annotate

Documents Tab Actions

Upload a file or drag and drop into document area

Add a new folder

Share a Workspace

Documents Tab

Sort on date & no. of notes

Hide/show document details

Change Notifications

Templates can be used to recreate settings to be used in other Workspaces

Right click on blue bar to open menu and chat (document viewer guide)

Save as Template   X

Template Name: Standard

Description: For all general docs

Include:
- ☑ Folder Structure
- ☐ Documents
- ☑ Document Status
- ☑ Document Metadata
- ☐ Users
- ☑ User Roles
- ☑ User Groups
- ☑ Document Tags
- ☑ Section Tags
- ☑ Note Tags

Share:
- ☐ Public
- ☑ Private

Cancel   Publish

Context menu:
- Open
- Download
- Share
- File Actions ▸
- Properties ▸
- Advanced ▸

Sub-menu 1:
- Rename
- Move To
- Copy As
- Delete

Sub-menu 2:
- Metadata — Metadata for this document
- Document Tags — View or edit document tags

Sub-menu 3:
- Notifications — Get Notifications on this document
- Compare With
- Parallel Review — Compare , Review or Replace this document with a new one
- Replace

Notes Tab Actions

Select Group

Select Filter

Right click Note to preview document

Notes Tab

Export Notes

Workspaces/ Workspace templates

Document preview controls

Reply to comment

Mark as resolved

Edit or Delete your Note

Double click opens document