must be published as a redacted version of the current file, otherwise redactups will just remain as transparent entities. Select **Finalize Redactions and Publish As -> (PDF or TIFF)** from the **Redact** drop down menu and select your publishing options. See the [Publishing](#) topic for help with publishing markups. You should also verify the redactups that were set before publishing a redacted version.

Raster/graphic text is not handled by the find and redact functions. It is strongly recommended to manually review any bulk redactions for accuracy as extra spacing and line wrapping may cause phrases to not be recognized by the Find text commands.



Find & Redact From/To tool

This tool lets you run a command, for just the open file, that finds and redacts sections of a document (using rectangular "redactup" entities) between two defined phrases.

- Click **Redact** and then click the *Find & Redact From/To* tool  from the Redaction toolbar.



- Enter a starting find phrase in the *Find and redact from:* text field of the dialog. The field is not case-sensitive. Currently macros and prefix command strings are not supported with the use of this tool.
- Enter an ending find phrase in the "to:" text field of the dialog.
- Use the **Include end text in redaction** option if you want the phrase entered in the "to" field to be redacted, otherwise, content is redacted to include the first character of the start phrase through to the last character that precedes the first character of the end phrase.
- You can click the **Redaction color** box to summon a limited color selection panel. For additional color choices, clicking *More..* prompts a standard Windows color selection dialog
- Optionally, you can enter a reason for redaction in the Reason text field.

7. Click **Redact** to find and redact all content that is located between matching From and To redaction find strings.
8. A dialog appears informing you how many instances were found and redacted. Click **OK** to return to the Find & Redact To/From dialog.
9. Note that if text is highlighted in the redact area, a "T" button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.
10. Select **Close** to exit, or adjust the text strings and perform another Find & Redact From/To command.
11. To complete the redaction, the file must be published as a redacted version of the current file, otherwise it will just remain a transparent entity. Select **Finalize Redactions and Publish to (PDF, or TIFF)** from the  drop down menu and select your publishing options. See the [Publishing](#) topic for help with publishing markups. You should also [verify](#) the redactions that were set before publishing a redacted version.

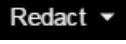

Raster/graphic text is not handled by the find and redact from/to function. It is strongly recommended to manually review any bulk redactions for accuracy as extra spacing and line wrapping may cause phrases to not be recognized by the Find text commands.



See Also:

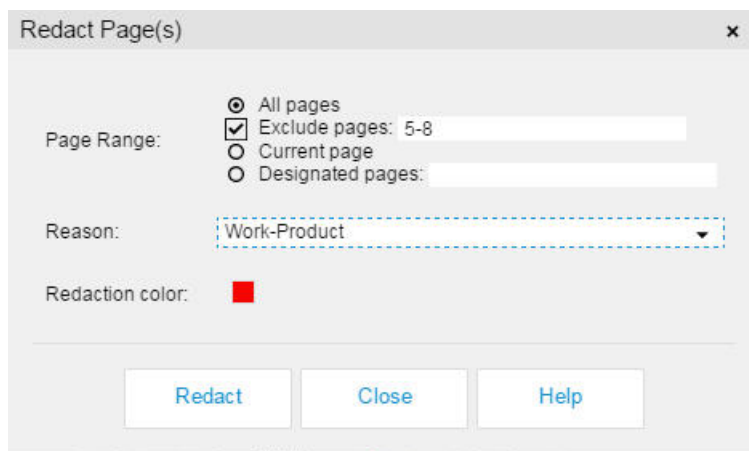
[Find & Redact](#)

Redact Page tool

This feature of Brava! HTML Viewer allows you to quickly redact entire pages of documents with one command. This tool is useful for redacting documents that contain only certain pages, words, or paragraphs that you want to release in the published rendition.

1. Click  from the task bar to display the Redaction toolbar.
2. Click the *Redact Page* button  from the Redaction toolbar.
3. In the *Redact Page(s)* dialog, select the desired page range to redact. You can select to redact all pages, only the currently displayed page, or a range of pages (type in the start and end page numbers).
4. If **All pages** is selected, you can optionally select and enter specific page numbers or ranges to exclude in the **Exclude pages:** text box.
5. Select a [reason](#) for the redaction, if desired.

6. Note that if text is highlighted in the page to be redacted, a 'T' button appears on the tool's properties bar labeled "Highlight text to be redacted" . Clicking this button highlights the selected text, allowing you to verify (and adjust if needed) the intended text to be redacted.
7. Click **Redact**.
8. Select **Publish to (TIFF or PDF)** from the **Redact**  drop down menu and select your publishing options. Once you publish the document, all content of the redacted pages will be completely unavailable (for view, print, copy, or search) in the redacted rendition.



The image shows a dialog box titled "Redact Page(s)" with a close button (X) in the top right corner. Inside the dialog, there are several options for redaction:

- Page Range:**
 - ☐ All pages
 - ☒ Exclude pages: 5-8
 - ☐ Current page
 - ☐ Designated pages:
- Reason:** A dropdown menu showing "Work-Product".
- Redaction color:** A red square color selector.

At the bottom of the dialog, there are three buttons: "Redact", "Close", and "Help".

Redaction Reasons

When using the [redaction tools](#), you can optionally assign a redaction reason code to each redactup entity placed on the document. Each entity can have a different reason code, if you so choose. Common exemption codes can be used as reasons. Reasons are entered and the field can be configured to use an integration URL to a custom reason code file.

The config directory located in the BravaSDK (i.e., C:\Program Files\IGC\Brava!\Brava!Server\BravaSDK\HTML\config) contains a number of sample redaction reason JSON files. The signed config has a parameter for specifying the redaction reasons JSON file to use.

If a custom reason file is used, only the reasons from the drop down list may be selected and users may manually not type in new reasons.

If enabled manually, reasons are entered in the current redaction tool's *Reason* text field (found in the tool's properties bar or dialog). If a new reason is entered, the reason is assigned and added to the drop down list upon hitting <enter>. The last reason used is persisted between sessions.

When [verifying](#) the redactups before publishing the file, you can filter redactups by reason code or color.

Publishing Redaction Reasons

If Redaction Reasons are associated with any redactup entities contained in a document you are publishing, the **Append redaction reasons** check box can be selected in the Publish Options dialogs.

When selected, the content associated with each Redaction Reason will publish at the end of the print job as a separate summary sheet. Each reason receives a unique number that can be matched up to the summary text. Published information includes the Redaction Reason string and date. When the published PDF or TIFF file is viewed, the redacted entities display text with numbered references corresponding to each reason listed in the summary page.


Printing Redaction Reasons

If Redaction Reasons are associated with any redactup entities contained in a document you are printing, the **Print redaction reasons** check box can be selected. When selected, the content associated with each Redaction Reason will print at the end of the print job as a separate summary sheet. Each reason receives a unique number that can be matched up to the text printout. Printed information includes the Redaction Reason string and date. Text that is too long for the area is first sized to fit, then truncated if it is still too long.

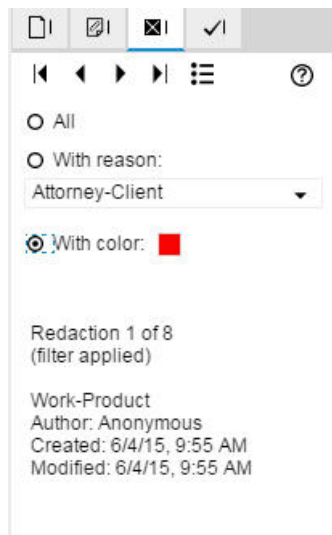
Verifying Redactups to be finalized

Once you have used the redaction tools on a document, you can optionally run the Verify tool to manually check the accuracy of each redactup entity that has been set on the document before it is published as a final redaction.

To Verify redactups:

1. Using any of the [redaction](#) tools on the current document, create a redactup file.
2. Click the Verify tab  from the [Brava! Task Pane](#) to reveal the Verify panel. Here you can filter and review all redactups before they are finalized. Note that when viewing in [binder](#) mode, the redaction verify panel shows ALL redactups regardless of which document they are applied to.
3. If you select **All**, the next and previous buttons scan through each redactup entity with active edit handles that can be selected and dragged to re-size the area. This feature allows you to check that all redactups have had reasons assigned and also allows you to check that if a redaction template was used, that the template properly covers everything it is supposed to and you can [make adjustments](#) to the entities if needed, including changing reason codes.
4. **Redactup Filters:** A set of options allows you to filter the redactups in the document by color or [reason](#) if you don't want to verify **All** redactups contained in the document. Note that every time the filter being applied changes, you are returned to the first entity in the document that meets the new criteria set by the filter.


- To filter by reason, select the **With reason** option and select an existing reason from the drop down list.
- To filter by color, select the **Color** option, then click the color menu arrow to choose a color from the selection palette. For a specific color, choose **More** to display the full custom color dialog.



5. Use the next and previous arrows to review each redactup contained in the file until you have verified all of them. Redactups are cycled through by order of their time stamp and not by order of location in the document. A redaction counter displays your current progress.



Note: Although you can step through and review all redactup entities contained in the document, including editable (owned by you) and non-editable (owned by a different author), you can only make changes to the ones you have authored.

6. You may [edit](#) any authored redactups as needed. You can unredact or edit (color and reason) one or all filtered redactups through the [Verify Results](#) dialog . Note that if a redactup entity color is tied to a redaction reason via a custom redaction reasons JSON file, the color will not be editable.
7. [Finalize](#) the file for distribution (as a redacted PDF or TIFF rendition of the file).



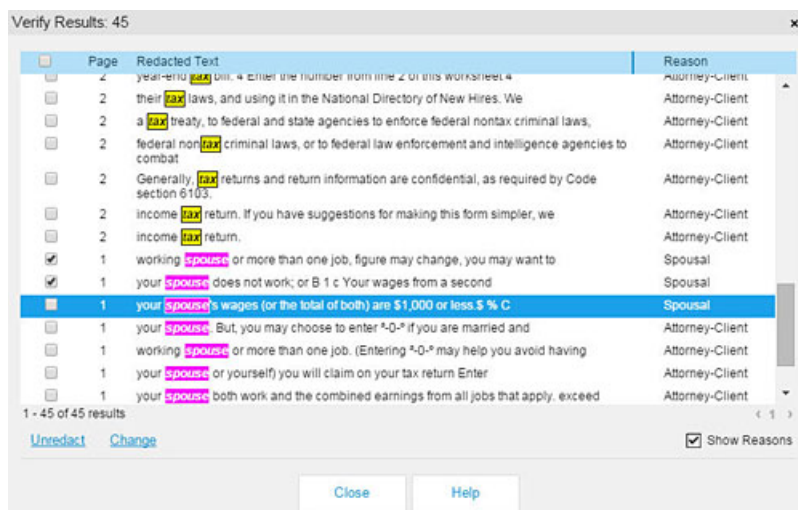
Note: When viewing in [binder](#) mode, the redaction verify panel shows ALL redactups regardless of which document they are applied to.

Verifying results

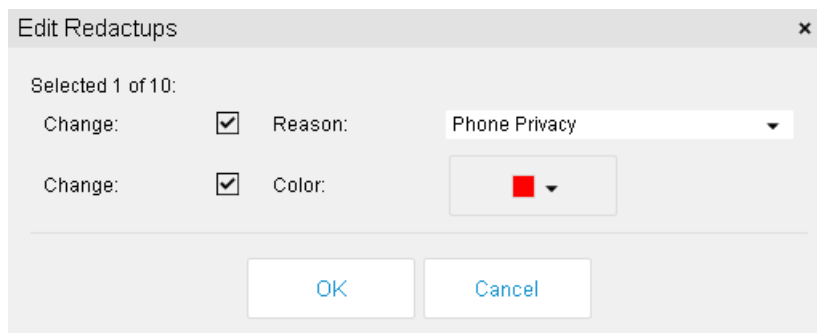
You can unredact or edit (color and reason) one or all [filtered](#) redactups through the *Verify Results* dialog before those results are [finalized](#) as redactions. To do this:

1. Click the Verify Results button  to summon the dialog.

- Click **Show Reasons** if you would like to view or edit the redaction reasons of each redactup.



- Select one or more filtered redactups to edit.
- Click **Unredact** if you would like to remove the selected redaction. The result is immediately removed from the list.
- Click **Change** to modify the selected redactup(s). Here you may select to edit the **Reason** and/or **Color** of one or more redactups.




- Click **OK** to save any changes you have made, or click **Cancel** to exit the Edit Redactup dialog without saving changes.
- Click **Close** to exit the Verify Results dialog and continue with your redactup review in the Verify panel.

Publishing review drafts

Before [finalizing](#) a document for redaction, you can publish a PDF or TIFF draft version of the current document for review purposes. The redactups on review drafts remain transparent and allow you to review what will be redacted (with complete reasons) on the finalized document. The draft is merely a

distributable snapshot of what is currently selected for pending redaction. To create a PDF/TIFF with true redactions, use the Finalize option.

To publish a review-only draft:

1. [Create a redactup](#) for the file you would like to publish as a review draft.
2. From the **Redact** drop-down menu , select **Publish Review Draft As**.
3. Select **PDF (unredacted)** or **TIFF (unredacted)**.
4. Select your PDF or TIFF Draft publishing options and click **Publish**.

When a PDF review draft is opened in Acrobat, the redaction reasons display in Adobe comments (Author/Reason) for quick review. (In the order they appear on the document, not by time stamp.)



Usage Notes

- When a review draft is opened in Brava, the redactups contained in the draft cannot be selected, edited or finalized. They are now part of the PDF file.
- The original redactup file (.xrl) is the working draft which can be verified and finalized at any time.
- [Reason codes](#) contained in a draft do not display on the review draft entities until the file is finalized.
- If the currently loaded file has already been finalized for redaction, the *Publish Review Draft As* menu item is disabled. Finalized redactions cannot be published as a review draft. However, you can close and reload the document along with the markup file containing the redactups in order to publish a draft.


Finalizing Redactions

You can publish redactions and output to TIFF or PDF format. This means that when the publishing action completes, the redactups and resulting redactions, as well as the currently set banners and watermarks are included within the newly created file and can never be closed or edited.

Before producing a final redacted version of the file, you can optionally produce an unredacted [PDF or TIFF draft](#) of the proposed redactions to be distributed for review purposes only.

To finalize redactions:

1. Open a document and [create a markup](#) or [redactup](#) layer. You may also open markup layers [for review](#).
2. If you have placed entities for redaction, you should [verify](#) your redactups before publishing the file as a redaction.
3. Click the **Publish** drop down arrow on the task bar and select a publishing output format: **Publish to PDF** or **Publish to TIFF**. When publishing redactions, you can select **Finalize**

Redactions and Publish as --> PDF (redacted) or TIFF(redacted) from the  drop down menu.

4. All currently opened markup layers are permanently published with the file's view. If the editable markup contains redactup entities, the markup layer is automatically published as a [redaction](#). Redacted files are renditions of the original file that have had all sensitive or proprietary information securely and permanently removed and can be used for outside distribution.
5. Select your publishing options for the desired output format and choose a destination location.
6. When a user opens a file that has been published with markups or redactions, both the markups and document are automatically visible.

Publishing of Markup Entities

Markups that don't contain redactup entities can be published with the current file to a PDF or TIFF file and any markup that is opened for review or edit is stored. The output file is a snapshot of the current view as a new file with markups permanently overlaid.

Publishing of Redactup Entities

Markups that contain redactup entities are published (finalized) to the output PDF or TIFF file for the purpose of redaction. A redaction processes these entities to disallow viewing, copying, or searching of concealed text.

Once a redactup contained in a markup layer has been published as a redaction (except in the initial view after publishing, where an [Undo](#) of the finalize redactions can be performed), no mechanism exists for you, as the author, to edit or remove that redaction.

When a user opens a published file that has markups and/or redactions, both the markups and document are automatically visible. Published markup layers cannot be closed, however, they can be printed and [reviewed](#).

When publishing redactions as [TIFF](#) and [PDF](#) files, you can choose whether or not to include the [redaction reason](#) code summary as an appended page.

See Also:

[Redaction](#)

[Publishing Review Drafts](#)

Publishing a file

Publishing as PDF

Brava! Enterprise HTML Viewer allows you to publish the currently viewed file (with or without open markups) to either PDF or TIFF format.

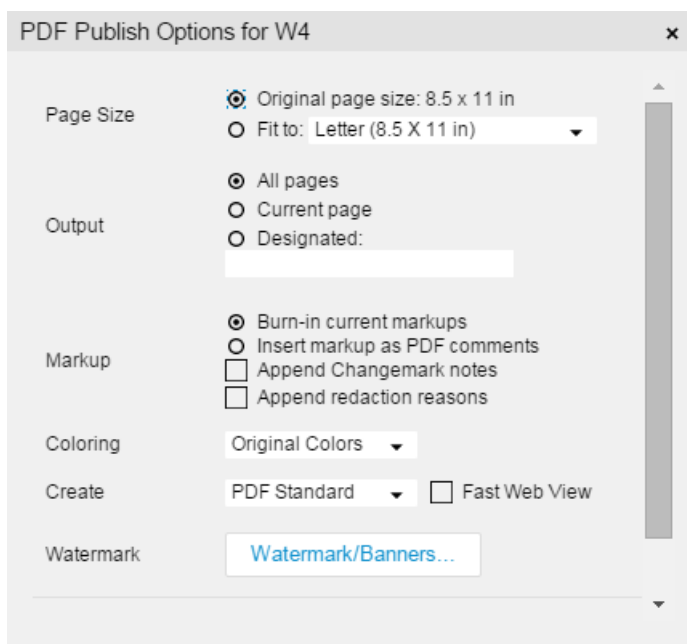
You can publish markups with any native files and output to PDF format. This means that when the publishing action completes, the markups, as well as the currently set [banners](#) are burned into the newly created PDF rendition and can never be closed or edited.



Note: If you are viewing in [binder](#) mode, the publish options dialog applies only to the current page's document, and that document is reflected in the title bar of the dialog.

To publish to PDF:

1. Open a file you would like to publish (with or without [markup](#) layers).
2. Click the drop down arrow on **Publish** and select **Publish to PDF**.



3. On the **Publish** Options dialog, select your desired publishing options:
 - a. In the *Page Size* area, select to print the original page size, or select a size from the **Fit To** drop down box to force the PDF output to fit a particular paper size.

- b. In the *Output* area, select whether to publish **All pages**, **Current page**, or you can enter **Designated** pages as page numbers or dashed page ranges separated by pipes. For example 2|5|6|10-14|18 publishes only the 9 pages specified, in the order entered.
 - c. In the *Markup* area, select how you would like to handle processing markups on the file.
 - Select **Burn-in current markups** to permanently burn in any open markups into the published output. They become a permanent part of the document image and are not PDF comments. Changemark notes are always transferred over as PDF Comments to allow the Changemark details to be reviewed with other PDF viewers.
 - Select **Insert markup as PDF Comments** to save any open markups as PDF comments. If markups are saved as PDF Comments, they can be altered from Acrobat Professional.
 - If Changemark notes are associated with the document, you can select to **Append Changemark notes**. When selected, the content associated with each Changemark note will print at the end of the print job as an appended page. Only the Changemark notes that fully appear in the printed output page will appear if the output page is a zoomed view. Each note receives a unique number that can be matched up to the text printout. Printed information includes the Changemark title, author, date and time authored, the note content, and discussion details.
 - If redaction entities exist in the current document, and reasons have been set, you can choose to append [redaction reasons](#) summary pages by selecting **Append redaction reasons**. When the published PDF file is viewed, the redacted entities display text with numbered references corresponding to each reason listed in the summary page.
 - d. In the *Coloring* area, select how you would like to handle publishing colors in the file for both the document and markup layer(s):
 - "Original Colors" -publishes with original colors
 - "Grayscale" - publishes in shades of black to white
 - "Lines as black" - publishes all lines black
 - e. In the *Create* area, you can choose:
 - **PDF Standard** - choose this option to create a standard PDF file.
 - **PDF/A-1b** -choose this option if you would like to create a PDF/A-1b compatible file.
 - **PDF/E** - choose this option if you would like to create a PDF/E compatible file.
 - **PDF/A-2b** - choose this option if you would like to create a PDF/A-2b compatible file.
 - Choose **Fast Web View** if you would like to enable this feature. Fast Web View restructures a PDF document for page-at-a-time downloading (byte-serving) from web servers. With Fast Web View, the web server sends only the requested page, rather than the entire PDF. This option is especially important with large documents that can take a long time to download from a server.
 - f. In the *Watermark* area, you can also choose to include *Publish* [watermarks and banners](#) in your published PDF file by setting these through the **Watermark/Banners...** button.
4. When you have chosen your desired options, click **Publish**.

- When publishing is complete, you are given the option to download and view the published file in your browser's default PDF viewer.

The selected pages, including any open markup layers, are published to PDF - not just the current view. Additionally, any banners or watermarks that are set will be burned into the output PDF file.

Publishing as TIFF

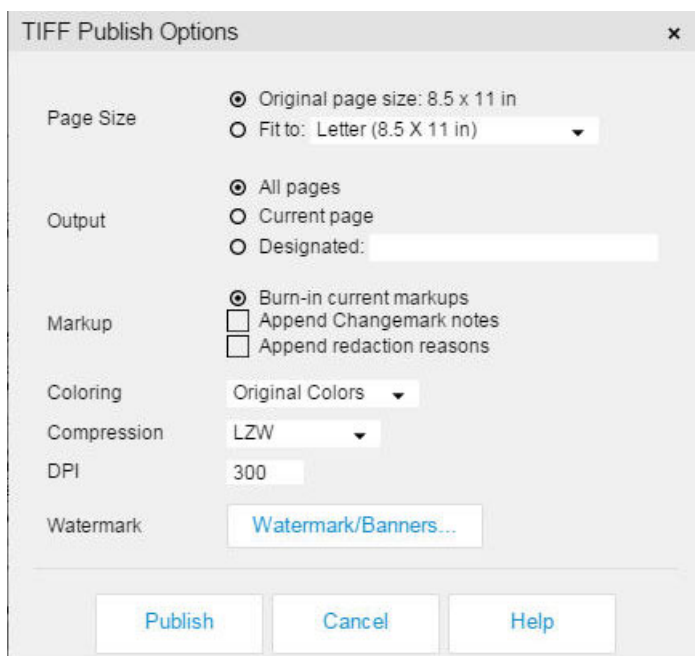
Brava! Enterprise HTML Viewer allows you to publish the currently viewed file (with or without open markups) in either PDF or TIFF format.



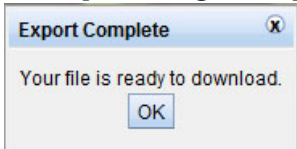
Note: If you are viewing in [binder](#) mode, the publish options dialog applies only to the current page's document, and that document is reflected in the title bar of the dialog.

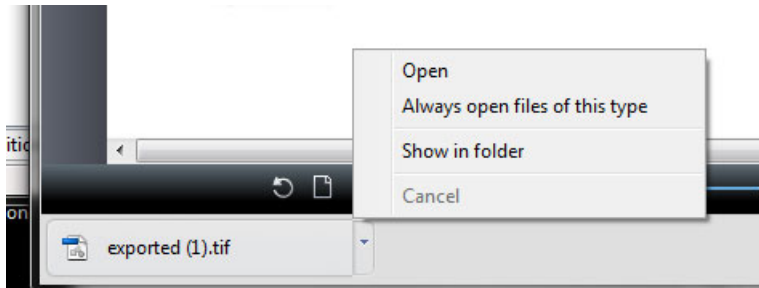
To publish as TIFF:

- Open a file you would like to publish.
- Click the drop down arrow on **Publish** and select **Publish to TIFF**



- On the **Publish** options dialog, select your desired publishing options:
 - In the *Page Size* area, select to print the original page size, or select a size from the **Fit To** drop down box to force the TIFF output to fit a particular paper size.

- b. In the *Output* area, select whether to publish **All pages**, **Current page**, or you can enter **Designated** pages as page numbers or dashed page ranges separated by pipes. For example 2|5|6|10-14|18 publishes only the 9 pages specified, in the order entered.
 - c. In the *Markup* area, select how you would like to handle processing markups on the file:
 - If Changemark notes are associated with the document, you can select to **Append Changemark notes**. When selected, the content associated with each Changemark note will print at the end of the print job as an appended page. Only the Changemark notes that fully appear in the printed output page will appear if the output page is a zoomed view. Each note receives a unique number that can be matched up to the text printout. Printed information includes the Changemark title, author, date and time authored, the note content, and discussion details.
 - If redaction entities exist in the current document, and reasons have been set, you can choose to append [redaction reasons](#) summary pages by selecting **Append redaction reasons**. When the published TIFF file is viewed, the redacted entities display text with numbered references corresponding to each reason listed in the summary page.
 - d. In the *Coloring* area, select how you would like to handle publishing colors in the file for both the Document and markup layer(s):
 - "Original Colors" - publishes with original colors
 - "Grayscale" - publishes in shades of black to white
 - "Lines as black" - publishes all lines black
 - e. **Compression** options are available from the drop down: Use the default LZW, or select a preferred compression type of JPEG, PackBits, or CCITFAX4.
 - The default resolution is 300 **DPI** (dots per inch). You may enter a preferred resolution in the text box provided. The minimum DPI value is 60 and the maximum is 1200.
 - f. In the *Watermark* area, you can also choose to include *Publish* [watermarks and banners](#) in your published TIFF file by setting these through the **Watermark/Banners** button.
2. When you have chosen your desired options, click **Publish**.
 3. When publishing is complete, an *Export Complete* message displays. Click **OK**.
 
 A screenshot of a Windows-style dialog box titled "Export Complete". The text inside says "Your file is ready to download." and there is an "OK" button at the bottom.
 4. You can now download and view the published file in your default TIFF viewer.




5. The selected pages, including any open markup layers, are published (burned in) to TIFF - not just the current view. Additionally, any banners or watermarks that are set will be burned into the output TIFF file.

Export to Word

[Changemark](#) conversations can be published into Word documents as Word comments. Brava! Enterprise HTML Viewer allows you to export the currently viewed .DOCX file as a Microsoft Word document (.DOCX) with any [Highlight Text with Changemark note](#) information contained in the associated markup file inserted as Microsoft Word comments.

An HTML viewer sample page is provided in the Brava! Enterprise SDK located in `...\BravaSDK\HTML\samples\round-trip-word\sample.html`

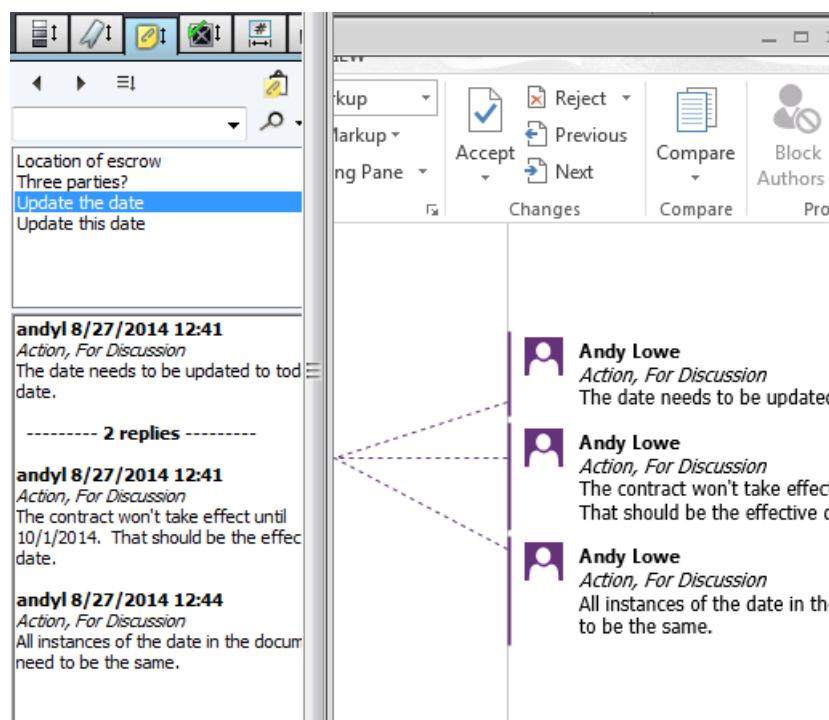
To export to Word:

1. Open a source .DOCX file and associated [markup](#) file containing Highlight Text with Changemark note entities that you would like to export as .DOCX format with comments.
2. Click the drop down arrow on  and select **Export to Word**.
3. When the publish is complete, only the text contained in any Changemark annotations of the associated markup file (opened for edit or review) are written to and included in the published .DOCX file as separate comments. Any and all other markup entities (if present in the markup file) are ignored.



Usage notes:

- The Export to Word feature is only supported with the Highlight Text with Changemark note tool.
- If the Changemark contains replies, each reply is placed as its own entity in the output file. Replies are placed in the chronological order they were made in Brava.
- The type and state of each comment and reply is included in the text of the Word comment.
- Word controls the color used for showing comments as an application-level setting and color setting in the Changemark entity is ignored.



Watermark/Banners

Banners are strings of specific information (date, time, page number, user name, etc.) assigned to a location on the document header and footer. The **watermark** is a semi transparent character string that stretches from the lower left corner to the upper right corner of the printed or published document.

Banners and Watermarks can be used to support ISO 9000 and QS 9000 quality standards. They can contain text strings, [token](#) values, or optionally (through integrations API), metadata fields from document management and product life management systems can be extracted and inserted into the banner or watermark. With 12 possible banner locations, you can add as much text as you need to provide sufficient traceability and status.

Any of the banners or watermarks may be defined (added) by the administrator or by you. Any strings that have been set by an administrator (specified on the server or in the security XML file) will not be editable if this restriction has been set.

Banners and watermarks display on the published output PDF or TIFF file (electronic), and on the printed output.

See Also:

[Use Tag values](#)

[Add/edit a banner or watermark](#)

Adding, Editing Watermarks/Banners

You can add, edit, or clear banners or the watermark if they have not already been defined on the Brava! Server or in the html parameters.

Banners and watermarks display on the PDF or TIFF published output file and not on the viewing screen (except in the Watermark/Banner dialog preview). Set banners and watermarks also display on the printed output.

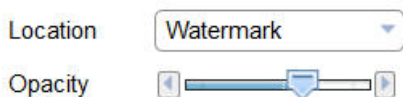
To access the watermark and banners dialog, either:

Click  -> **Publish to PDF** or **Publish to TIFF** on the task bar and select **Watermark/Banners...** from the *PDF/TIFF Publish Options* dialog.

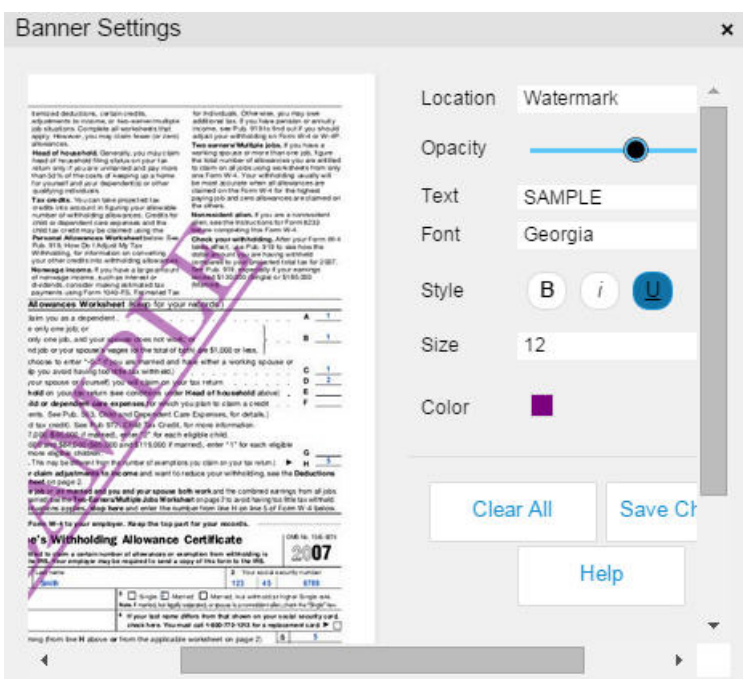
Click  and select **Watermark/Banners...** from the *Print Options* dialog.

To set the banners and watermark:

1. Select a banner **Location** (e.g., Top Left) from the drop down or select Watermark to set the watermark string.
2. Type in the desired **Text** string or enter a [token](#). You can use multiple tokens in one banner or watermark string (for example: %Date %Time).
3. Select your desired **Font** settings from the font name, style, size, and color drop downs.
 - Watermark font size is not affected by your font Size selection (this option affects banner strings only).
 - Opacity only affects the opacity of the Watermark string and not the banner strings. Drag the slider to the left for a more transparent watermark, to the right for a more opaque one.



4. The preview screen is automatically updated with each change. Click **Save Changes** to apply your changes and close the **Banners** dialog box. The **Clear All** button clears all editable banners and watermark that were set by you or the integrator in the signed config.



See also:

[Using Tag values](#)

[About Banners and Watermarks](#)

Using tokens

[Print banners and the watermark](#), as well as [markup stamps](#), can contain text strings or one of the available token values below.

%Date - Inserts the date the print was spooled. If the tags are viewed on screen, the time at which the screen was last refreshed displays.

% SysDatePlusDays(x) - Inserts a date the specified number of days past the system date. Replace "x" with the desired number of days. Negative numbers of days may be entered. Be sure to close the parenthesis when you add the number of days.

%Time - Inserts the time the print was spooled based on a 12 hour clock (AM/PM). If the tags are viewed on screen, the date on which the screen was last refreshed displays.

% MilTime - Inserts the time the print was spooled based on a 24 hour clock.



Note: All of the date and time specific tokens above are based on the current UTC time.

%Title - Inserts the name of the file.

%Page - Inserts the page number.

% TotalPages - Inserts the total number of pages.

%Login or **%User** - Name of the user that the viewer is currently operating under from the signed configuration or viewer option.

%Hostname - The location.hostname of the server url which is hosting the Brava! HTML Viewer.

%IPAddress - IP Address from the signed configuration returned from the server.

%BatesPgNo(x) - Bates Number. This tag is used to indicate the starting page number and the number of digits to use. For example, %BatesPgNo(0002) would place 0002 on the first page, 0003 on the next page, etc.

%% - Inserts a single % character.

%DBString(x) - This tag is used to resolve custom tags for products that integrate with Brava!. Replace "x" with any printable character except a right parenthesis, ")". See notes below.

%DBUpdateString(field label) - Used when creating markup stamps to resolve custom integration values during the review process. This tag inserts a corresponding field label value (Priority, Status, etc.) from the integration's database tables when a user either inserts a [markup stamp](#), or double clicks on a markup stamp containing a %DBUpdateString token in the markup text string. The method for resolving these tokens is determined by the integration's needs, and can include using a dialog or a non-interactive method. If %DBUpdateStrings are not resolved, they are given a default answer which is displayed with the resulting markup stamp. See example below.



Usage Notes

- You may use multiple, differing tokens in any single banner or watermark string (for example **%Date %Time %Title** might result in the string **7/14/2010 3:03 PM MyDocument.pdf**). The tokens can be used in conjunction with additional words and spaces. For example **Today is %Date, at exactly %Time** results in **Today is 7/14/2010, at exactly 3:03 PM**
- Tag values are case insensitive.
- A Bates Number is considered to be both the prefix and the page number WITH leading zeros. To create a bates ID, you can add text preceding the tag. For example, **Smith vs. Jones%BatesPgNo(00001)** would result in Smith vs. Jones000001 being printed on the first page, Smith vs. Jones000002 printed on the second page, etc.
- Using the **%DBString(x)** token allows you to incorporate database attributes into your watermarks and banners. For example, the following show the resulting printed string of various typed input:

Input: This document was created on **%DBString(r_creation_date)** by **%DBString(owner_name)**.

Output: *This document was created on 11/15/2007 by John Johnson.*

Input: Document "**%DBString(object_name)**" was modified by **%DBString(r_modifier)** on **%DBString(r_modify_date)**.

Output: Document "neo.doc" was modified by Pat McDonald on 1/12/2004.

Input: Reviewed and Approved, Version %DBString(r_version_label)

Output: Reviewed and Approved, Version 1.6

- When inserting dynamic stamp tokens into markup text strings, an integration can use the custom **%dbupdatestring(field value)** token in the stamp template to allow communication with the integration database and to dynamically update the stamp's field label values when the stamp is inserted into a markup, or when a reviewer double clicks on the inserted [markup stamp](#). For example, the following tokens:

%dbupdatestring(Date)

%dbupdatestring(Time)

%dbupdatestring(Author)

%dbupdatestring(Priority)

%dbupdatestring(Status)

Produce the following table model:

Field Label	Value
Date	May, 08, 2012
Time	13:00:31
Author	Joe Smith
Priority	HIGH
Status	REVIEW

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Contact information

If you need information on integrating and customizing Brava! Enterprise or if you experience any problems or have any general inquiries, please feel free to contact us.

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