



# Welcome to iAnnotate v 1.5!

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# 1: Getting Started

Welcome to iAnnotate! This section will introduce you to the interface and features of iAnnotate.

In addition to this User Guide, iAnnotate includes an integrated help system, including [Tips](#) that will help guide you through all of the features of iAnnotate. For more detailed information, see the rest of this User Guide; or, for troubleshooting tips or support requests, visit the [Aji Support Site](#).

## 1.1: QuickStart Guide

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New to iAnnotate? Use the following steps to get started working with your PDF documents; or see the rest of this User Guide for more detailed information.

1. **Get Documents:** Get PDF documents onto your iPad from [E-mail](#) by tapping on attachments, from the [web](#) using our integrated web downloader, from your [Dropbox or WebDav](#) account, or from your computer using the [Aji PDF Service](#) or [iTunes USB file sharing](#).
2. **Find your Documents:** Whether you have one or thousands of PDFs, iAnnotate makes it easy to find exactly what you're looking for with the [Document Manager](#). The Document Manager allows you to locate and organize your documents. Use [Document Search](#) to search the full-text of all your documents instantly. Or search by the document names and tags that you have added to your documents. You can also organize PDFs into favorites, recently read documents, new documents, and more.
3. **Read:** Use the [tabbed reading](#) interface to open and quickly switch between multiple documents. Use the many [navigation](#) options to find your way around documents.
4. **Annotate:** Use the toolbar commands, or tap-and-hold on the PDF to bring up the popup context menu for adding [annotations](#). Once annotations are created, use the popup annotation editor to read, modify, or delete your markup.
5. **Share your Notes:** When your notes are finished, tap the Mail button on the left-hand top toolbar. From here you can [e-mail your annotated PDF](#), view or e-mail a text-only [annotation summary](#), or upload your annotations to the Aji PDF Service on your computer.
6. **Customize:** Once you've gotten the hang of iAnnotate, you may wish to [customize](#) it for the tasks you do most! Use the toolbar customization interface to edit the number of toolbars, their size, transparency, location, and command buttons. Also, there are many [Settings](#) to fine-tune the behavior of iAnnotate.

## 1.2: Using the iAnnotate Interface

### 1.2.1: Top Toolbar

The **Top Toolbar** of iAnnotate allows you to work with your on-device document library, and also control the iAnnotate interface and settings.

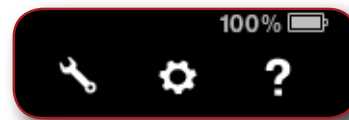
The [Library](#) icon in the upper-left gives you access to your document library -- use this to find and open new document tabs. Next over is the Download icon, where you can get documents from your computer using the [Aji PDF Service](#), the [web](#), or a [Dropbox or WebDav](#) account. The [Upload](#) icon allows you to upload all annotated documents to your computer using the Aji PDF Service, or to [prepare your documents](#) for upload if you're using iTunes file sharing.

The [E-mail](#) icon allows you to send out the currently viewed document via e-mail. You can also use this to mail out the [annotation summary](#).

In the upper-right corner of the screen are icons for controlling iAnnotate behavior. Use the wrench icon to [manage your toolbars](#), and the gear icon to access and change [Settings](#). The ? icon gives you access to iAnnotate's [interactive help](#) system, and links for more information about iAnnotate.



Left top toolbar



Right top toolbar

### 1.2.2: Document Toolbars

Most of the tasks you will use in your daily work in iAnnotate can be done with the **Document Toolbars**. For example, to create a [Note](#) annotation in an open document, tap the Note icon on the annotation toolbar on the right-hand side, and then tap the location of the document at which you'd like your Note to appear. After creating the Note, you can edit it using the popup annotation editor. Most annotation tools work in a similar manner, and there are tips to guide you along the way.

iAnnotate also allows you to [customize](#) your toolbars by tapping the wrench in the top toolbar. Now you can use the [grabbers](#) on either side of the toolbar to drag them to a different edge of the screen. Or, use the [Edit](#) (gear) icon on the edge of the toolbar to change its appearance and the buttons that it uses. You can choose from a variety of different commands, and set up the toolbars so that they have exactly the tools you want to have ready at your fingertips.



Master icon

You may access infrequently used commands with the **Master** button on your toolbar, which brings up a selection of all currently-available commands.



When editing toolbars, you can also tap the Add button in the lower-right corner to add another toolbar. iAnnotate comes with several useful pre-defined toolbars, or you can create your own custom toolbars from scratch.



Document Toolbar

### 1.2.3: The Navigation Panel



Navigation Panel toolbar button

The **Navigation Panel** allows you to quickly move throughout your document and locate content by thumbnails, bookmarks, PDF outline, annotations, or with full-document search. To access the Navigation Panel, tap the Navigation Panel mini icon to the left of the tab buttons. See [5.2: Document Navigation](#) for more information about using the Navigation Panel.



Nav Panel mini icon



To navigate with [Thumbnails](#), choose the **Thumbnail** view option from the view selector buttons. Tap any thumbnail to move directly to that page in the document, or use the scroller on the left to move to a different part of the document.



Tap **PDF Outline** to navigate with the embedded PDF [outline](#) of a document as well as any Bookmarks that have been created.



Select the **Annotations** view option to display a list of any [Annotations](#) that you've added to the document. Each annotation will be listed with the annotation type, color, page, and descriptive text.



Tap **Search** to [Search](#) the full-text of the document.

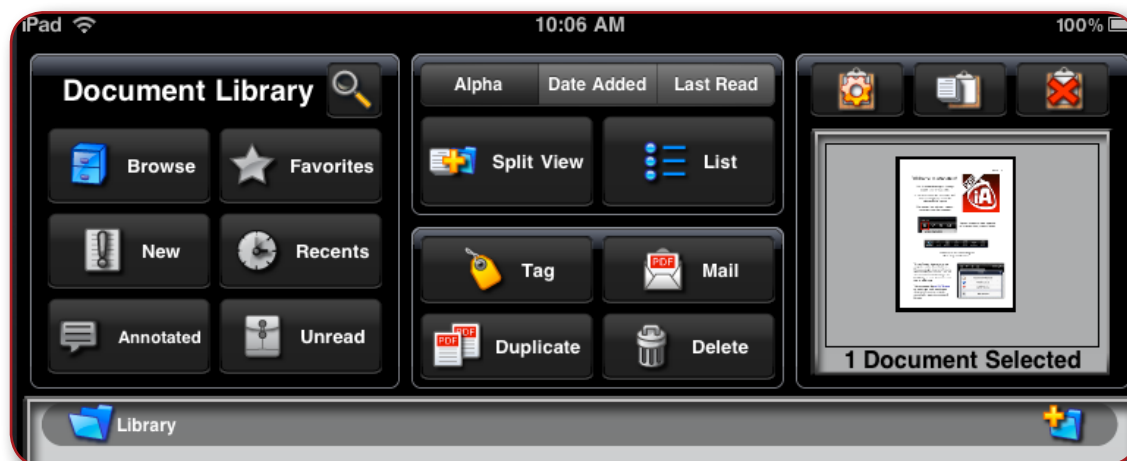
### 1.2.4: Opening Documents



Library button

Use the **Library** button in the upper-left corner to open the [Document Manager](#), where you can locate and open documents in your on-device library. Tap any document to read it. Or, use a two-finger-tap on any document to preview. To exit the Document Manager, tap the Done button at the bottom of the screen. Tap the ? for in-app help with any item on screen.

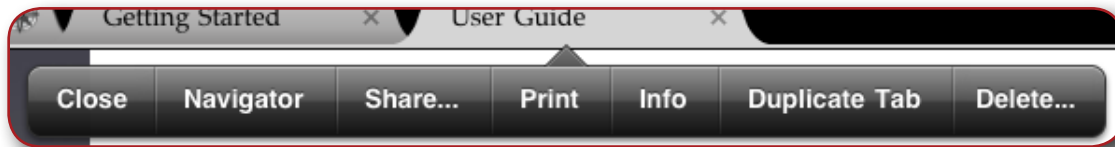
(See [3: Transferring Documents into and out of iAnnotate](#) for more details on obtaining new documents.)



The Document Manager

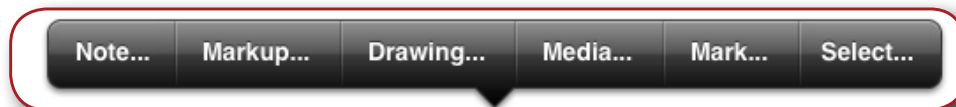
## 1.2.5: Using Context Menus

Many actions in iAnnotate can be performed using context menus. For document-level actions, tap the tab of the currently open document to access the [Document Context Menu](#). (You can also tap-and-hold the tab of an inactive document to bring up the context menu without switching to it.) This will give you options for navigating and sharing the document, getting more info, closing the tab, or deleting the document.



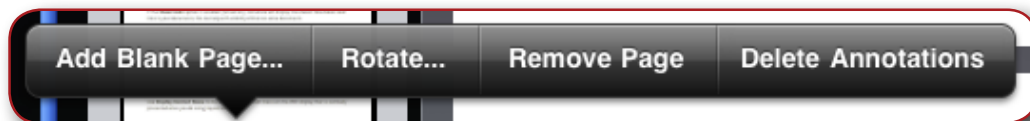
*Document Context Menu*

You can also access common [annotation](#) actions from the [Annotation Context Menu](#) on the PDF display itself, by doing a tap-and-hold anywhere on the document display.



*Annotation Context Menu*

When using the [Navigation Panel](#) in Thumbnail view, tap and hold on any thumbnail to bring up the Thumbnail Context Menu. The Thumbnail Context Menu includes options for altering the structure of your PDF document.



*Thumbnail Context Menu*

## 2: In-app help

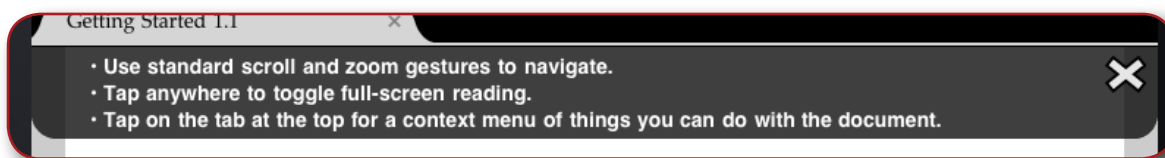
iAnnotate includes several ways to help you become familiarized with the features and interface.

### 2.1: Tips

First, iAnnotate uses Tips to help guide you through the process of learning the interface and features of iAnnotate. Tips drop-down over an area of the screen and describe some aspect of the iAnnotate functionality as you encounter it.

Tap the tip in order to hide it, but to be reminded later. If you wish to never see the tip again, tap the X button in the upper-right corner of the tip.

 You can disable Tips completely under [Notification Settings](#). Also, if you wish to reset the list of tips, you can do so by turning off the Show Tips setting then turning it back on.



Sample Tip

### 2.2: Interactive Help

iAnnotate also includes interactive help. Tap the ? icon in the upper-right corner, then choose Interactive Help. This puts iAnnotate in Help Mode -- you can now tap anything on the screen to get help on how to use it and what it does.



Help button

You can also access help in various other areas by tapping the ? button, including the PDF [Information](#) screen, the [Settings](#) menu, and while [customizing](#) your toolbars,

### 2.3: Further Resources

For further help, troubleshooting tips, or support requests, please visit the [Aji Support Site](#).

## 3: Transferring Documents into and out of iAnnotate

### 3.1: E-mail

You can download PDF attachments from the Mail application into iAnnotate. In Mail, tap-and-hold the icon for the PDF attachment, and then choose Open In... iAnnotate – or, if you have other PDF applications installed, you may have to choose the Open In... option and then select iAnnotate from the list.

You can also tap the PDF to preview the document directly in the Mail app, and then tap the Open in iAnnotate or Open In... button in the upper-right corner to open the document in iAnnotate.

In either case, this will launch the iAnnotate app, and then open the attached PDF in a new tab.



If your attached PDF is one-page only, tap-and-hold in order to use Open In... to open it in iAnnotate.

PC users can now read and annotate their Microsoft Word (.doc) and Microsoft PowerPoint (.ppt) documents with iAnnotate! Tap-and-hold the attachment to use Open In..., iAnnotate will convert the .doc or .ppt document into PDF format, and add it to your Document Library.



Opening a .doc file in iAnnotate

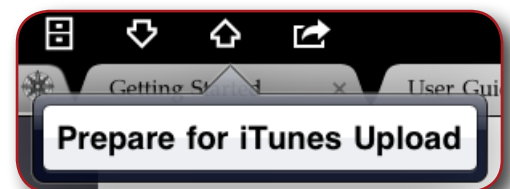
To e-mail your annotated documents, use the Mail icon in the top toolbar. These actions can also be accessed through the [Document Context Menu](#) or the PDF [Information](#) screen. See [7.1: Mailing Annotated Documents](#) for more details

### 3.2: Using iTunes USB file transfer

You can use the iTunes file sharing feature to transfer documents into and out of iAnnotate.

This is convenient for quickly transferring a few files, but if you are transferring a lot of documents, we highly recommend using the [Aji PDF Service](#). This free companion application allows you to preserve your existing document folder structure, easily download new documents only, upload your annotated documents back to their original locations, and also performs a lot of the [processing](#) required so that iAnnotate doesn't have to.

In order to transfer using USB, you must have your iPad connected to your computer using iTunes. In iTunes, click on your device in the Devices section, and then click on the Apps tab. Under the Apps tab, find the File Sharing section (you may have to scroll down to the bottom of the page), and then click on the iAnnotate PDF entry in the list.



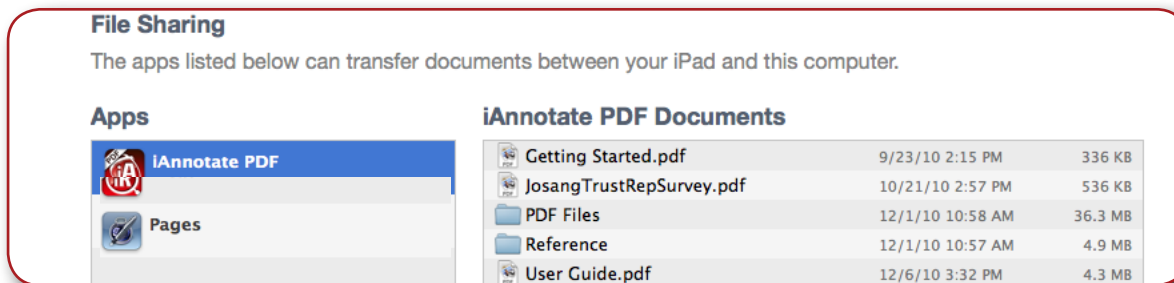
Upload button

To move a PDF document from your computer to iAnnotate, drag it into the iAnnotate PDF Documents



area on the right, or use the Add... button to locate a document on your computer. Due to the limitations in iTunes file sharing at this time, it is not possible to transfer folders -- only individual PDF documents. (You can multi-select and drag many PDF documents in at once, but no folders will be preserved.)

! You can transfer Microsoft Word (.doc) and Microsoft PowerPoint (.ppt) documents as well as PDF documents. Add the file following the steps above, and iAnnotate will convert it into PDF format. You can then read and annotate the file as usual.



*Transferring documents via iTunes*

Transferring a document back out from iAnnotate is a two-stage process. First, if you want to be able to see your annotations, you need to let iAnnotate know that you wish to transfer the documents out, so that it can embed your annotations back into the PDF. To do this, simply choose the Prepare for iTunes Upload option from the Upload button in the top toolbar. This will make sure all of your documents are ready for transfer and write all the annotations you have added into the PDF files. (You can also prepare a single document at a time, using the Prep For iTunes button in the PDF information screen.)

After your documents are prepared, you drag documents or folders out of the iTunes File Sharing area, or use the Save to... button to select the location to save on your computer.

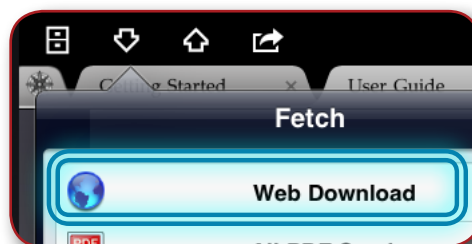
## 3.3: Downloading documents from the Web

### 3.3.1: Using the Integrated Web Downloader



*Web Download button*

To use the integrated Web Downloader, tap the Web Download option under the Download Menu in the top toolbar or use the **Web Download** toolbar button. This will bring up a web browser, which you can use like Safari. Enter a URL or search terms to find a page with the PDF document(s) you'd like to download.



*Download documents from the web*

The integrated browser will automatically detect when you navigate to a PDF link, and then download the linked file into your document library. If the browser is having trouble detecting PDF links on a particular website, turn on **Compatibility Mode**.

Compatibility Mode can be found on the **Action Button Menu**. In Compatibility Mode, browse until you have loaded a PDF in the integrated browser. Then, tap the Action button and choose **Download PDF**.

Once downloaded, you can use the arrow button in the lower left to open and read the document; or, you can continue browsing and downloading new documents.

Read: 2010-Summer-Hoodoo.pdf

Arrow button



If you are downloading a particularly large PDF, you can close the Browser screen (X in the upper-right) and go back to iAnnotate, and the download will continue. You will be notified when the download is complete.



You cannot leave the iAnnotate application, or else the download will be cancelled.

Another option you have is to convert a webpage itself to PDF format. Tap the Action button and then choose **Save Page as PDF**. iAnnotate will then copy the contents of the webpage and convert it into PDF format. The PDF will be saved to your [Document Manager](#), and you may read and annotate it as usual.

### 3.3.2: Using Safari

You can open PDF documents in iAnnotate directly from Safari by using iAnnotate's built-in URL handlers. Once you've accessed a PDF document in Safari (or any web page), tap on the URL bar to edit the URL. Scroll all the way to left (you may need to tap-and-hold to bring up the cursor, then move left to scroll), and then add an "a" to the front of the URL – so that, for example, it reads "ahttp://myurl/...", or "ahttps://myurl/...". Then tap the Go button – this will launch iAnnotate and open the PDF or web page that you were viewing in iAnnotate.



If you are browsing to an authenticated site, you may be required to log in again from the iAnnotate integrated browser before being allowed to download the requested files.




### 3.4: Working with other applications

iAnnotate allows you to transfer PDF documents from other applications that support the Open In... feature, and also allows you to transfer documents out of iAnnotate to other apps that support the Open In... feature.

To open a PDF in iAnnotate from another app, you'll need to consult that application's instructions. Usually there will be an Open In... command or a way to access it similar to the [Mail](#) app. Choose iAnnotate from the list, then iAnnotate will launch and display the requested document.

If you have another PDF application on your device that supports App Sharing, you can transfer your documents from iAnnotate using the Open In.. functionality. Tap on the tab for your document, choose Share., then Open In., and then select the desired application from the list. (Choosing iAnnotate here will not do anything -- it is displayed there by default by the device operating system.)

 Most iPad PDF applications do not have the ability to display PDF annotations, so your annotations may not display in other iPad apps. They are present in the PDF document, however, and will be visible if they are viewed in any standard PDF viewer such as Adobe Reader or Mac Preview.

### 3.5: Working with Dropbox and WebDAV

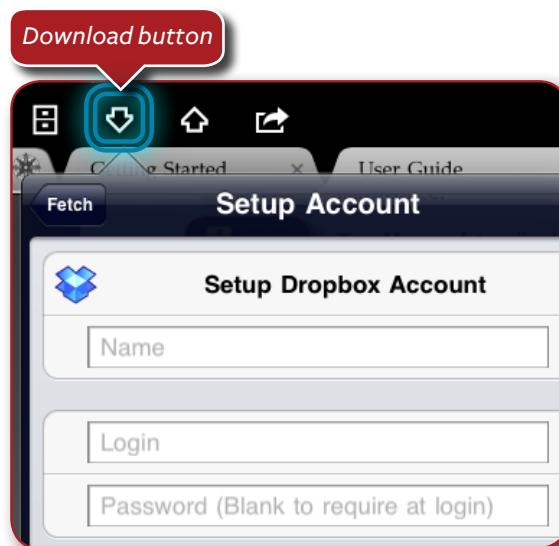
iAnnotate offers easy access to documents stored in online file sharing accounts such as Dropbox and WebDAV. To begin, tap the **Download** button in the top toolbar and choose the Create Account option. You may also create new account by tapping the + button in the upper-right of the Download menu. Select the desired account type, either Dropbox or WebDAV, and enter the account information, including a name to be used within iAnnotate. You can optionally specify a password or leave it blank to be prompted each time you access the account.

Once your account is created, it will appear on the download menu. Tap the account to log in and browse your files. You can navigate and download individual PDFs; or tap the orange Download arrow on a folder to download an entire folder.



Edit account

After you've created an account, you may edit the account information, or delete it entirely, by tapping the **Edit** button on the upper-left of the download menu.

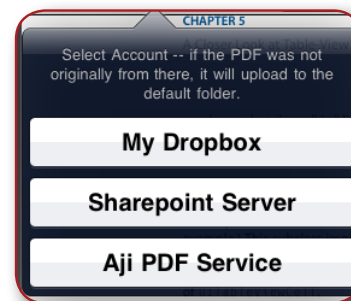


Add Dropbox account

### 3.5.1 Uploading to Accounts

There are two ways to transfer PDFs to your Dropbox or WebDAV accounts.

The first way to upload an individual PDF to an account is with the [Document Context Menu](#). Tap-and-hold the tab of the PDF you'd like to transfer to open the Document Context Menu. Then, select **Share...** followed by **Upload...** At this point, if you have more than one account configured, select the specific account to which you would like to upload the PDF.



Select account

- ⚠ If you choose the account from where you got the PDF originally, it will be uploaded into the folder from which it was originally downloaded into iAnnotate. However, if you choose a new account for the PDF, it will be uploaded into the default uploads folder for that account, which for WebDAV and Dropbox accounts is called “iAnnotate PDF”.

The second way to upload PDFs to an account is via the **Upload** icon on the top toolbar. In the Upload popup menu, tap **Upload To Account**. When you choose this option, you can select among your configured accounts (including [APS](#)). This will upload *all* modified PDFs that you originally downloaded from the selected account back into that account -- and *only* PDFs originally from that account.

- ⚠ NOTE: The PDFs that you currently have open for reading are irrelevant when using this button; this button is for “syncing” all new annotations back into an account whether the annotated PDFs are open or not.

## 3.6: Using the Aji PDF Service

iAnnotate allows you to transfer your entire PDF Library to your iPad using the free Aji PDF Service (APS).

The Aji PDF Service provides a fast and convenient way to transfer PDF documents between your computer and your iPad. It also processes PDF files for iAnnotate and provides the information required to support some of the advanced features of iAnnotate, such as [Document Search](#), [Library Search](#), and accessing PDF [annotations](#) and [PDF Outlines](#). For more details on this process, see the [PDF processing](#) section.

The Aji PDF Service is available as a free download for the [Mac](#) and [Windows](#) platforms.

### 3.6.1: Installation

#### Install on Mac


To install the Aji PDF Service, download the [Aji PDF Service for Mac](#), and double-click to mount the Disk Image. Then drag the Aji PDF Service icon to your Applications folder.

That's it! To launch the Aji PDF Service, go to your Applications folder and double-click Aji PDF Service. For more details on using the service to share documents, see the [Sharing](#) section below.

## Install on Windows

To install, download the [Aji PDF Service for Windows](#), double-click, and follow on-screen instructions. Note that you may have to grant the installer permission to install files. As part of the installation, the installer will set up [Bonjour for Windows](#), which is required to facilitate communication between iAnnotate and the Aji PDF Service. The installer will launch the Aji PDF Service when complete.

That's it! You can find the Aji PDF Service in your Start Menu, under the Aji Programs group.

 The Aji PDF Service uses a network connection to communicate with the iAnnotate, so you may have to approve the Aji PDF Service with any firewall software you have set up. Please contact our [Support Team](#) at any time if you are have any troubles with your security or firewall setup, or if you are having troubles getting the iAnnotate app and Aji PDF Service to communicate.

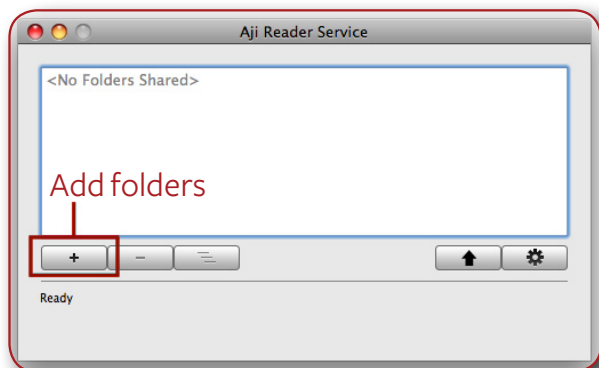
For more details on using the service to share documents, see the [Sharing](#) section below.

### 3.6.2: Sharing Documents

The Aji PDF Service works by sharing folders on your computer that contain PDF documents. You can choose any number of folders to share, and any PDF documents in the shared folders (or any subfolders) will be available for download by the iAnnotate application.

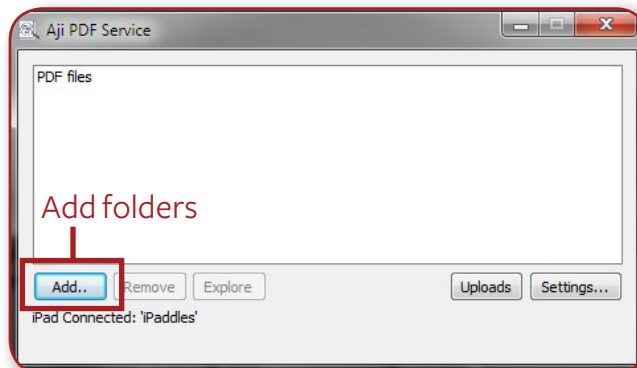
The Aji PDF Service displays the list of shared folders in the white box in the middle of the application window. Use the Add button to choose a new folder to add:

#### Mac:




Adding a new Shared Folder

#### Windows:



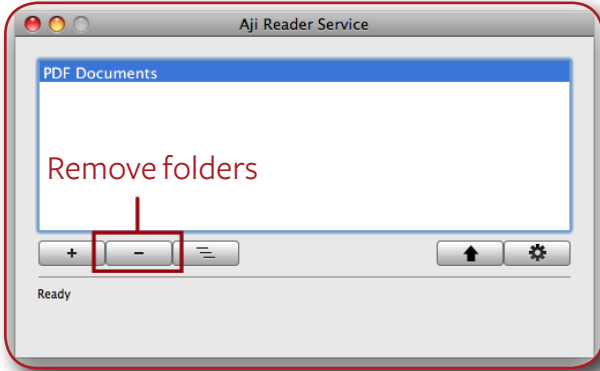
Adding a new Shared Folder

 The Aji PDF Service works with folders only, and not individual PDF files. If you wish to share an individual PDF file, simply share the folder in which it resides. Then, when accessing your shared folders, you can choose to download only an individual PDF document, as described in the [Transferring Documents](#) from the Aji PDF Service section below.

You can add as many different folders to the list as you like. iAnnotate will synchronize all your PDF documents in those folders as well as in any subfolders.

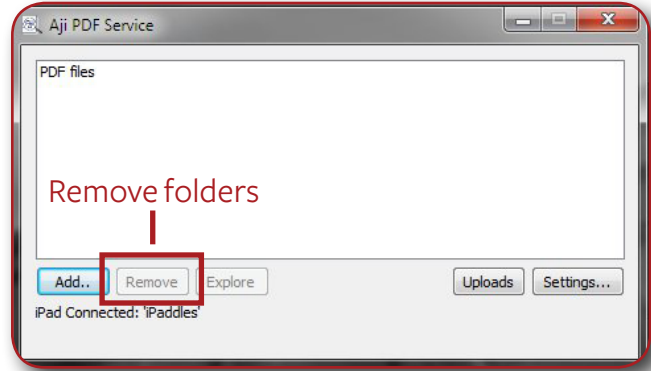
You can also use the Remove button to remove folders from the shared list after highlighting the folder to be removed.

**Mac**



*Removing a Shared Folder*

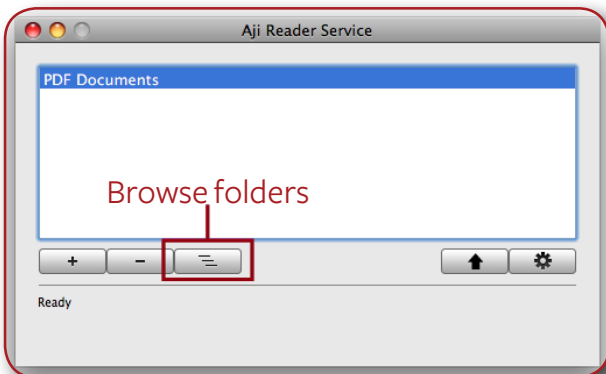
**Windows:**



*Removing a Shared Folder*

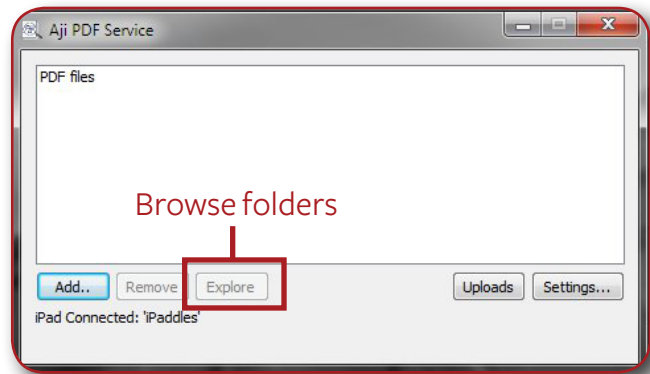
On the Mac, you can also use the Browse button to locate the folder on your computer. Use the Explore button in Windows.

**Mac:**



*Browsing for a folder*

**Windows:**



*Browsing for a folder*

When you have finished transferring documents to iAnnotate, you may quit the Aji PDF Service; the service is only required when fetching new documents from your computer.

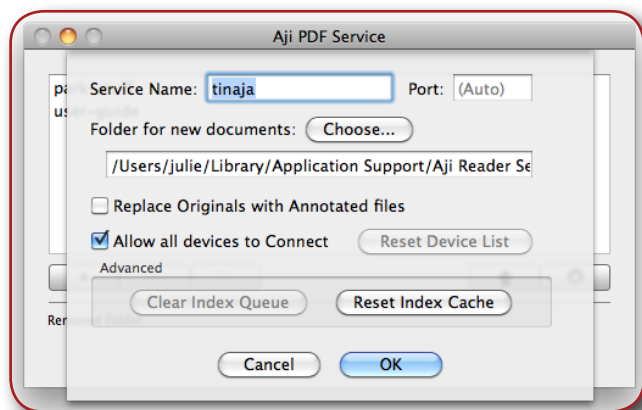
### 3.6.3: Settings

The Aji PDF Service includes a few settings to fine-tune its behavior. These are accessed from the Settings button on the right side of the Aji PDF Service main screen:

#### Changing the Service Name

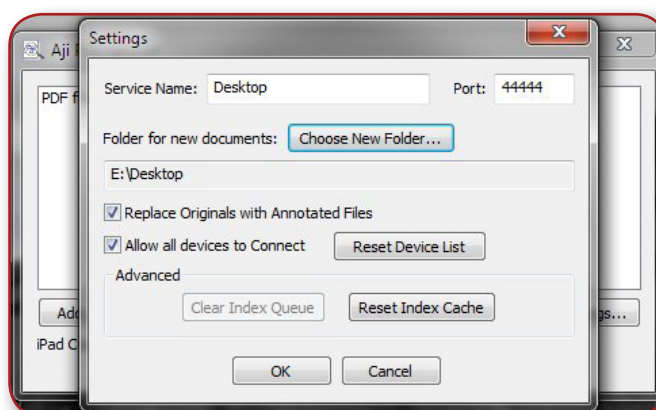
The Service Name controls how your server appears from iAnnotate; usually the default is acceptable, but you may wish to change this setting here.

##### Mac:



Changing the service name

##### Windows:



Changing the service name

#### Configuring the Uploads Folder

When PDF documents are obtained via some method other than Aji PDF Service, they will be placed in the Uploads folder when transferred to your computer by Aji PDF Service. If you wish to change the location of the Uploads folder, you may do so by clicking on Choose New Folder and then browsing for the preferred location. This is especially useful if you frequently wish to access PDF documents on your computer that were downloaded from the web or e-mail with iAnnotate. Otherwise, you may leave the Uploads folder at the default location.

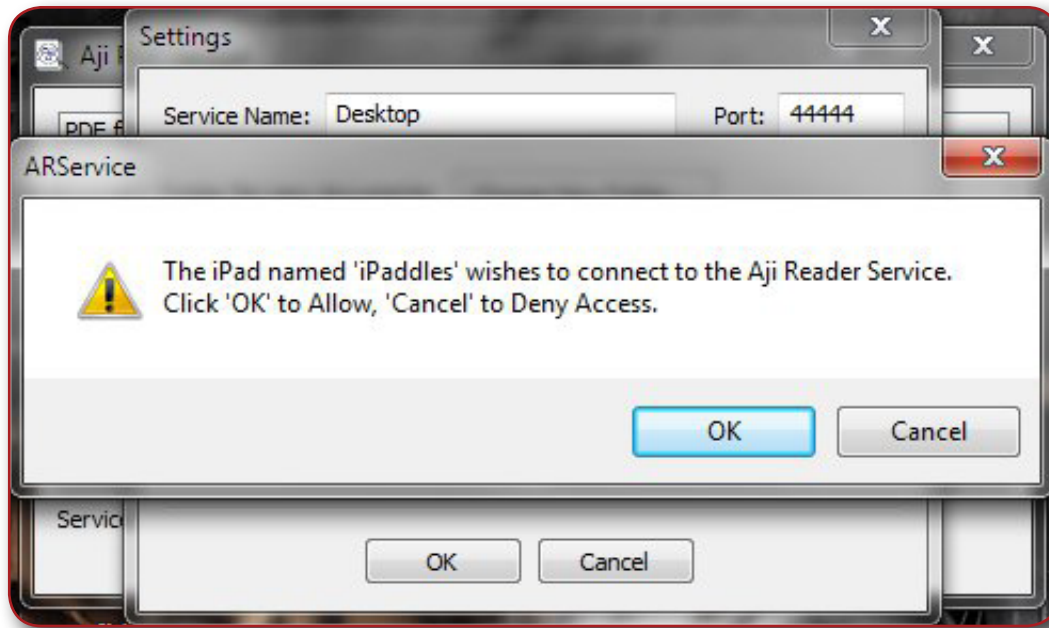
#### Device Authorization

By default, the Aji PDF Service allows any device on your local network to connect and download PDF documents from your computer. This is the easiest approach for most users, and is safe in home network environments.

Some users, however, will wish to control access to their shared documents and ensure that only authorized devices are allowed to connect. If you wish to do this, uncheck the Allow all devices to connect check box. Also, you will probably want to use the button to reset the list of authorized devices just in case an unknown device had been previously authorized.

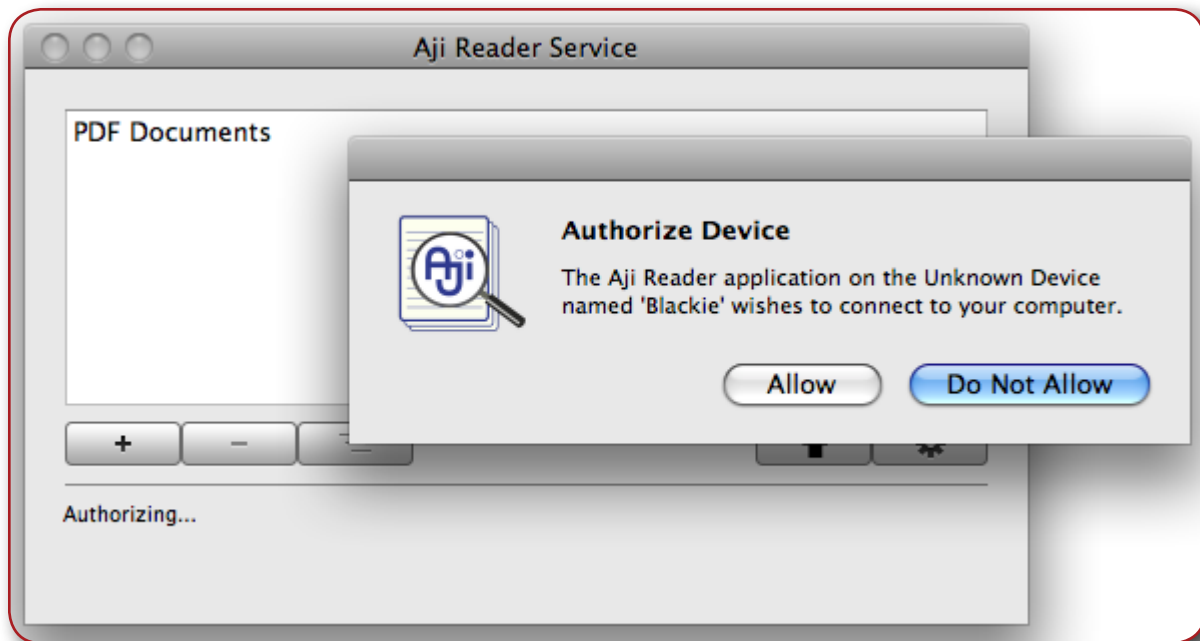
When your device first connects and authorization is required, the Aji PDF Service will request confirmation before sending any data to the device:

**Mac:**



*Authorize Device*

**Windows:**



*Authorize Device*

⚠ A device only needs to be authorized once; after initial authorization, the device is always allowed to make subsequent connections. If you wish to de-authorize a device, use the Reset Authorized Devices button under Settings.



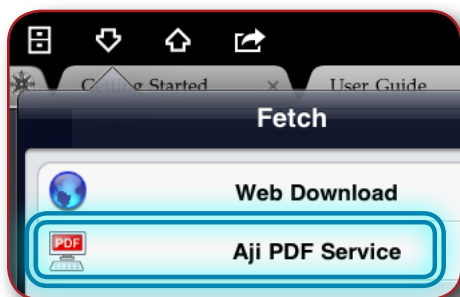
### 3.6.4: Troubleshooting

If you are having trouble locating your computer under Get Documents or transferring documents to iAnnotate, we have several resources to help you get running.

First, please see our [FAQ](#) which includes troubleshooting tips for getting iAnnotate connected to the Aji PDF Service.

Finally, Aji support is also available to help -- you can [e-mail us directly](#).

## 3.7: Transferring documents using APS



The Download Menu

Once you have your computer set up with Aji PDF Service, you can transfer documents from your computer using the Aji PDF Service option from the download menu in the top toolbar.

Choose your computer from the list, and then you navigate your files and folders and download by tapping files or using the orange download button on folders. You can also download all new files on your computer at once using the orange download button on the computer name in the top level of the APS section.

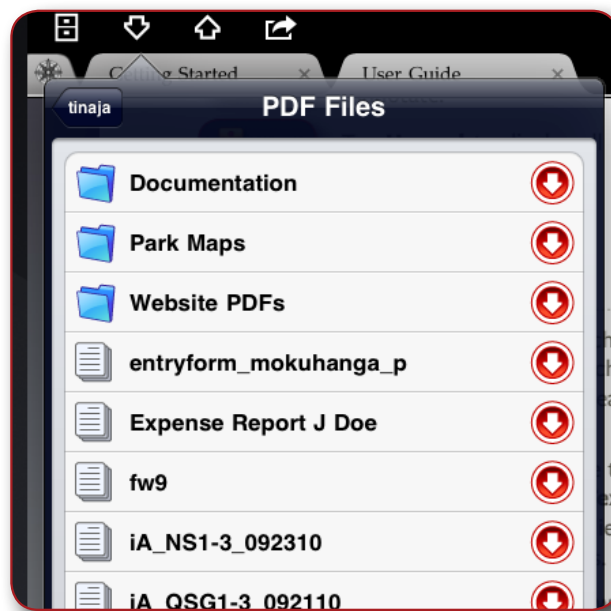


Downloading all of the files on the computer or in a folder will only download new files, so you can use this to sync your iAnnotate library with your desktop computer.

You can upload all of your annotated documents back to APS using the Upload to APS option in the upload menu -- this will upload only documents with new annotations that have not yet been transferred to your computer using APS. You can also upload one specific PDF using the Tab context menu or the PDF Information screen.



If you wish to use APS while you are not on a local network, you can set up custom APS host and port settings in iAnnotate under Advanced settings. The port will need to match the custom port specified in your APS settings, and the hostname will need to be a valid network-reachable address of the computer running APS.



Selecting Documents or Folders to download

## 3.8: Printing Documents



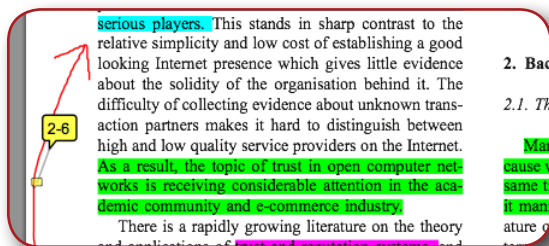
Print &  
Print Current  
Page buttons

iAnnotate allows you to print in-app with the iPad iOS 4 AirPrint feature. AirPrint allows your iPad to wirelessly connect to any AirPrint-enabled printers on your wireless network. For more information about AirPrint as well as a list of HP AirPrint-enabled printers, go to <http://support.apple.com/kb/HT4356>.

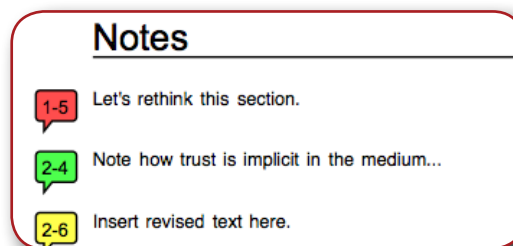


You must have iPad iOS 4 or higher installed on your iPad as well as an AirPrint-enabled printer in order to print via AirPrint.

To print a document, select Print from the Sharing menu, the [Document Context Menu](#), or tap the **Print** toolbar button. This opens the Sharing Options dialog box where you can adjust the print options. There are two format options for printing: **Flattened** or **Original PDF**. Select Flattened to print the document with all of your annotations embedded. Embedded annotations can be viewed but not altered in any PDF reader. If there are [Note annotations](#), the text of those notes will be summarized in extra pages at the end of the document. If you'd like to only print those pages of your document that have been annotated, switch the **Annotated Pages Only** selector to ON. Annotated Pages Only applies to Flattened documents. Choose Original PDF to print the original PDF document without any annotations added to it.



Sample of flattened annotations



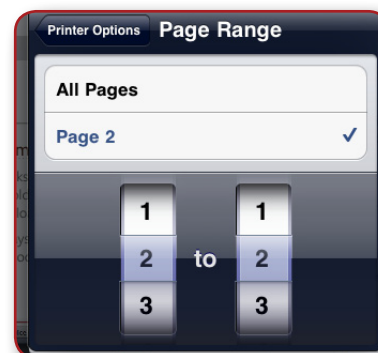
Sample of Note summary page

Once you've selected a document format, the Printer Options dialog box opens. Tap **Select Printer** for a list of AirPrint-enabled printers and choose the printer you'd like to use. To print specific pages, tap **Page Range**. You can also adjust the number of copies to be printed by tapping the + and - buttons above the print button.

If you've chosen to print Annotated Pages Only, the Page Range will only display the number of pages that have been annotated plus the extra pages that contain text Notes. For example, if you've annotated pages 2, 5, and 6 in your 10-page document, and Note annotations have been summarized for you on page 11 (see above), the provided Page Range will be **1 - 4**. To print only page 2 (the first page of the given range), select **1 - 1**; to print page 5 only, choose **2 - 2** on the Page Range selector. To print only the text of the Note annotations, select **4 - 4**.



To quickly print a single page, use the **Print Current Page** toolbar button.



Selecting the page range

When you're ready, tap the **Print** button to start printing. You can now go back to working with your document while your printer gets to work in the background.

## 4: The Document Manager

The Document Manager allows you to locate and organize your documents. To access the Document Manager, tap the Library button in the upper left corner. Once you've opened the Document Manager, tap any document to read it. Or, use a two-finger-tap on any document to preview. To exit the Document Manager, tap the **Done** button at the bottom of the screen. Tap the **?** for in-app help with any item on screen.



The Document Manager

## 4.1: Finding Documents

By default, the Document Manger opens in **Browse** mode with the files and folders in the home directory displayed in the Document Browser area. From here, navigate through your folders by tapping them, or use the [Breadcrumbs](#) on the top of the browser window .

Another way to find documents is to take advantage of the sorting options:



Favorites

Tap **Favorites** to display all documents in the library that have been marked as Favorite. Mark a document as Favorite on the [Document Information](#) screen, which can be accessed in the Document Manager by two-finger tapping any document thumbnail.



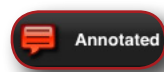
New

**New** displays the documents in the order that they were added to the Library, newest documents first.



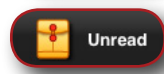
Recents

Use **Recents** to find recently read documents. The documents will be sorted with the most recently read document first.



Annotated

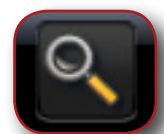
**Annotated** documents displays all documents that have been previously marked up in iAnnotate.



Unread

Tap **Unread** to display all documents in the library that have not yet been opened in iAnnotate.

### 4.1.1: Library Search



Search icon

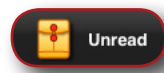
For a more focused search, tap the **Search** icon to open the **Library Search** panel. Here you can enter search keywords in the text box. Documents matching the search terms will be displayed in the Browser area.

Use the selector below the text box to change the scope of the search. Search using the **Full-Text** of documents, or tap **Tags** to search the notes/tags you have applied to documents. **Names** will search only the titles of the documents.



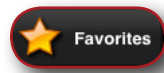
All Files

Narrow the search by switching from **All Files** (the contents of the entire library) to one of the other sort options:



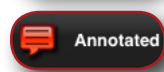
Unread

Tap **Unread** to search all documents in the library that have not yet been opened in iAnnotate.



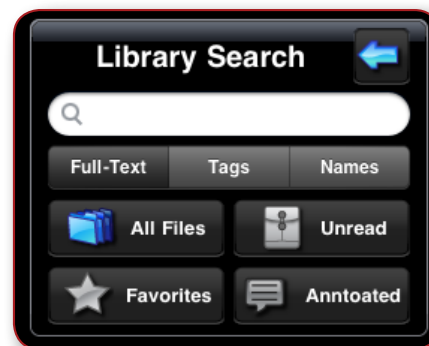
Favorites

Tap **Favorites** to search all documents in the library have been marked as Favorite.



Annotated

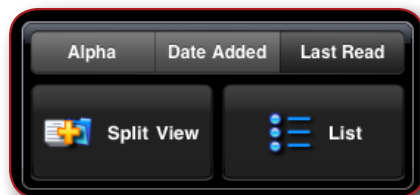
**Annotated** documents searches all documents that have been previously marked up in iAnnotate.



Library Search panel

To return to Browse Mode, tap the blue back arrow on the top right of the Library Search Panel.

## 4.2: Changing the Document Browser View



Sort and View Options

Use the selector to change the order in which documents are displayed. Choose **Alpha** to list by document names, view by **Date Added** (the date the documents were added to the library), or display in the order when documents were **Last Read**.

The **Split View** button will toggle the split view display, which shows the normal document browser on top and a *folder-only* browser on the bottom. This is especially useful if you wish to move files from one folder into another. Simply drag your files from the top area of the Document Browser to the target folder you'd like to use in the bottom area.

Tap the **List** button to switch the documents from a thumbnail display to a list display. This may be preferable when working with many documents or documents with long file names.

### 4.2.1: Organizing Files

It's easy to rearrange and organize your files by using the **Breadcrumb** Display. The Breadcrumb display indicates which folder's contents you are viewing. Tap on any folder icon to view the contents of that folder. You can also move files (including selected files) by dragging them into folder icons in the breadcrumb view.



To the right of the breadcrumb display is the **New Folder** icon, tap it to create a new folder. After you enter a name for the folder, you may drag files into it and move it around like any other folder.

## 4.3: Selecting Documents



Expedite your organizing by using the Selection panel! To select a document, drag it into the Selection box. The selection box displays and controls the currently selected documents. Tap the Selection box to view and modify the current collection of selected documents.

As an alternative to dragging them into the selection box, add or remove files from the selection by tapping the **Selection Mode** button. Exit Selection Mode by tapping the green check mark icon. **Select All** will add all documents currently displayed in the document browser to the selection. Remove all documents in the selection by tapping the **Clear Selection** button.



Exit Selection Mode

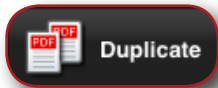
Once files have been selected, drag the contents of the selection box to a folder in order to move them. Or, drag them to one of the action buttons below the **Sort and View** panel.



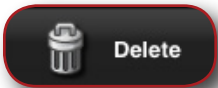
**Tag** will apply tags/notes to the files in the selection.



**Mail** opens an e-mail window with the selected documents attached. For more information about mailing documents, please see section [7: Sharing your Annotated Documents](#).



Drag the selection to **Duplicate** to make copies of the documents. The copies will be located in the same folder as the original.



To delete the files, drag the selection to the **Delete** button. You may also drag folders to this button to delete them.



Use of the Selection panel is not required to perform these actions. You may drag single files directly from the Document Browser to Tag, Mail, Duplicate, and Delete them.

## 5: Reading Documents

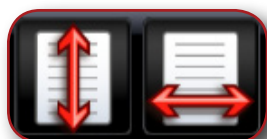
iAnnotate is a powerful, fast, easy-to-use PDF reader. This section will detail the PDF reading features.

### 5.1: The PDF Display

When you open a document in a new tab, iAnnotate presents the document so that the page content takes up the majority of the screen. You can use the standard gestures to navigate the document: drag and flick to scroll, pinch to zoom in and out.

At any time, you can tap on the PDF display to hide the iAnnotate user interface, and read your documents in full-screen mode. Simply tap again when you need access to the interface.

If you prefer, you can turn on the [Overlay Toolbars on PDF](#) setting (under [Display Settings](#) in the Main Menu) to shrink the PDF display so that the toolbars are shown outside of the PDF display and not on top of it. Even when this mode is turned on, you can still tap to hide all interface elements and read in full-screen mode.



*Fit Document to Height*  
*Fit Document to Width*

To automatically fill the display with your document, use the **Fit Document to Height** and **Fit Document to Width** commands. The Fit Document to Height button will update the document scale so that the height of the page matches the height of the display. Fit Document to Width scales the document to match the width of the display.



*Scroll Lock*

Use **Scroll Lock** to keep the document from moving horizontally while you scroll vertically. If you turn on Scroll Lock, you may also want to engage [Elastic Scroll Lock](#) in the [Settings](#) menu. Elastic Scroll Lock allows some horizontal movement when you tap-and-drag; lift your finger and the document automatically reverts back to original position.



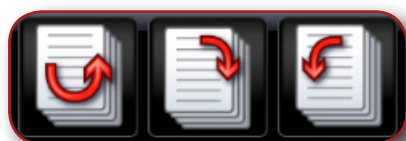
If you'd rather read documents one page at a time, instead of using a continuous scrolling view, turn on Single Page Mode in the [Display Settings](#) menu. See [5.4: Single Page Mode](#) for more details

#### 5.1.1: Modifying the Document

Sometimes PDFs that were created using a scanner have pages with that were scanned in sideways or upside-down. To correct for this, use the **Rotate Page** or **Rotate Document** commands.



It is important to understand that these commands modify the PDF file itself (as opposed to merely rotating the display of it).




*Rotate Document 180 Degrees*  
*Rotate Document Clockwise*  
*Rotate Document Counter-Clockwise*

To rotate the all the pages in a document at once, use the **Rotate Document Clockwise** (90 degrees - a quarter turn), **Rotate Document Counter-clockwise** (90 degrees in a counter-clockwise direction), or **Rotate Document 180 Degrees** toolbar commands.

iAnnotate allows you to rotate single pages with the **Rotate Page Clockwise**, **Rotate Page Counter-clockwise**, and **Rotate Page 180 Degrees** toolbar commands. Rotating a single page requires iAnnotate to re-process your entire document - not just the page being rotated. If you're working with a large document or doing multiple rotations, you may experience some delays. For more information about document processing, please see [11: Understanding PDF Processing](#).



Rotate Page 180 Degrees  
Rotate Page Clockwise  
Rotate Page Counter-Clockwise

 All existing markup annotations in the document will NOT be rotated when any of the Rotate Page or Rotate Document commands are used.

To add blank pages to your document, use the **Add Page Before** and **Add Page After** toolbar commands. Add Page Before will insert a blank page before the current page, Add Page After will insert the page after the current page.



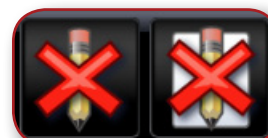
Add Page Before  
Add Page After




To remove any page, use the **Remove Page** command.

Remove Page

If you'd like to delete all the annotations on a particular page, use the **Delete Annotations on Page** toolbar command. To delete all the annotations in the document, use **Delete All Annotations**.



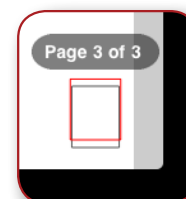
Delete Annotations on Page  
Delete All Annotations

 Delete Annotations on Page and Delete All Annotations will permanently remove your annotations. Use with care!

### 5.1.1: The Page Locator

By default, iAnnotate shows the Page Locator view in the bottom-right corner of the PDF display area. The red border indicates the area of page that is currently being displayed on-screen.

The display of the Page Locator (and the Page Number display above it) can be turned off in the [Settings](#) menu, under **Display**.



Page Locator

### 5.1.2: Select Text



Select Text

iAnnotate allows you to select and copy text from PDF documents onto the iPad clipboard with the **Select Text** command. The copied text can then be pasted in any text view (such as a [Note](#) annotation) or in other applications. You may also use Select Text to look up the dictionary entry for single words. Or, you can explore the meaning of words and phrases with Google and Wikipedia.



To enter Select Text Mode, tap the Select Text toolbar button (looks like a clipboard), or choose Select from the annotation context menu.

When you enter Select Text Mode, the interface is hidden, allowing you to use the full screen area for selecting. To alter the areas of text that have been selected, drag the blue **Handlebars** on either end of the selection. If you'd like to exit Select Text Mode before you've selected anything, tap the End Select Text icon in the upper left-hand corner.



End Select Text

Once you've selected a word or phrase, release your finger and the Select Text [Context Menu](#) will appear. From here, you can Copy your text, or choose to open Google Dictionary, Wikipedia, or Google Search in the integrated web browser and examine the selected text in further detail.

- ⚠ You must have a single word selected in order to use Google Dictionary. Wikipedia and Google Search also work best with single words or short phrases. If you've selected a long passage of text, the only option available to you will be Copy.



Selecting Text

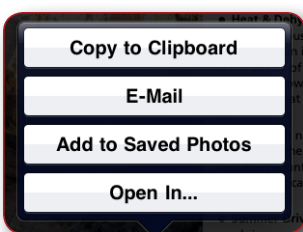
- ⚠ Not all PDF files support text selection, and not all text in all PDF files can be selected. If you are having problems selecting text from your document, please verify that you can select text using a desktop application such as Adobe Reader or Mac Preview.

### 5.1.3: Select Image



Select Image

The **Select Image** command allows you to select and copy an area of your PDF as a PNG image file. To enter Copy Image mode, tap the Copy Image toolbar button. When Select Image mode is active, manipulate the red Dragger on the corners and edges of the selection box to chose the area of the document you'd like to save as an image.



Select Image options

When you're satisfied with the selection, choose from options on the pop-up menu: **Copy to Clipboard** will save your selected image to the iPad Clipboard, which can then be pasted in other applications. **E-mail** will open a new e-mail message with the image as an attachment. **Add to Saved Photos** saves the image to your iPad photo library. Use **Open In...** to view or use the image in another iPad app.



Selecting an image

- ⚠ Once you've saved an image to the Clipboard or your Saved Photos library, you can then attach the image to your document as a [Photo](#) annotation or use it to create a custom [Stamp](#) annotation.

## 5.2: Document Navigation



Navigation Panel toolbar button

One of the most efficient ways to navigate through your document is to use the Navigation Panel. The **Navigation Panel** allows you to quickly move throughout your document and locate content by thumbnails, bookmarks, PDF outline, annotations, or with full-document search. To access the Navigation Panel, tap the Navigation Panel mini icon to the left of the Tab buttons, use the Navigation Panel toolbar button, or select the Navigator option from the [Document Context Menu](#).



Navigation Panel showing Thumbnail view



To navigate with Thumbnails, choose the **Thumbnail** view option from the view selector buttons. You will see a scrollable list of thumbnail images for each page in your document, with the corresponding number for each page overlaid on top. The current page is indicated by a blue outline and blue page number. Tap any thumbnail to move directly to that page in the document, or use the scroller on the left to move to a different part of the document.



Tap **PDF Outline** to navigate with the embedded PDF outline of a document as well as any Aji [Bookmarks](#) that may have been created. Top level outline entries will be displayed initially. If an outline entry is a group node, you can tap the grey arrow button on the right to view the child outline elements. To return to the parent outline element, tap the blue arrow icon at the top of the list. Tap the Aji Bookmarks link above the outline entries to view a list of existing bookmarks.



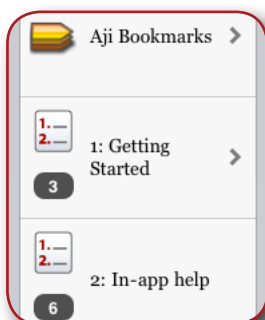
Select the **Annotations** view option to display a list of any [Annotations](#) that you've added to the document. Each annotation will be listed with the annotation type, color, page, and descriptive text.



Tap **Search** to [Search](#) the full-text of the document.



You can use the [Thumbnails](#), [PDF Outlines](#), [Navigate Bookmarks](#), [Navigate Annotations](#), and [Search](#) toolbar button commands to access their corresponding Navigation Panel view options.



Sample PDF Outline



Sample Annotation list



Sample Search result

## 5.2.1: Page Navigation



Go To Page icon

Choose **Go To Page** in order to specify a particular page number to jump to. Note that there is an absolute number of actual pages in a document. Page numbers, as they relate to a table of contents, may not correspond to actual document pages. Example using this guide: actual pages 1 and 2 of this guide (title & table of contents) are pages i and ii; numbered page 1 begins on actual page 3.



Back &amp; Forward

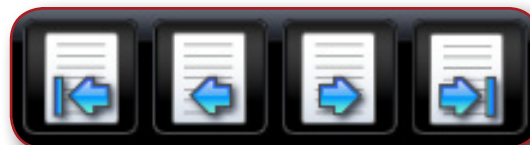
The **Back** and **Forward** buttons enable you to navigate through pages and links in the same way you would with a web browser. For example, if you start at the Table of Contents of a document and tap one of the Contents entries, iAnnotate will navigate to the page associated with that entry. To navigate back to the Table of Contents page without scrolling through all of the previous pages, tap the **Back** button.

If you are zoomed in while reading, the **Move Screen Left** and **Move Screen Right** button commands will shift the document to the right or left, revealing the parts of the document that had zoomed off the document display.

Move Screen Left  
Move Screen RightMove Screen Up  
Move Screen Down

To move up or down one screen height, use the **Move Screen Up** and **Move Screen Down** buttons.

You can use the **Next Page**, **Previous Page**, **First Page**, and **Last Page** buttons or menu commands to navigate by pages.



First Page, Previous Page, Next Page, Last Page icons

## 5.2.2: Using Bookmarks



Bookmark icon

iAnnotate also allows you to create and navigate using bookmarks. Tap the **Add Bookmark** button to create a new bookmark -- bookmarks are automatically given a default name based on the document and page. Tap the name area in the popup editor to change the name.



You can change the color associated with bookmarks, in case you'd like to organize your bookmarks by color.

To go to a bookmark, use the **Aji Bookmarks** button or menu command (it looks like a stack of bookmark icons). This will open the Navigation Panel in PDF Outline view. Tap the Aji Bookmarks entry on the top of the outline list to see all bookmarks in the current document -- tap an entry to navigate to that bookmark.

Use the **Previous Bookmark** and **Next Bookmark** commands to navigate directly to the next or previous Bookmark in your document.

Aji Bookmarks, Previous Bookmark,  
Next Bookmark icons

### 5.2.3: Navigate Outline and Bookmarks



Outline icon

Many PDF documents include information about the document's structure in a table of contents or outline format. iAnnotate processes this information, if it is available, and allows navigation with the [Navigation Panel](#) using the PDF **Outline and Bookmarks** button or [Document Context Menu](#) command.

To jump to an outline location, simply tap the corresponding outline entry. If the outline element is a group node, you can tap the grey arrow button on the right to view the child outline elements. To return to the parent outline element, tap the blue arrow icon at the top of the list. Tap the Aji Bookmarks link above the outline entries to view a list of existing bookmarks.

Use **Previous Outline Entry** and **Next Outline Entry** move between outline entries without opening the Outline Menu and choosing an entry.



Previous &amp; Next Outline Entry

### 5.2.4: Annotation Navigation



Navigate Annotations icon

If you have created annotations on your document, you can use the **Navigate Annotations** button or [Annotation Context Menu](#) command to display a list of any existing annotations in the [Navigation Panel](#). The annotations list indicates the annotation type, color, and page number of the annotation, along with the text that is associated with it.

To navigate to an annotation without picking from the annotations list, use the **Previous Annotation** and **Next Annotation** commands.

### 5.2.5 Document Search



Search icon

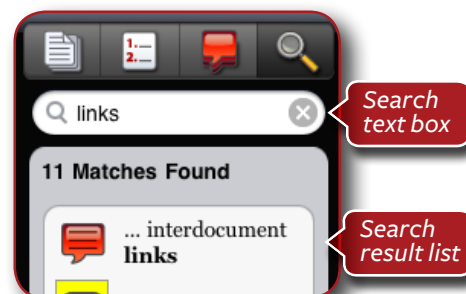
Search, one of the most powerful functions of iAnnotate, gives you the ability to search the full-text of a document. Use the **Search** button to open the search interface in the [Navigation Panel](#). In the search interface, tap inside the text box to enter search terms and hit the Search button on the keyboard popup to start the search. Search results will be displayed below the text box, with the corresponding page number for the result to the right of a short excerpt of context text with the search terms shown in bold. Tap any result to navigate to it on the PDF. Each search result will be indicated on the document with a yellow box.



Search Result

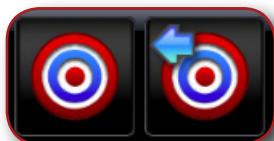


Search includes all document text as well as annotations and text within annotations.



Navigation Panel Search view

## 5.2.6: Set Mark



Set Mark, Return to Mark

To set a temporary mark or “quick bookmark” at your current location, use the **Set Mark** toolbar button. Use the **Return to Mark** toolbar button to return to the last set mark.



The last set mark may be in another open tab. If this is the case, the current document will be switched to display the document with the mark in it.

## 5.2.7 PDF Thumbnails

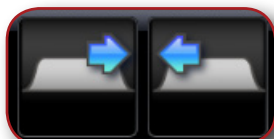


Thumbnails

Use the Thumbnails toolbar command to open the [Navigation Panel](#) and show the PDF thumbnails of each page the document you’re currently reading. A thumbnail is an image that displays a scaled down version of the contents of a particular page. Tap and hold any thumbnail to open the [Thumbnail Context Menu](#).

## 5.3: Tabbed Reading

iAnnotate allows you to open several documents at once using a familiar tabbed interface. When you open a new document, a tab is added in the upper display bar.



Next Tab, Previous Tab

You can switch between tabs by simply tapping the corresponding tab button, or by using the **Next Tab** and **Previous Tab** toolbar commands.

Use the **Duplicate Tab** toolbar command to open another copy of the document you are currently working with in a new tab. This is useful for quickly switching between reading and important places in the document such as figures, references, and footnotes.

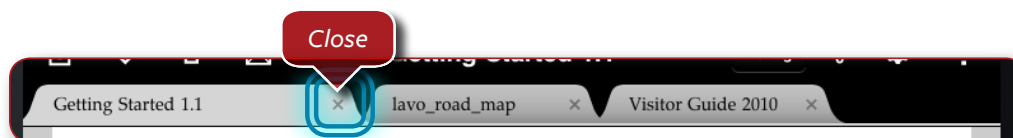


Duplicate Tab

Tap the **X** button on the tab area to close the active tab. Your most recent position and zoom level will be remembered by iAnnotate, even if you close the tab.



Each open document requires additional resources from the device, so opening many tabs may decrease performance. When reading very large or complex documents, it’s recommended to keep the number of open tabs to a minimum.



Tabs

### 5.3.1: The Document Context Menu

The Document Context Menu provides options that enable you to navigate and share your document, access PDF information, close the tab, or delete the document. To open the Document Context Menu, tap-and-hold the tab of the document you are currently working with.

If you're finished working with a document, tap **Close** to remove the document and tab from the PDF display.

Tap **Navigator** to open the [Navigation Panel](#) with navigation actions available for the PDF.

The **Share...** button opens a sub-menu with options for sharing your documents. To [E-mail](#) your PDF, tap the **E-mail** button. **Note Summary...** offers options for sharing the notes summary if your document (E-mail, E-mail with Document, and Copy to Clipboard). Use **Open In...** to open the document in another app that supports the [Open in...](#) feature (such as iBooks). Tap **Copy** to copy your PDF to the clipboard.

**Upload** allows you to transfer the PDF to a remote account, either via Dropbox, WebDAV or Aji PDF Service.

⚠ Note that for WebDAV and Dropbox, if you choose the account from where you got the PDF originally, it will be uploaded into the folder from which it was originally downloaded into iAnnotate. However, if you choose Aji PDF Service or a new account for the PDF, it will be uploaded into the default uploads folder for that account, which for WebDAV and Dropbox accounts is called "iAnnotate PDF" and for Aji PDF Service is configurable in the settings (see [7.7.2: Viewing Uploaded Documents on Your Computer](#)).

Select **Print** to [Print](#) the document. Tap **Info** to access the [Document Information](#) window. Use **Duplicate Tab** to open the current document in another tab. **Delete...** allows you to either delete the entire document or delete all of the annotations in the document.

⚠ If you choose Delete All Annotations, be aware that all annotations and bookmarks will be permanently removed from the document.



Active tab Document Context Menu

Tap-and-hold any inactive tab to bring up a Context Menu without opening that document. Tap **Close** to close the document. Use **Share...** to access sharing options. Select **Info** to edit [Document Information](#). Tap **Delete...** to delete the document or all of the annotations in the document.

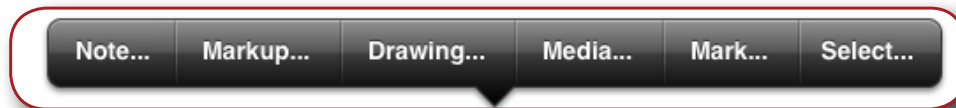


inactive tab Context Menu

### 5.3.2: The Annotation Context Menu

The Annotation Context Menu provides options for annotating your document. To open the Annotation Context Menu, tap the tab and hold any portion of the document you are currently working with.

Select **Note...** to create a [Note](#) or [Typewriter](#) annotation. **Markup...** will allow you to [Highlight](#), [Underline](#), or [Strike Out](#) text. Tap **Drawing...** to make a [Finger](#) or [Line](#) annotation. Tap **Media** to include a [Stamp](#), [Photo](#), or [Sound Clip](#) annotation. Select **Mark** to add a [Bookmark](#), to set a [Mark](#), or to return to a Mark. The **Select...** option will enable the [Select Text](#) or [Select Image](#) mode.

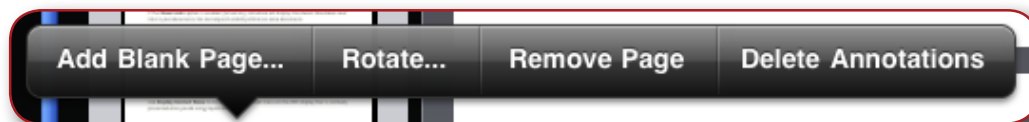


Annotation Context Menu

### 5.3.3: The Thumbnail Context Menu

The Thumbnail Context Menu provides options for altering the structure of your document. When using the [Navigation Panel](#) in Thumbnail view, tap and hold on any thumbnail to open up the Thumbnail Context Menu.

Select **Add Blank Page...** to use the [Add Page Before/Add Page After](#) toolbar commands on the current page. Tap **Rotate...** to see options for [rotating](#) the current page or document. **Remove Page** will delete the current page. **Delete Annotations** will permanently remove all annotations from the current page.




Thumbnail Context Menu

### 5.3.4: Document Information

Tap **Info** on the [Document Context Menu](#) to access and edit the information associated with your PDF. To change the document title, tap inside the title text box. Use the text area below the title box to enter notes or tags that describe your document. Once you enter tags, you may use them while searching for documents in the [Document Manager](#) with the Tags selector in [Library Search](#). Use the star icon at the bottom to mark the document as a [Favorite](#). To change the thumbnail image displayed for the document in the Document Manager, first navigate to the page you'd like to use, then open the Document Information window and tap the thumbnail image. The thumbnail image will be updated to display the current page.

Tap the **i** button to see details about your document, such as: title, number of pages, date added, last time viewed, and last time annotated.

The **Gear** button to the right of the Favorite icon will open a menu with options for [Sharing your document 113](#). From here you may also access advanced settings for the document. One of the advanced options is to re-process the PDF; for more information about PDF processing, see section [11: Understanding PDF Processing](#). If iAnnotate experienced problems processing the PDF, there will be a **Report** button that allows you to e-mail error logs to Aji support, along with the problematic PDF.

 **Please take caution when working with advanced settings – they should only be used as directed by the Aji support team.** If you're experiencing problems with a PDF, please visit the [Aji Support Site](#).




Document Information window

If you'd like to completely remove the document and any annotations it may have from iAnnotate, tap the **Delete** button.

## 5.4: Single Page Mode

To read documents one page at a time, instead of using the continuous scrolling view, turn on Single Page Mode in the [Display Settings](#) menu. In single-page mode, iAnnotate will display only one page at a time, and then you can swipe, tap, or slide the pages to change.

The page-changing behavior in Single-Page Mode depends on how you are reading. If you zoom out so that you can see the full page-width at once and no scrolling is possible -- for example, using [fit-to-width](#)-- then you can use swipe gestures, to the left and to the right, to change between pages.

 You can also use swipes if you have [Scroll Lock](#) turned on.

However, if you are zoomed in enough to allow horizontal scrolling, then swipes won't work, since they are used to control horizontal scrolling. In this case, you can drag the pages off the edge in order to navigate.

For example, to move to the next page, scroll all the way to the right edge of the page, then drag the page even further to the left (so the background shows). After you do this, iAnnotate will change to the next page.

In either case, you may prefer to use taps on the right or left edges to change pages. If the **Tap-to-Advance** setting is On (the default), you can tap to move vertically down the page; then, once you have hit the bottom of the page, iAnnotate will proceed to the next page on the next tap (and likewise, going backwards). To always change pages with taps, turn on the **Tap Advances Full Page** setting in the Reading options.

Finally, another option is to use the [Next Page / Previous Page](#) buttons in your toolbars to change pages. For use with fullscreen reading, you may wish to try the **Show Toolbars in Fullscreen Mode** option under Display settings.



## 6: Annotation

The core functionality of iAnnotate is, of course, the ability to annotate your documents. iAnnotate provides an easy-to-use and efficient interface for working with PDF standard annotations, allowing you to easily make notes and mark up your documents, as well as share them with others.

### 6.1: Creating new Annotations

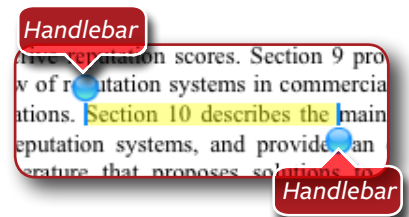


Highlighter  
in Annotation Mode

When creating annotations, iAnnotate will enter **Annotation Mode**. This is indicated by an icon in the upper-left corner of the screen. The icon serves as a reminder of the kind of annotation you are in the process of creating, and also allows you to cancel the annotation -- simply tap the icon to end Annotation Mode.

For [Drawing annotations](#), [Note annotations](#), [Bookmarks](#) and [Stamp annotations](#), tap on the document where you'd like your annotation to appear. This will *end* Annotation Mode, create your new annotation, and opens the popup [Annotation Editor](#) which allows you to modify the text or color of the annotation, if desired.

For [Markup annotations](#), Annotation Mode remains in effect until you end it. So, for example, if you wish to create a highlight, first tap the Highlight button. Then, drag your finger over the areas of text that you'd like to highlight; this means you can include multiple non-contiguous areas as part of the annotation. To alter the areas of text that have been highlighted, drag the blue **Handlebars** on either end. When all desired areas are highlighted, tap the End Annotation Mode icon to finish and create your annotation.

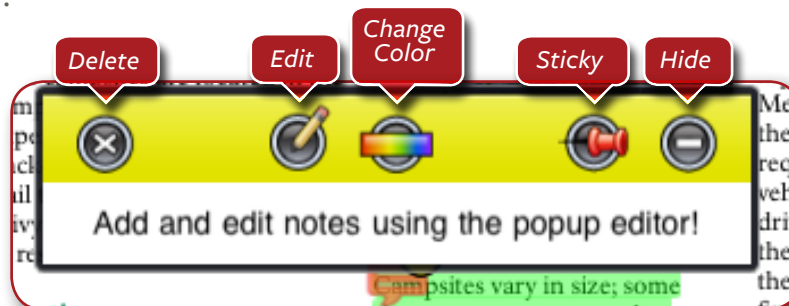


⚠️ Bookmark, Note, and Drawing annotations can be repositioned by simply dragging them: hold your finger on the annotation and then drag it to the new location.

### 6.2: The Annotation Editor

The popup **Annotation Editor** allows you to modify the text contents and/or color of your annotations. The editor displays directly on the PDF view, allowing you to work with your annotations without having to leave the main PDF display.

If the annotation editor is not already visible, simply tap on any existing annotation to display the annotation editor.



Popup Annotation Editor

The right most button on the toolbar is the **Hide** or **Done** button -- it looks like a minus sign. You can use this at any time to hide the annotation popup editor.

Use the **X** button on the left side of the toolbar to delete the annotation. You will be asked to confirm before the annotation is permanently deleted.

The middle two buttons allow you to edit the annotation. The **Edit** button (looks like a pencil) allows you to edit the text contents of the annotation (if applicable). Note that markup annotations (such as highlight and underline) allow you the option of adding a text comment to the annotation, if desired.

The **Change Color** button brings up the [Color Chooser](#), allowing you to change the color of the annotation you're working with.

The pushpin button can be used to control whether or not the popup view is **Sticky** -- see the next section for more details about managing popup view behavior.



For [Stamp annotations](#) and [Typewriter](#) annotations, there will be a **Transform** button on the toolbar, which allows you to move, rotate or resize the stamp image or text.



The **Font Chooser** button appears for Typewriter annotations. The Font Chooser includes options for editing the font size, color, family, style and alignment.



If you have a [Photo](#) or [Sound Clip](#) annotation, you have the option of sharing it with the **Share** button. Choose E-mail to send the annotation as an attachment in an e-mail. Use Open In... to work with the annotation in another iPad application.

## 6.3: Managing popup behavior

---

By default, iAnnotate presents at most one annotation editor at a time. When Auto-Popup mode is turned on, iAnnotate automatically displays the editor for the annotation that is nearest the center of the screen. Other editors are hidden if a new annotation is closer. This behavior allows you to automatically see the contents of text annotations without having to perform any action to display them.

If you wish to see the editor for a different annotation than the one selected for auto-popup, simply tap the annotation. This will hide the current auto-popped annotation editor and display the one for the tapped annotation. You can also tap the Hide button on the annotation editor to prevent it from auto-popping.

This Auto-Popup behavior is on by default, but can be turned off in the Settings Menu, under [Annotation Settings](#). If Auto-Popup is disabled, then the annotation editor will only be displayed when an annotation is tapped.



In addition to normal popup behavior, iAnnotate also includes the ability to make selected annotation editors **Sticky**, using the pushpin icon on the toolbar. When the pin is in, the annotation editor is Sticky -- this means it will never be hidden automatically. You can use this to ensure that the note is always visible whenever the annotation is visible.



You can have multiple annotation editors Sticky at the same time. Tap the pushpin again, or use the Hide button, to make an annotation non-sticky.

## 6.4: Working with Color Annotations and the Color Chooser



Note & Note with Color icon

The annotation toolbar commands come in two types: the basic version simply adds the annotation with the default color, for example yellow for Note annotations.

The second version allows you to associate a particular color with your toolbar command: these are labelled with a rainbow swatch in the command library.

These commands are useful if you wish to organize your annotations by color. Using this, you can set up, for example: one button for yellow highlighting; one for red highlighting; one for green highlighting; and one for pink highlighting. Then, when reading your document, choosing between your highlight colors is a matter of a simple tap on a toolbar button.



Sample Highlighter buttons with specific colors

When you choose one of these commands and add it to your toolbar, iAnnotate will display the Color Chooser, allowing you to select the default color for your button command. iAnnotate uses a standard HSB color map, similar to the one used in Mac OS. Tap or drag over the color map to adjust the hue of your color. RGB and hex values for your color are displayed in the upper area of the Color Chooser. These are editable, so you can also specify RGB or hex codes to choose your preferred color.

The Color Chooser supports up to 16 saved custom colors, displayed at the bottom of the chooser. If you wish use one of these colors, simply tap a custom color to select it.

To set up a new custom color, first pick your color using the normal methods as described above. Then, drag the swatch in the upper-right corner down into the custom colors area, over the cell that you'd like to adjust. The cell will update, and now your custom color will be remembered for future use.

When working with [Drawing annotations](#), the Color Chooser will have slider controls for Pen Transparency and Pen Thickness in addition to the color options.

While you're using your toolbars, you can tap-and-hold the button to change the default color for your command. This allows you to adjust the toolbar button colors without having to go back to the toolbar editor.



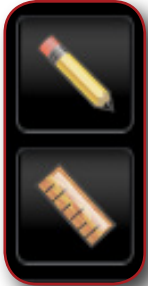
You can always change the color of any annotation you make after you've created it, using the [annotation popup editor](#).



## 6.5: Annotation Types

iAnnotate includes several different standard annotation types for marking up documents.

### 6.5.1: Drawing Annotations

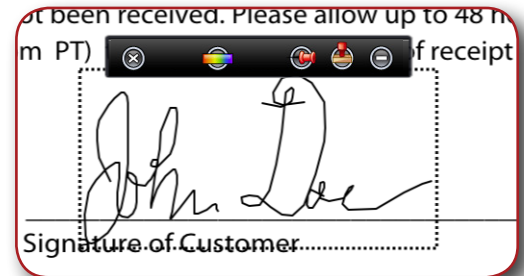


Finger & Line  
annotation icons

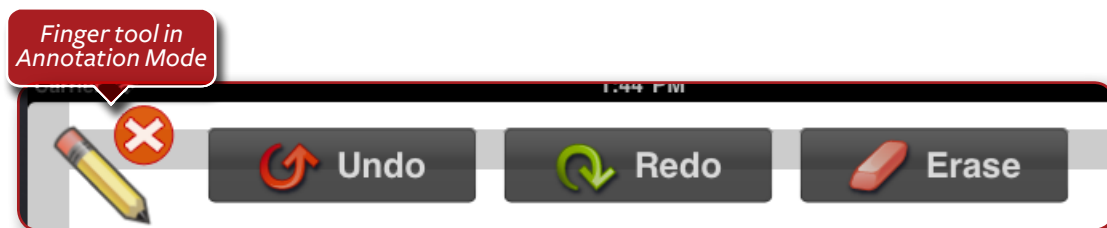
Drawing annotations allow you to use your finger to draw freehand or straight-line annotations, which are overlaid upon the document content. Create a freehand drawing with the **Finger** annotation tool. The **Straight-Line** annotation tool will only make straight lines. Start your line by tapping the spot on the document where you would like the line to begin, drag the line to the spot where you'd like it to end and release to complete the line.

Tap the Color Chooser button on the Annotation Popup Editor to adjust the color of your drawing. Use the Pen Transparency slider in the Color Chooser to control the translucency of your annotations. The Pen Thickness slider allows you to adjust the thickness of your line or drawing. Edit the text contents of the annotation with the Edit button.

It is possible to edit your Finger and Straight-Line annotations while in Annotation Mode. Options for editing appear as buttons at the top of the display. To delete a part of your drawing, tap the **Erase** button. Tap a section of your Finger annotation or a line segment of a Straight-Line annotation to remove it. If you use Erase with the Straight-Line Tool, the entire line segment you tap will be deleted. To change any drawing or erasing you've done, tap **Undo** and **Redo** buttons.



Sample Finger annotation



Edit buttons

Want to reuse a Drawing or Line annotation? Turn your annotation into a [custom Stamp](#). To do this, tap the **Stamp** button on the Annotation Popup Editor. Then, name your stamp and tap the arrow button to add it to the Stamp Library. To cancel this process, tap anywhere outside of the Enter Stamp Name window. See [6.5.4: Stamp Annotations](#) for more information on Stamp Annotations.



The Stamp button

### 6.5.2: Markup Annotations



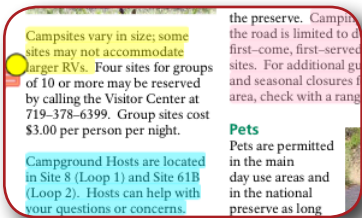
Highlight, Underline, Strikeout annotation icons

Markup annotations include **Highlight**, **Underline**, and **Strikeout** annotations. These annotations track the text in your document.

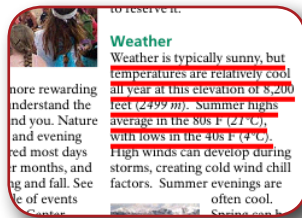
When creating markup annotations, drag your finger over the text which you'd like include. You can include multiple non-contiguous chunks of text in your annotation. Use two fingers to scroll through your document without leaving the annotation mode.



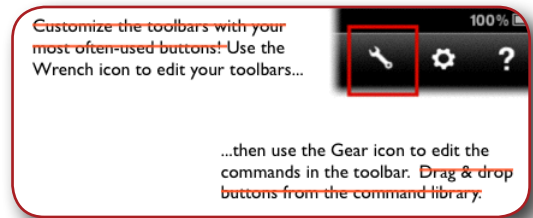
You can optionally include a text comment with your markup annotation and adjust the color using the popup annotation editor.



Sample Highlight annotation



Sample Underline annotation



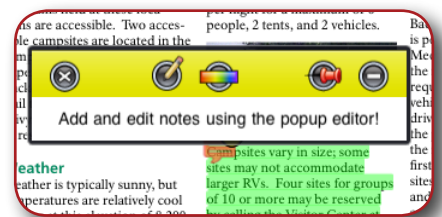
Sample Strikeout annotation

### 6.5.3: Note Annotations



Note annotation icon

**Note** annotations allow you to associate a text note with a specific location in your document. Enter the text in the annotation editor -- you can scroll inside the annotation editor if you have a lot of text in your annotation. Note annotations also have a color associated with them, in case you wish to color-code your notes.



Sample Note annotation

### 6.5.4: Photo Annotations



Photo annotation icon

Use the **Photo Annotation** toolbar command to attach an image or photo annotation to the document. You can select an image from your iPad Photo Library, use the Camera to take a picture (iPad2 or later), or use an image that is on the iPad Clipboard (to copy images from a PDF to the clipboard see [5.1.3: Image Copy](#)).



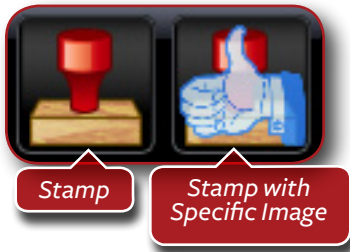
Photo attachment icon

Once you've selected an image to attach, the Photo annotation will be indicated on the document with the photo attachment icon. Tap the icon to open the [Popup Editor](#) for the annotation. From here you will see a scaled-down version of your image - to view a fullscreen version, tap the enlarge image button.



Photo attachment popup editor

## 6.5.5: Stamp Annotations



**Stamp** annotations allow you to overlay an image on your document. To add a stamp annotation, first tap the Stamp icon to enter annotation mode. Once in annotation mode, simply tap the area on your document where you want to locate the stamp. Unless you have previously picked a stamp with a specific image, the Stamp Library will open after you tap – scroll through the stamp options and tap to select. Search the Stamp Library by typing in the search box. To leave Stamp annotation mode, hit the cancel button in the upper left-hand corner.

To transform stamps, tap the Transform button on the Annotation Popup Editor. Now your stamp will be in transformation mode (indicated by a flashing blue outline). Tap and drag to reposition the stamp. Resize the stamp by using pinch gestures inside the box. Rotate it by using 2 fingers and twisting.

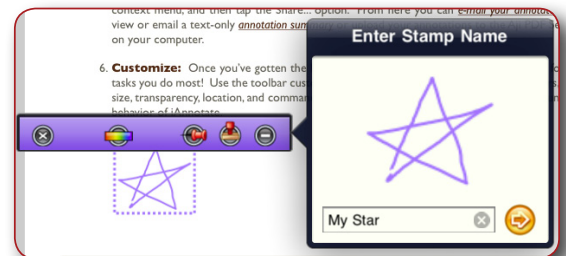


Sample Stamp annotation

⚠ You can't resize and rotate at the same time; you must tap the Transform button again to switch modes. When you're finished, tap inside the box to exit transformation mode.

You may also add a text annotation to any stamp by tapping the Edit button.

Customize your Stamp Library by importing images from your iPad Photo Library. To browse your Photo Library, tap the + button at the top right of the Stamp Library window. Select the image you want, and tap the arrow button to finish. Your new image stamp will be added to the Stamp Library.



Creating a custom stamp from a Drawing annotation



Stamp Library

Another way to create a custom stamp is to use a [Drawing or Line annotation](#) you've previously created. Find the annotation you'd like to use and tap the Stamp button on the Annotation Popup Editor. Then name your stamp and tap the arrow button to add it to the Stamp Library. To cancel this process, tap outside of the Enter Stamp Name window.

Once a custom stamp is added to the Stamp Library, you may select and use it like any of the other stamps.

⚠ Tap and hold any stamp in the library to permanently remove it.

### 6.5.6: Sound Clip Annotation



Sound Clip annotation icon

Use the **Sound Clip** toolbar command to record a short audio or sound recording and attach it as an annotation to the document. To begin, tap the Sound Clip annotation button to enter into annotation mode, and then tap the area on your document where you want to attach the annotation.

Once you tap, the recording interface will appear at the top of the display and you will hear a tone signaling the start of recording. Now you may use your iPad microphone to record a short sound clip. To end the recording, tap the **Stop** button. To restart the recording, tap the **Restart** button.



Sound Clip recording interface

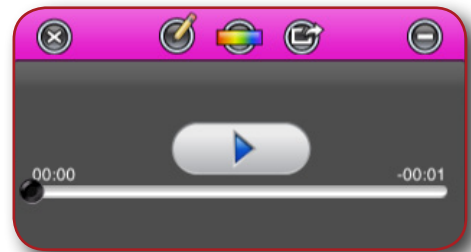


The duration of the recording will be limited to one minute due to file size considerations.



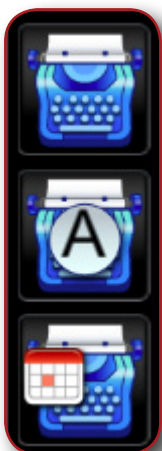
Photo attachment icon

When you've finished a recording, the new sound clip will be indicated on the document with the sound clip attachment icon. Tap this icon to open the pop-up editor for the annotation. Tap the play button to listen to the recording, and use the scrubber to move to a specific spot. To pause, hit the Pause button. Tap Restart to rewind to the beginning of the clip.



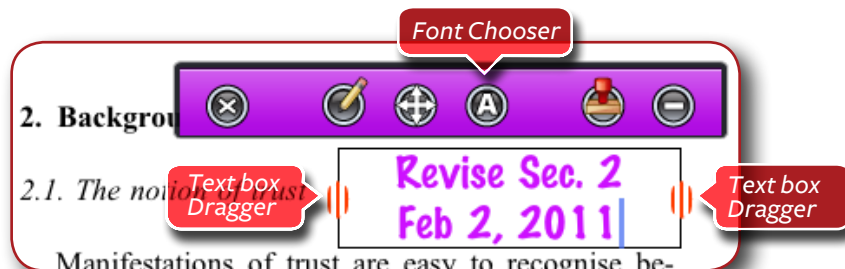
Sound Clip recording pop-up editor

### 6.5.7 Typewriter Annotations



Typewriter  
Typewriter w/Font  
Typewriter w/Date

To add a free-text annotation directly onto a page of your PDF, use the **Typewriter** command button. Tap the document where you'd like your annotation to appear, and use the keyboard to type inside the text box. To change the dimensions of the text box, tap-and-drag the red **Draggers**. If you'd like to adjust the appearance of your text, tap the Font Chooser button on the Annotation Popup Editor menu bar.

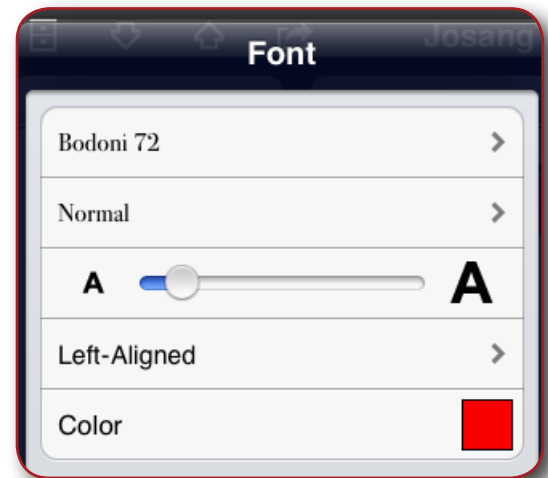


Sample Typewriter with Date annotation


The Font Chooser has options for changing the appearance of your text.

Use the top two buttons on the Font Chooser to change the font family (Helvetica, Arial, etc.) and font style (bold, italic). Adjust the font size by using the Font Size slider in the middle. To change the alignment of your text, tap the button below the Font Size slider. Tap the Color button on the bottom to open the [Color Chooser](#) and change the color and transparency of your text.

Customize the Typewriter command by using the **Typewriter with Font** and **Typewriter with Date** buttons. Drag these buttons onto your toolbar from the [Toolbar Editor](#). When you chose Typewriter with Font, you will be prompted to set the font family, style, size, alignment and color with the Font Chooser. Typewriter with Date works in the same way, except that any annotation you make with it will have today's date added to the text. To change the font settings of either of these buttons without switching to the Toolbar Editor, tap-and-hold the toolbar button.



*The Font Chooser*

 Typewriter annotations differ from [Note](#) annotations - the Typewriter text is always displayed on the PDF while text entered into a Note is contained within the [Popup Editor](#) box, and is not visible when the Popup Editor box is minimized.



## 7: Sharing Your Annotated Documents

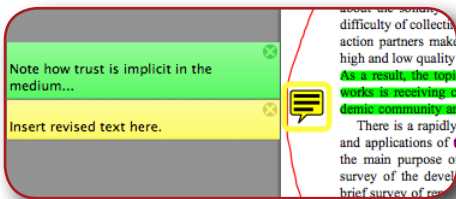
### 7.1: Mailing Annotated Documents



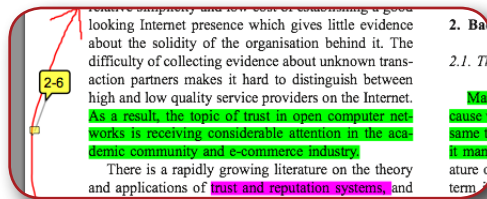
Share icon

If you would like to e-mail an annotated document, simply tap the **Share** button on the left-hand top toolbar. Tapping the Share icon causes a popup menu to appear with five options: Mail Document, [Mail Summary](#), [Mail with Summary](#), [Print](#), and [Open in...](#) (You may also e-mail documents by tapping Share... in the [Document Context Menu](#).) Select the desired Mail option, and the Sharing Options dialog box will open.

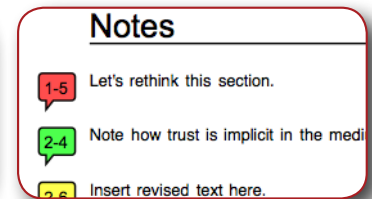
There are three format options for your PDF available: **Annotated**, **Flattened**, and **Original PDF**. To include editable annotations in your document that can be viewed and edited in compatible PDF readers such as Adobe Acrobat and Preview, tap Annotated. Select Flattened to print the document with all of your annotations embedded. Embedded annotations can be viewed but not altered in any PDF reader. If there are [Note annotations](#), the text of those notes will be summarized in extra pages at the end of the document. If you'd like to only print those pages of your document that have been annotated, switch the **Annotated Pages Only** selector to ON. Annotated Pages Only applies to Annotated and Flattened documents, but not Original PDF. Choose Original PDF to print the original PDF document without any annotations added to it.



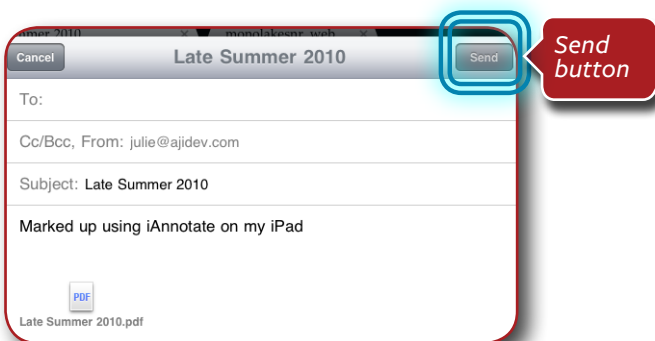
Sample of editable annotations



Sample of flattened annotations



Sample of Note summary page



E-mail composition window

After you decide on the Sharing options, the e-mail composition window opens. Here you may compose and send your e-mail just like you would in Mail without leaving iAnnotate. In addition to attaching the document, iAnnotate auto-fills the e-mail subject line with the title of the document, as well as your e-mail address in: Cc/Bcc/From. Feel free to replace the auto-filled text with whatever you wish. When you are ready to send the e-mail, simply tap the Send button; the window will close while the e-mail is sent and you can resume working with iAnnotate.

In addition to the **Share** top toolbar button, you may also use the **E-mail Current Page** and **Mail Document** toolbar buttons to access the Sharing Options and e-mail composition window.

E-mail Current Page,  
Mail Document

## 7.2: Mail Summary



E-mail Annotation  
Summary

**Mail Summary** allows you to e-mail a text summary of all your annotations without mailing the PDF itself. Access this function by tapping the **Share** icon and selecting the Mail Summary option or by using the **E-mail Annotation Summary** toolbar button. Once selected, an e-mail composition window will open, and the e-mail body will contain a text list summarizing all the annotations you have made so far. They'll be sorted in the order that they appear in the document, with the page number at the beginning of each annotation, followed by the type of annotation (Note, Highlight, Underline, etc.), the color of the annotation, and finally the content.



E-mail PDF  
& Summary

**Mail with Summary** allows you to e-mail a text summary of your annotations, along with the PDF document itself. Tap the Share icon and select the Mail with Summary option or use the **E-mail PDF and Summary** toolbar button. The e-mail popup menu will open the mail window. The list summary of your annotations will be in the e-mail body and the PDF document will be attached.

```
Page 11, Highlight (Custom Color: #ff44ad):
Content: "resides.Then,"

Page 11, Note (Yellow):
Remove space

Page 12, Note (Yellow):
Fix alignment

Page 14, Highlight (Custom Color: #ff44ad):
Content: "3.6.4:Troubleshooting"
```

Sample Annotation Summary

## 7.3: Copy to Clipboard

iAnnotate allows you to select and copy text and images from PDF documents onto the iPad clipboard. From the Context Menu, select **Share...** and then **Copy** to copy your PDF Document to the clipboard.

You may also copy blocks of text to the clipboard with the [Select Text](#) tool. The copied text can then be pasted in any text view or in other applications.

To copy an image from the document to the clipboard, use the [Select Image](#) toolbar command. Images copied to the clipboard can then be attached to a PDF by creating a [Photo annotation](#).

## 7.4: Uploading Using iTunes USB File Transfer

See [3.2: Using iTunes USB file transfer](#) for information about uploading your documents to iTunes.

## 7.5: Sending Documents to Other Applications

If you'd like to open your document in another application, see [3.4: Working with other applications](#).

## 7.6: Printing Documents

To print your document, please see [3.8: Printing Documents](#).

## 7.7: Uploading Using the Aji PDF Service

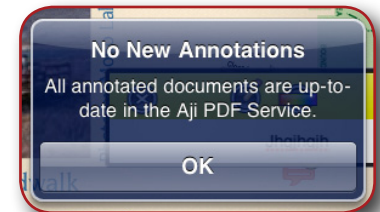
### 7.7.1: Uploading Documents



Upload icon

To upload a document (to Dropbox, WebDAV, or the Aji PDF Service), tap **Share...** followed by **Upload...** on the [Document Context Menu](#). If you have multiple servers set up, you can choose which account you'd like to upload the file to.

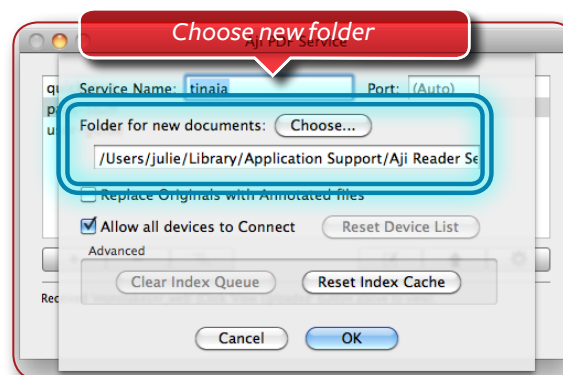
You can also upload back all of your annotations from downloaded documents using the **Upload** icon on the top toolbar. In the Upload popup menu, select the account which you wish to upload to, or select Aji PDF Service. Once you do this, messages will appear at the top of the screen, listing the titles of each newly annotated document. iAnnotate will upload any PDF in your library with new annotations, whether it is currently open in the app or not.



### 7.7.2: Viewing Uploaded Documents on Your Computer

Once you've uploaded the documents in iAnnotate, you can switch to your computer in order to view them. Click the Browse Uploaded... button to open the document directly from Aji PDF Service. If the original document was uploaded from your computer into iAnnotate using Aji PDF Service, you can find the annotated version in the folder that housed the original with "-Annotated" added to the end of the file name.

By default, Aji PDF Service will save documents downloaded from the internet in the Uploads folder on your computer. Clicking the Browse Uploads Folder button will open a path to that folder for you. Change the destination of the Uploads folder by clicking on Settings in Aji PDF Service and choosing a new folder in the settings window.



Changing the Folder

## 8: Customizing the iAnnotate Interface

One of the most powerful features of iAnnotate is the ability to customize the user interface, and tailor it to exactly the kinds of actions you perform most. Primarily, this is done by creating and managing Toolbars.

### 8.1: Managing Toolbars



Wrench icon

Tap the wrench icon in the upper-right to enter Toolbar Editing Mode. In this mode, additional editing controls are added to the toolbars, and you have the ability to create new toolbars.

To add a new toolbar, tap the Add Toolbar button in the bottom-right corner of the screen. You can choose from a selection of pre-defined toolbars, or you can choose to create a new empty toolbar for customization. Even if you choose a pre-defined toolbar, you can later edit the particular commands.



Add Toolbar

When editing toolbars, each toolbar will display two **grabbers**, one on either end of the command buttons. Use these grabbers to pick up and drag the toolbars to another location on the screen. Toolbars can be docked on any of the four edges of the display. Note that multiple toolbars can be docked on a given edge of the screen.



Toolbar grabbers

Use the Edit Toolbar (gear-shaped) button on one end of the toolbar to enter the editing mode. See [Editing Toolbars](#) for more information about editing a toolbar.

Use the Remove Toolbar button (X-shaped) on the other end of the toolbar to remove it from display. At this time, removed toolbars are permanently deleted -- although you can, of course, re-create the toolbar later using the toolbar editor.



By default, the toolbars are displayed on top of the PDF content area. You can use the Overlay Toolbars on PDF setting (under [Display Settings](#)) to adjust the PDF view so that the toolbars remain completely outside of the reading area. This reduces the size of the reading area, but also ensures that none of the reading area is blocked by the toolbars.



Master icon

The **Master Button** allows one-tap access to all toolbar buttons, providing an easy shortcut to infrequently used buttons without taking up space with extra toolbars.

## 8.2: Editing Toolbars

The toolbar editor allows you to configure the command buttons on your toolbar, and also the size and transparency of your toolbar.

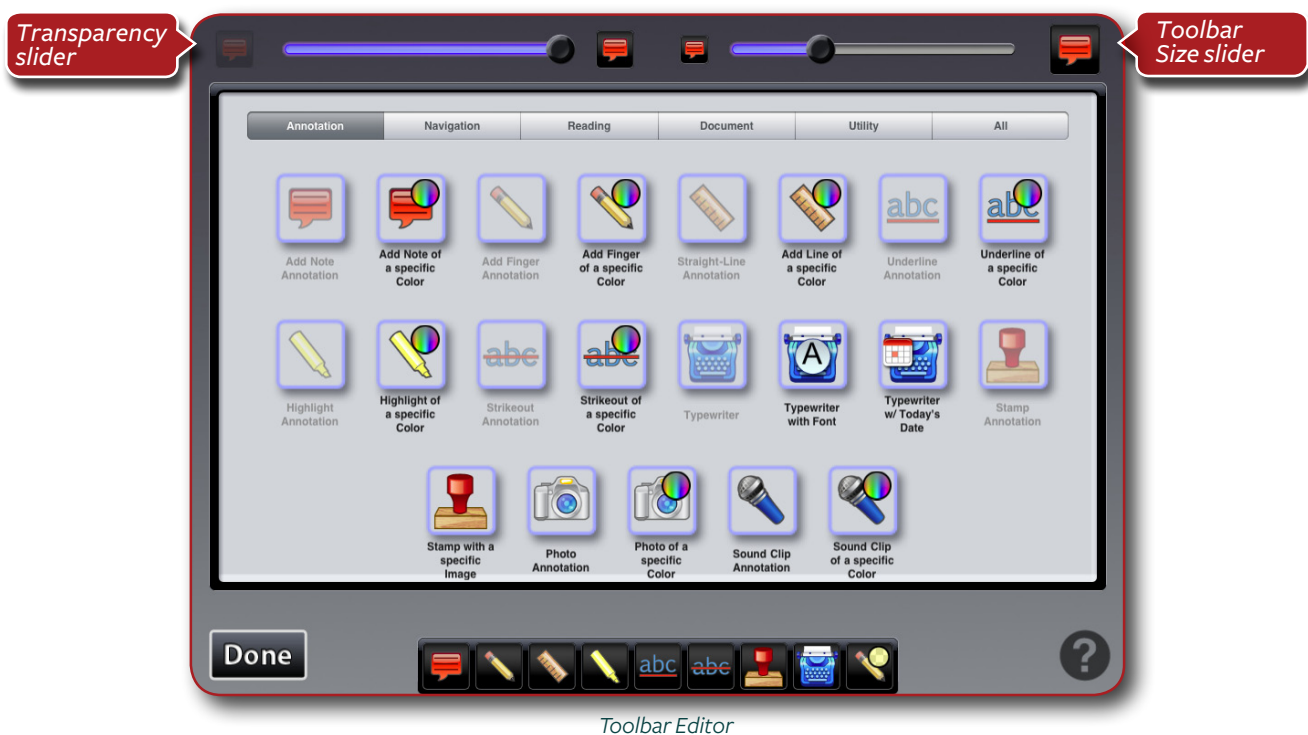
- ! Use the Transparency slider to control the transparency of toolbars, allowing you to read the content behind the toolbars.
- ! The button size will be limited if there are many buttons in your toolbar.

The central area of the toolbar editor contains the library of commands that are available for your toolbars. Toolbar commands are grouped according to their functions: **Annotation** commands include options for adding [annotations](#) to a document. **Navigation** commands offer ways to help you move around efficiently within a document. **Reading** commands like [Add Bookmark](#), [Set Mark](#), and [Next/Previous Tab](#) are useful while reading a PDF. **Document** commands allow you to alter the document itself - such as [Add Page Before/Add Page After](#), [Remove Page](#), and [Rotate Page Clockwise](#). Commands grouped under **Utilities** offer other options such as [Print](#), [Present](#), and [Edit Toolbars](#). To see all the commands in the library at once, select the **All** option.

To add a command to your toolbar, simply drag the command icon from the command library into your toolbar at the bottom of the screen. The existing buttons will adjust their location based on where you place the new command.

- ! Some commands can only be added once to a toolbar, but many make sense to be added multiple times. If a command is already in your toolbar and cannot be added again, it will be grayed out in the command library.

You can also reorder the command buttons in your toolbar by dragging them into their new position, and remove commands by simply dragging them outside of the toolbar.



## 9: Settings

iAnnotate includes several settings for customizing app behavior and interface. These settings are accessible from Settings in the Main Menu. For in-app help, tap the ? icon next to any setting.

### 9.1: Reading Settings

#### Brightness

Use the Brightness slider to control the brightness of the application display. This is especially useful for night reading.

#### Elastic Scroll Lock

Turn on this setting to use a soft lock when [Scroll Lock](#) is turned on. This allows you to tap-and-drag the document over horizontally (to look at something in the margin, for example), but it will always return to the locked position when let go.

#### Single-Page Mode

When Single-Page Mode is switched *on*, iAnnotate will display only one page at a time, instead of a continuous vertical scrolling view.

In order to change pages, you can:

- a) use the [Next Page / Previous Page](#) toolbar buttons,
- b) use left / right swipe gestures, if the page is zoomed-out enough, or
- c) drag the page off edge of the screen, if the page is zoomed-in enough.

#### Tap-to-Advance

When Tap-to-Advance is on, tap the right edge of the display to advance one screenful; tap the left edge to go back one screenful. In [Single Page Mode](#), a tap will move the document forward and back full pages. Turn off to disable.

#### Tap-Advances-Full-Page

Turning Tap-Advances-Full-Page on while using Tap-to-Advance enables taps to move the document forward and backward a full page, instead of a screenful. When off, Tap-to-Advance works as normal.

#### Slide-to-Advance

This setting is only relevant in [Single Page Mode](#). When set to *on*, slide the page over the edge of the screen, to the right or left to advance the page as appropriate. Note that the page must be zoomed in far enough to allow horizontal scrolling. The default for this setting is *on*, to disable this behavior switch it to *off*. See Swipe-to-Advance below for changing pages in Single-Page Mode when the page is zoomed out.

#### Swipe-to-Advance

This setting is only relevant in [Single Page Mode](#). When *on* and the page is zoomed out far enough, swipe your finger to the left or right to change the page as appropriate. The default is *on*, so turn this setting *off* to disable the behavior.



The Settings menu

## 9.2: Display Settings

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### Show Links

If this option is enabled (turned on), iAnnotate will display translucent blue boxes over links in your documents; this can help with visibility of links on some documents.

### Show Page Number

Turn this setting on and iAnnotate will display the number of the page you are currently viewing, as well as how many pages there are in total, in the bottom right-hand corner.

### Show Page Locator

When switched on, Show Page Locator will show the [Page Locator](#) in the lower right-hand corner of the screen to help with orientation. It is a small red box representing the current page dimensions. With this, you can tell how much of the page, and which part of it, you are currently viewing.

### Overlay Toolbars on PDF

Use this setting to control whether or not the PDF reading view is re-sized to fit within the area inside your toolbars, or if it is fit to the whole screen with the toolbars displayed on top of the reading area.

### Show Toolbars in Full-Screen Mode

Full-screen mode removes the menus and tab bars at the top of the screen so that you can see more of your document while reading. The Show Toolbars in Full-Screen Mode option controls whether or not the toolbars are visible in full-screen mode.

### Display Context Menu

Use Display Context Menu to disable the context HUD menu on the PDF display that is normally presented when you do a long-tap on the display.

## 9.4: Notification Settings

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### Show Informational Alerts

iAnnotate occasionally displays status alerts in the upper-right corner of the screen when various actions are completed, such as downloading new documents or connecting to the Aji PDF Service. You can turn off the Show Informational Alerts setting if you wish to suppress informational messages; warning and error messages will still be displayed.

### Show Tips

iAnnotate uses Tips to help guide you through the process of learning the interface and features of iAnnotate. You can turn the Show Tips setting off to disable the display of tips.



Anytime you tap OK for a tip, that tip will no longer be displayed.

If you wish to reset the tips so that all tips are displayed again, turn this option off and then on again.

### Show Processing Status

iAnnotate must process documents in your library before many operations (like Search and Highlight) are possible. iAnnotate takes care of this automatically, but if you'd like to monitor the status of a document while it's processing, turn Show Processing Status on. If turned on, a spinner will be displayed in the top right corner of the screen when a document is being processed. Tapping on the spinner will reveal information about what page is currently being processed.

## 9.5: Annotation Settings

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### Hide Interface when Annotating

By default, the Hide Interface when Annotating setting is on. In this case, iAnnotate goes into full-screen mode whenever you are creating a new annotation. Turn this off to leave the interface visible when making new annotations.

### Auto-Popup Annotations

This setting is on by default; use this to disable this option. See [Managing popup behavior](#) for more information about auto-popup behavior.

### Annotation User Name

The Annotation User Name setting controls the name used when adding annotations to the PDF. This is only visible when viewing annotations in an external program such as Adobe Reader or Mac Preview.

### Confirm Annotation Deletion

Turn this setting off to disable confirmation when deleting annotations.

### Auto-Add Markup to Annotations

Turn Auto-Add Markup to Annotations on to have iAnnotate automatically add the marked-up text for [Markup annotations](#) to the annotation's pop-up note content.

### Wrist Detection

The Wrist Detection setting allows you to control wrist detection when creating [Drawing annotations](#). This allows you to rest your palm or wrist on the display while using a stylus, in the same way you would with a pen and paper.

### Right-Handed / Left-Handed

Right and Left-Handed settings are effective for most right or left-handed users. If you write with a hook style, with your hand above the written text (common with left-handers), try the **Hook** setting. Some users may get the best performance using the **Knuckle Only** setting - in this case, only rest the knuckle of your pinky finger on the display while keeping your palm and wrist raised.

You can disable all wrist-detection heuristics by selecting **None**.



## 9.6: Sharing Settings

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### Default E-mail Subject

Use Default E-mail Subject to set the subject line of any e-mail message sent via iAnnotate. Leave this setting blank to use a default subject based on the name of the PDF you're working with.

### Default E-mail Body

This setting controls the default text that is included along with mails sent out using iAnnotate.

### Include Bookmarks in Summary

The **Include Bookmarks in Summary** option controls whether or not bookmarks are included when e-mailing a [text annotation summary](#).

## 9.7: Security Settings

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### Save PDF Passwords

Turn this option on if you wish to have iAnnotate save the passwords for your password-protected documents. If you turn this option off, all your saved passwords will be erased.

### Application Lock

Turn this option on to enable an application lock for iAnnotate. When locked, iAnnotate will require the specified password before starting up.



It is not possible to recover a lost or forgotten password.

### Lockdown Mode

Turn this option on to put iAnnotate into 'Lockdown' mode. When locked down, iAnnotate will disable all network-based document import and export options. (It is not possible at this time to disable iTunes file sharing.)

When turned on, you will be prompted for a password. The only way to disable lockdown mode will be to supply the same password. It is not possible to recover a lost or forgotten password.

### Warn on Bad WebDAV Certificate

Turn on Warn on Bad WebDAV Certificate to have iAnnotate alert you to a possible problem with a credentials certificate whenever you try to connect to a remote site using WebDAV. When the warning appears, there is some risk that the site may be an imposter.



You must quit and restart iAnnotate if you ever turn this from On to Off. (Double-tap the home button to make sure iAnnotate is not still running in the background.) Although iAnnotate will affect certificates and/or associated permissions that are stored in your keychain, even if this setting is on, connection information is sometimes cached and so must be reset.

## 9.8: Advanced Settings

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### Aji PDF Service Host

Aji PDF Service Host allows you to specify the hostname or IP address of a fixed Aji PDF Service (APS) server to use here. By default, iAnnotate will automatically discover any APS service on your local network, so usually you do not need to configure this option.

### Aji PDF Service Port

The TCP/IP port to use when connecting to fixed Aji PDF Service (APS) server. By default, iAnnotate will automatically discover any APS service on your local network, so usually you do not need to configure this option. If you have configured iAnnotate to use a specific APS host, then you need to have that host use a specific port (in APS settings) and then set this value to match.

### Disable Thumbnails

Turn this on to disable thumbnail generation. This can improve the performance of the file manager for large libraries.

### Regular Expression Search

Turn this on to allow in-document search using regular expression. For advanced users. See <http://userguide.icu-project.org/strings/regexp> for the regular expression syntax.

### Open Links in Integrated Browser

By default, links from PDF files are opened in the integrated web browser. Turn this option off if you wish to have them loaded in Safari.



From the integrated browser, you can use the Open in Safari button on the toolbar to open the URL in Safari.

### Browser Compatibility Mode

Turn this option *on* to use Compatibility Mode when using the integrated Web Browser. This is useful for downloading PDFs from websites which don't work properly within the integrated iAnnotate browser. For most sites, you won't have to use this; but if a site is not working properly, or if the PDF downloads in the browser (instead of your Library), try using Compatibility Mode to fix the issue.

To use Compatibility Mode, browse until you have loaded a PDF in the integrated browser. Then, tap the Action button, located to the left of the URL bar, and choose Download PDF.

### Auto-Process Documents

When a PDF is brought onto the iPad via any means other than through Aji PDF Service, it needs to be processed by iAnnotate before you can do certain things with it, such as search or highlight it. When the Auto-Process Documents setting is On, this will happen automatically when iAnnotate sees a new document arrive.

However, if you often transfer big documents, you may wish to process the documents manually when you have time to wait for it to finish. This can be done here. It can take some time when this is done on the iPad because of processing memory limitations inherent in the device.



If you turn off processing, certain functionality (like search and highlighting) will not be available.

If you have a large library of files to transfer, we highly recommend [using the Aji PDF Service](#), so that this time-consuming on-device processing can be skipped (it is done on your computer instead, where it is much faster).

See also the Process Documents when Opened option.

### **Process Documents when Opened**

When a PDF is brought onto the iPad via any means other than through Aji PDF Service, it needs to be processed by iAnnotate before you can do certain things with it, such as search or highlight it. When this setting is On, this will happen automatically when you open such a document for the first time in iAnnotate.

If you often transfer big documents, you may wish to switch this Off and process the documents manually when you have time to wait for it to finish. This can be done via the Advanced sub-menu of the document's [Information](#) menu. It can take some time when this is done on the iPad because of processing and memory limitations inherent in the device.

If you have a large library of files to transfer, we highly recommend using Aji PDF Service, so this time consuming on-device processing can be skipped (it is done on your computer instead, where it is much faster). See also the Auto-Process Documents option.

### **Auto-Add to Full Library Search**

When this setting is off, the text from a new document will not be added to the full-library index by default. This will prevent the document from showing up in full-library searches, even if it contains the search terms.

You can add a document to a full-library search later, if it didn't happen upon its arrival, via the Advanced section of the document information screen. This process can take some time due to processing and memory limitations inherent in the device.

## 10: Other Topics

### 10.1: Using VGA Output



Present toolbar  
icon

iAnnotate includes the ability to present your documents using the *iPad Dock Connector to VGA Adapter*. When the dock connector is connected to your iPad and a valid external display (monitor or projector), iAnnotate will allow you to present one of your document tabs on the external display.

When a valid display is connected, you can begin the presentation in one of two ways. First, you can use the Present option from the tab context menu. Also, you can use the Present toolbar icon, if you have added it to one of your toolbars.



This option is only available when the Dock Connector is properly connected.

When presenting, the external display will mirror your iPad as you scroll and zoom. All annotations will also be mirrored, including popups as you display and hide them. When you create or edit annotations, these will also be reflected on the VGA display.



You can switch between document tabs on your device without affecting the VGA display; a green indicator will flash on the tab that is being presented. This is especially useful if you have one document that you'd like to present, and notes in another document.

To end presentation mode, use the End Presentation option from the tab context menu, or tap the End Presentation toolbar icon.

## 11: Understanding PDF Processing

iAnnotate uses built-in support (the Quartz rendering engine) to display and navigate PDF documents. However, this engine is limited to displaying the document on-screen only and is not able to perform the processing required to access detailed information about the document. This is why iAnnotate has to process documents in order to get this information into a format that is more readily usable.

This information includes data about the textual content of the document, including the locations of words on pages -- information which, perhaps surprisingly, is not readily available from PDF documents. This also includes standard PDF information such as the PDF Outline and existing annotations (including PDF links, which are a form of annotation).

iAnnotate includes built-in support for processing documents on the device. In many cases, this will be sufficient and the use of APS will not be required. However, it is often faster and more convenient to use the Aji PDF Service on your computer for this task, especially for very long or complex/unusual documents. The Aji PDF Service takes advantage of the superior processing power of standard computers to do all of this hard processing work and provide the information to iAnnotate in a way that is more suited to the device capabilities.