



# Welcome to iAnnotate v 1.3!

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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* which 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 [iAnnotate Forums](#) or the [Aji Support Site](#).

### 1.1: QuickStart Guide

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 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

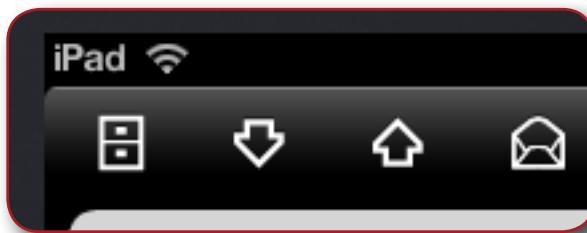
### Top Toolbar

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

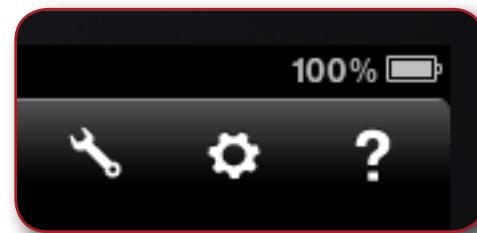
The **Library** icon in the upper-left gives you access to your document library -- use this to find and open new document tabs. Next over is the Download icon, where you can get documents from your computer using the **Aji PDF Service**, the **web**, or a **Dropbox** account. The **Upload** icon allows 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



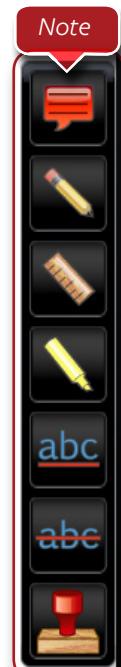
Right top toolbar

### 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.

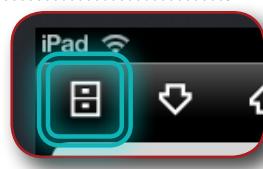
Note that when editing toolbars, you can also tap the Add button in the lower-right corner to add another toolbar. iAnnotate comes with several useful pre-defined toolbars, or you can create your own custom toolbars from scratch.



Document Toolbar

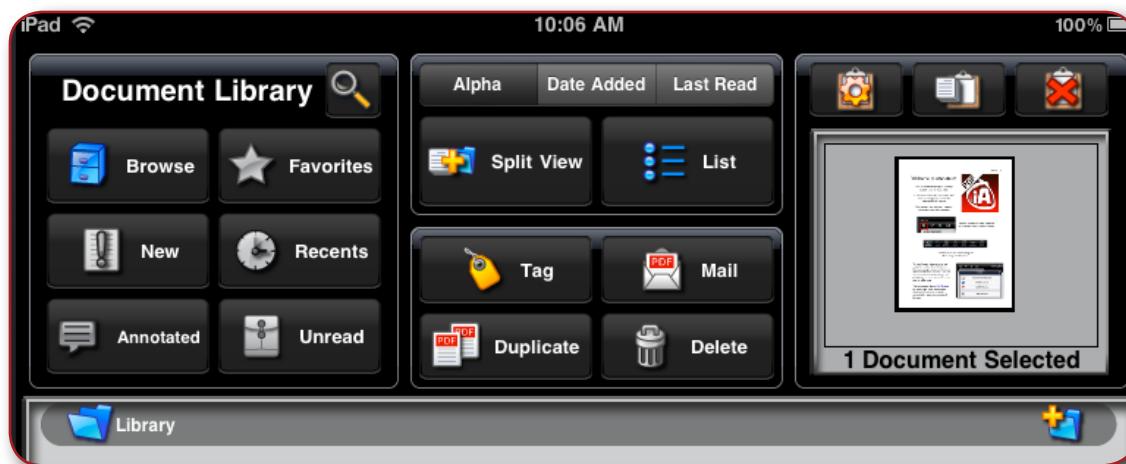
## Opening Documents

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.



Library button

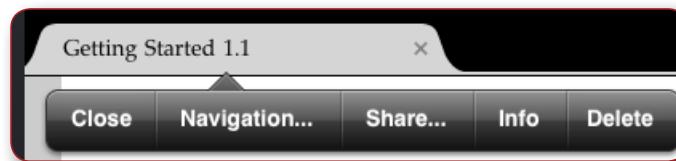
(See [3: Transferring Documents into and out of iAnnotate](#) for more details on obtaining new documents.)



The Document Manager

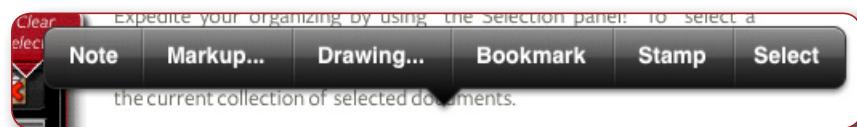
## Using context menus

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 a context menu on the PDF display itself, by doing a tap-and-hold anywhere on the document display. This will bring up a context menu with a choice of annotation options.



Annotation Context Menu

## 2: In-app help

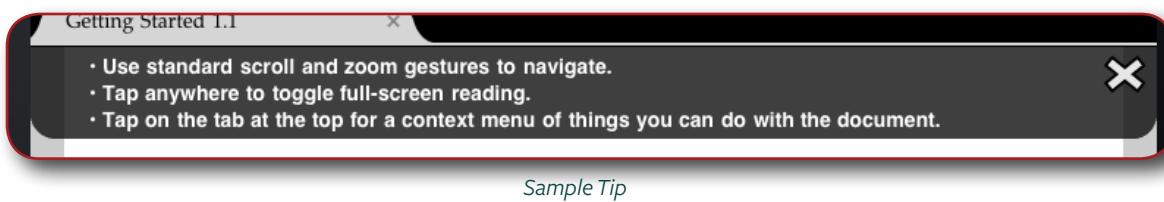
iAnnotate includes several ways to help you become familiarized with the features and interface.

### 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.

Note that 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.



### 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.

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,



Help button

### Further Resources

For further help, troubleshooting tips, or support requests, please visit the [iAnnotate Forums](#) or the [Aj 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.

**NOTE:** if your attached PDF is one-page only, there is a bug in the Mail app that prevents you from using the Open In... functionality. In this case, tap-and-hold on the image of the PDF page, and choose the Copy option. Then, quit Mail and launch the iAnnotate app, and choose the Import From Clipboard option from the Download menu. This will allow you to view the PDF in iAnnotate. (It will be given the name Imported Document, but of course you change this in the PDF *Information* screen.)

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

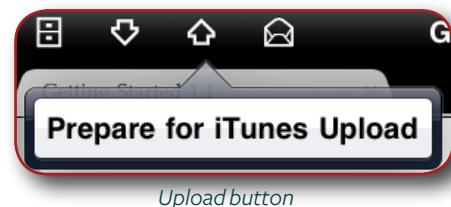
You can use the iTunes file sharing feature to transfer documents into and out of iAnnotate.

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, 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.

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. Note that due to the limitations in iTunes file sharing at this time, it is not possible to transfer folders -- only individual PDF documents. (Note that you can multi-select and drag many PDF documents in at once, but no folders will be preserved.)

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



Upload button

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.

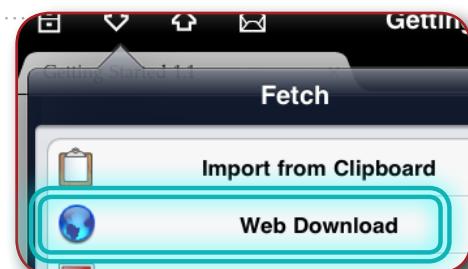
### **3.3: Downloading documents from the Web**

#### **Using the Integrated Web Downloader**

To use the integrated Web Downloader, tap the Web Download option under the download menu in the top toolbar. 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.

The integrated browser will automatically detect when you navigate to a PDF link, and then download the linked file into your document library. 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.

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. (But note that you cannot leave the iAnnotate application, or else the download will be cancelled.)



*Download documents from the web*

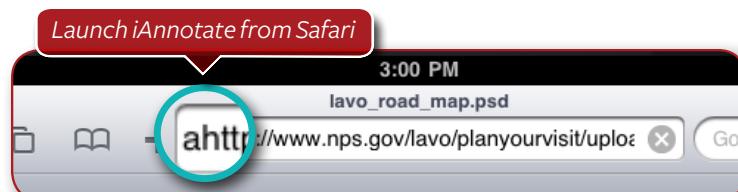
Read: 2010-Summer-Hoodoo.pdf 

*Arrow button*

#### **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 "**a**http://myurl/...", or "**a**https://myurl/...". Then tap the Go button – this will launch iAnnotate and open the PDF or web page that you were viewing in iAnnotate.

Note that 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. (Note that choosing iAnnotate here will not do anything -- it is displayed there by default by the device operating system.)

Note that 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**

To work with files on Dropbox, first you need to have an account on Dropbox and then enter your Dropbox account information into iAnnotate. Choose the Create Account option from the download menu in the top toolbar, or use the + button in the upper-right of the download menu to create a new account. 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.

When you have annotated your files, tap on the tab context menu for any document downloaded from Dropbox, and then choose Share..., Upload..., and Dropbox to upload your annotated document back to your Dropbox folder.

You can also use the Upload arrow from the top toolbar, then choose Upload to Account, then choose your Dropbox account, in order to upload all annotated documents back up to your Dropbox account.



Add Dropbox account

## **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.

Note that 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 see our [forums](#) or contact our [Support Team](#) at any time if you are having any troubles with your security or firewall setup, or if you are having troubles getting the iAnnotate app and Aji PDF Service to communicate.

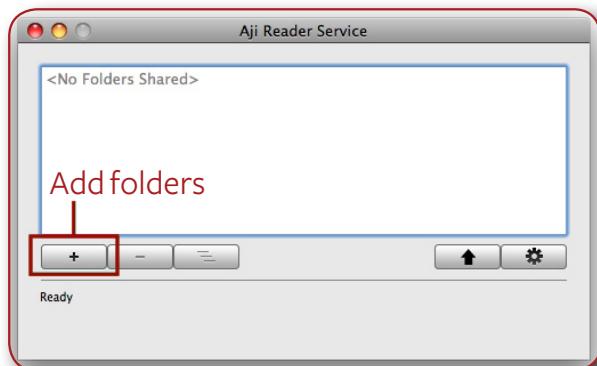
For more details on using the service to share documents, see the [Sharing](#) section below.

### 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.

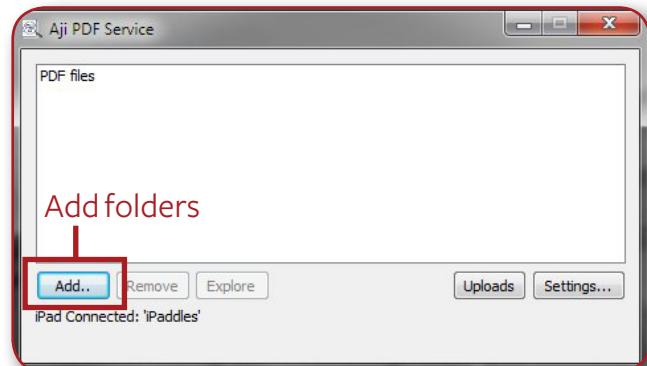
The Aji PDF Service displays the list of shared folders in the white box in the middle of the application window. Use the Add button to choose a new folder to add:

**Mac:**



Adding a new Shared Folder

**Windows:**



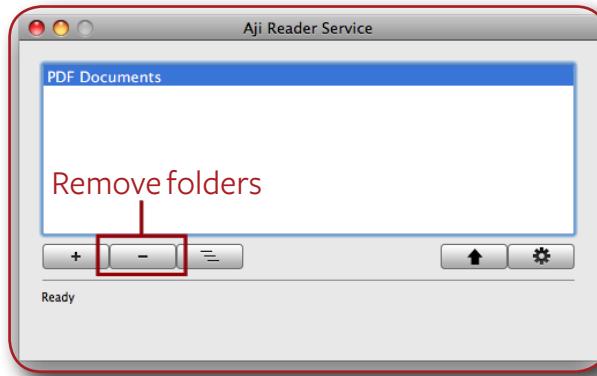
Adding a new Shared Folder

**NOTE:** 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 would be able synchronize with all of your PDF documents in those folders as well as in any subfolders.

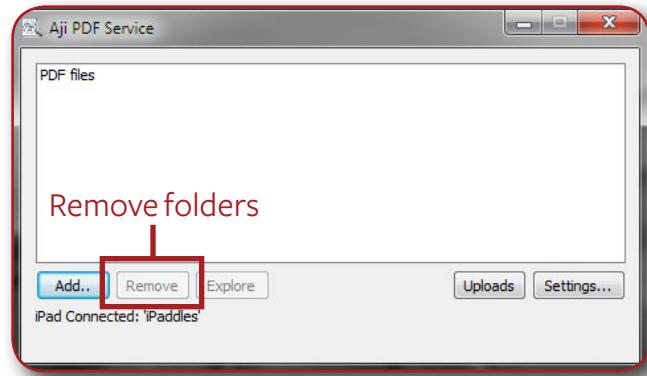
You can also use the Remove button to remove folders from the shared list after highlighting the folder to be removed.

**Mac:**



Removing a Shared Folder

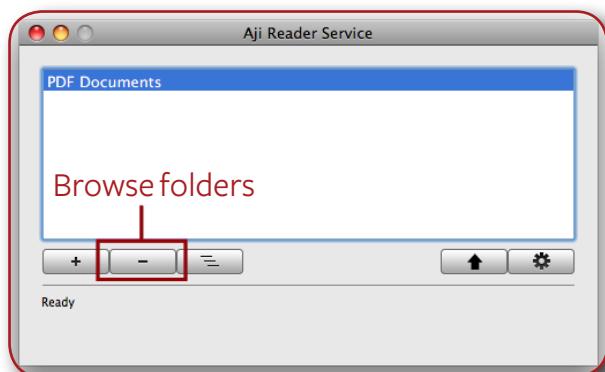
**Windows:**



Removing a Shared Folder

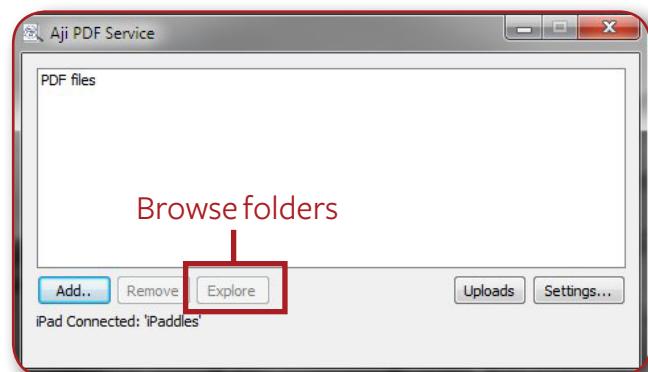
On the Mac, you can also use the Browse button to locate the folder on your computer. Use the Explore button in Windows.

### 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.

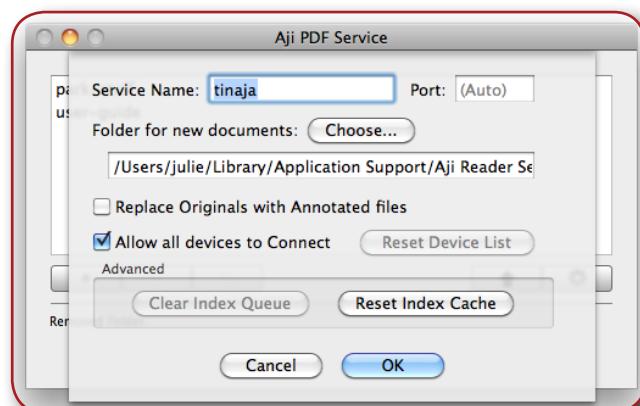
### 3.6.3: Settings

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

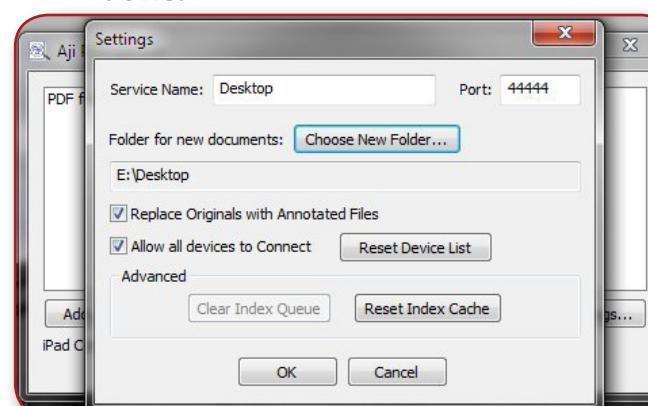
The Service Name controls how your server appears from iAnnotate; usually the default is acceptable, but you may wish to change this setting here.

### 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.

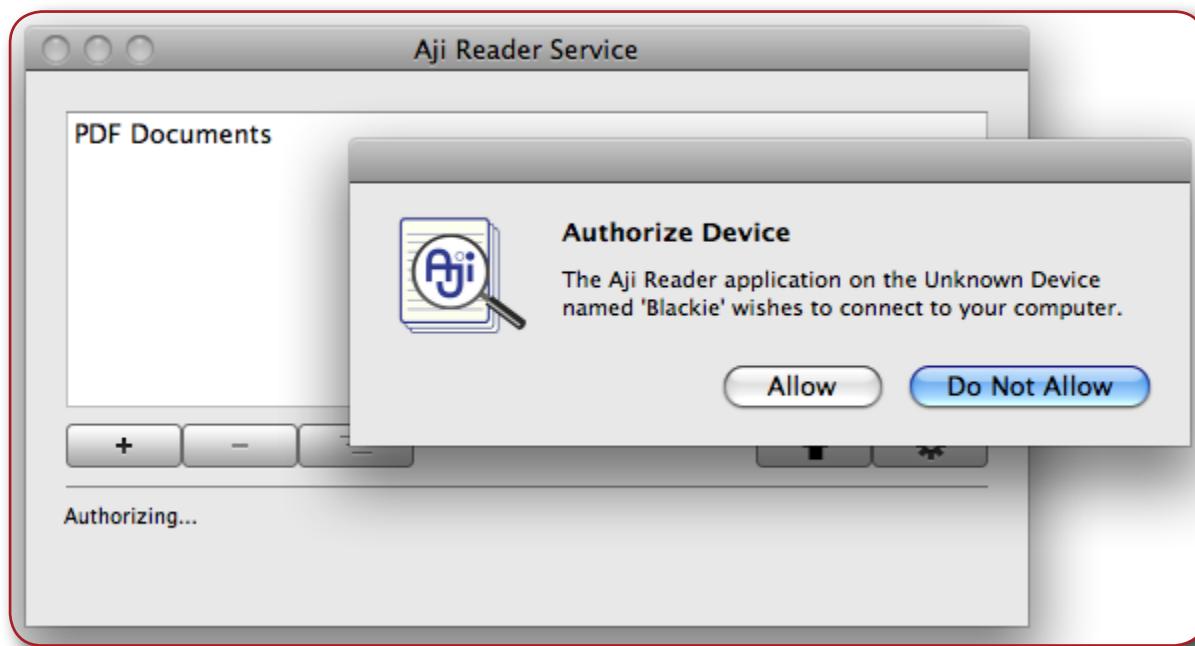
## Device Authorization

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.

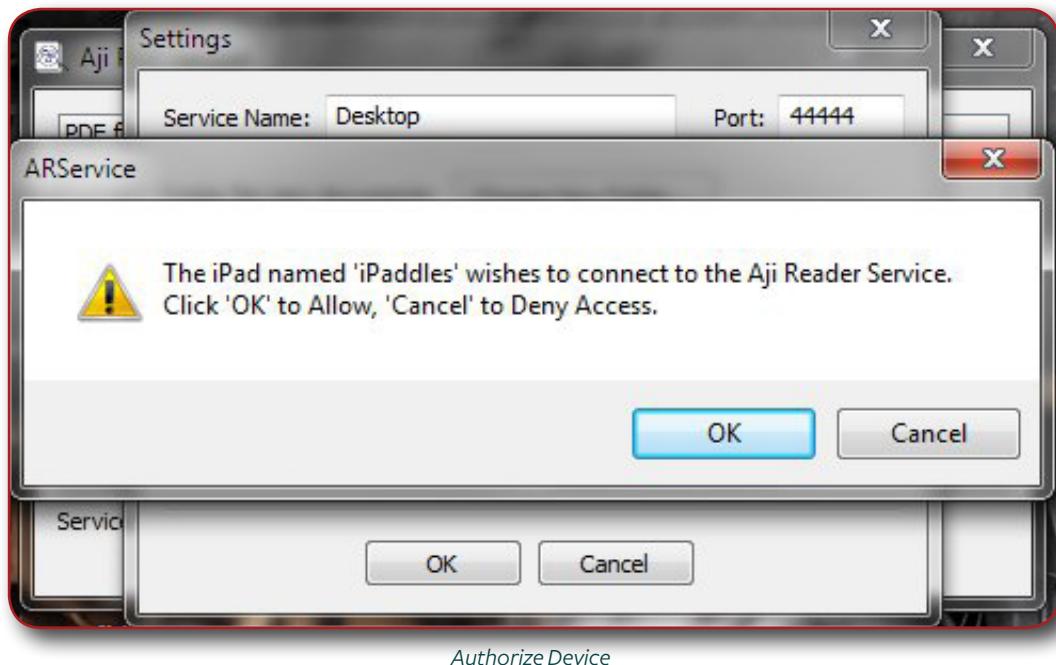
Some users, however, will wish to control access to their shared documents and ensure that only authorized devices are allowed to connect. If you wish to do this, uncheck the Allow all devices to connect check box. Also, you will probably want to use the button to reset the list of authorized devices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

Note that a device only needs to be authorized once; after initial authorization, the device is always allowed to make subsequent connections. If you wish to deauthorize a device, use the Reset Authorized Devices button under Settings.

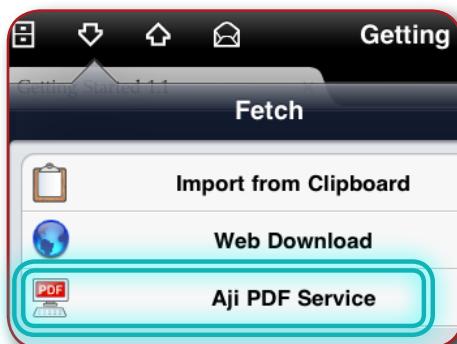
### 3.6.4: Troubleshooting

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. Also, the [iAnnotate Forum](#) contains detailed information about problems that other users are currently running into -- please check there to see if a resolution can be found for your issue.

Finally, Aji support is also available to help -- you can put a request on the forums, or [e-mail us directly](#).

### 3.7: Transferring documents using APS



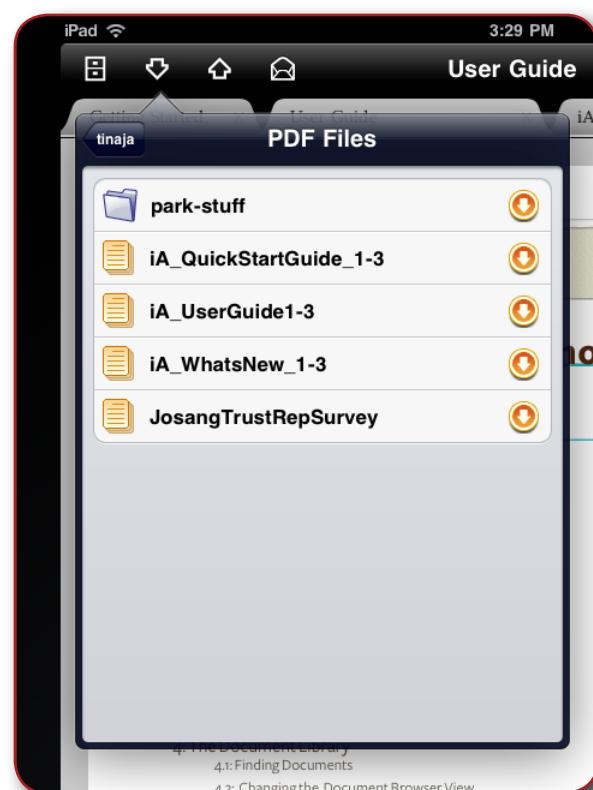
*The Download Menu*

Once you have APS set up on your computer, you can transfer documents in 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. Note that 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. Note that 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.

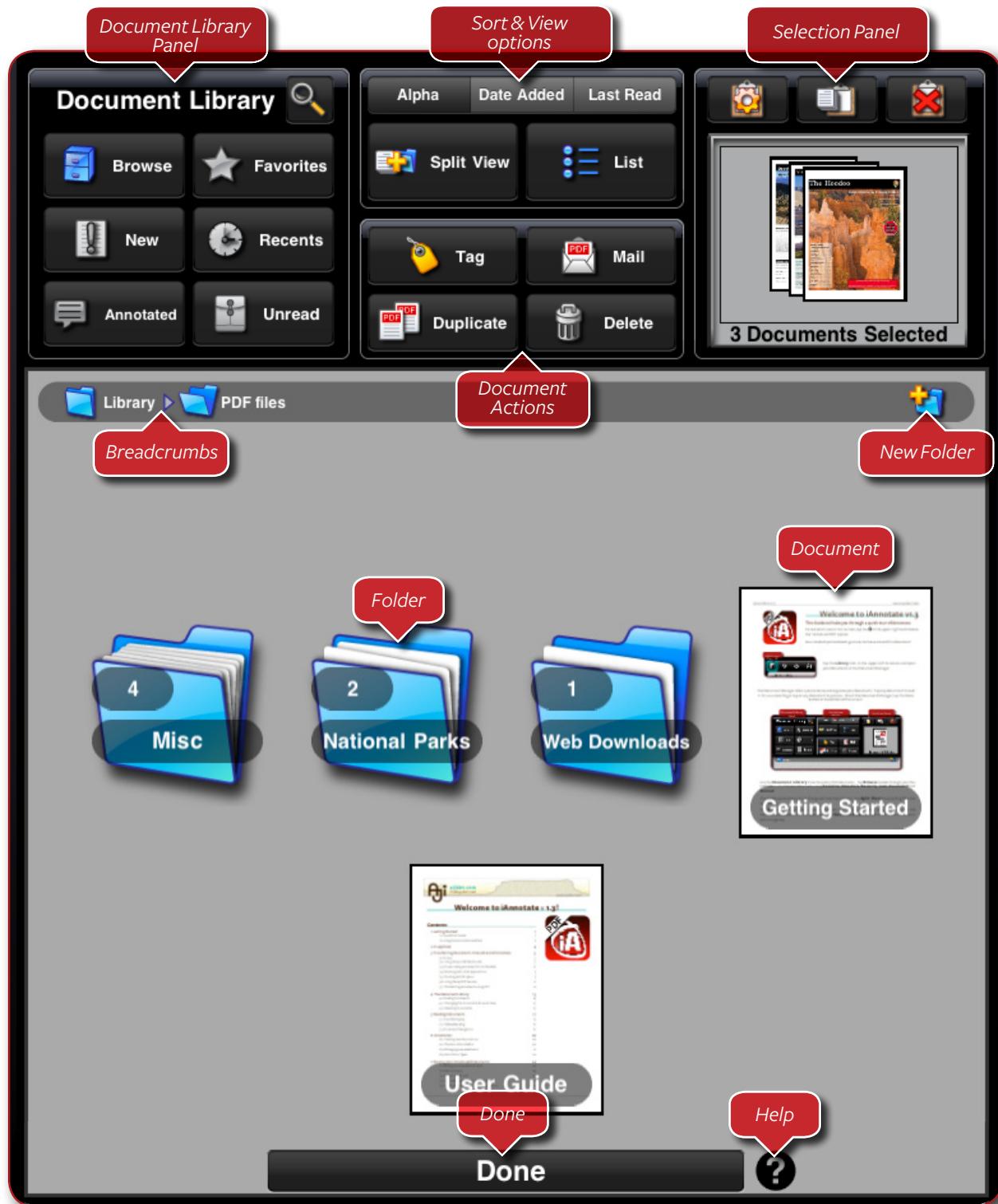
Note: if you wish to use APS while you are not on a local network, you can set up custom APS host and port settings in iAnnotate under Advanced settings. The port will need to match the custom port specified in your APS settings, and the hostname will need to be a valid network-reachable address of the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



*Selecting Documents or Folders to download*

## 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.



## 4.1: Finding Documents

By default, the Document Manager 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:



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.



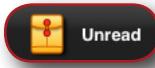
**New** displays the documents in the order that they were added to the Library, newest documents first.



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



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



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

### 4.1.1: Library Search



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.

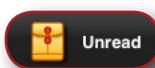
Search icon

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.



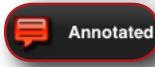
Narrow the search by switching from **All Files** (the contents of the entire library) to one of the other sort options:



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



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



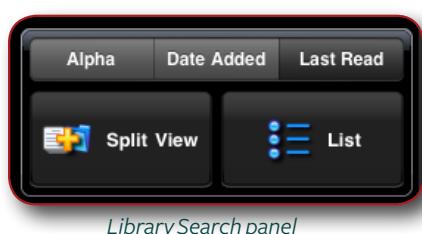
**Annotated** documents searches all documents that have been previously marked up in iAnnotate.



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



Library Search panel

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 [Z: 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.

Note that 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 Interface 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.

#### 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 Document Display.



Page Locator

#### 5.1.2: Copy and Paste



Select Text

iAnnotate allows you to select and copy text from PDF documents onto the iPad clipboard. The copied text can then be pasted in any text view or in other applications.

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

**icon** When you enter Select Text Mode, the interface is hidden, allowing you to use the full screen area for selecting. Also, the End Select Text icon appears in the upper-left corner -- tap this when you are done selecting text.

To select text, simply drag your finger over the area which has the text you'd like to copy, and lift when finished. Note that you can select multiple, non-contiguous areas of text.

When finished, tap the End Select Text icon, and a menu will appear allowing you to copy or hide the selection. If you tap elsewhere, this menu will hide -- then later, you can tap the selected text again to have the menu reappear.

Note that 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.



End Select Text icon

## 5.2: 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.

You can switch between tabs by simply tapping the corresponding tab button. Note that you can also drag tabs to reorder them.

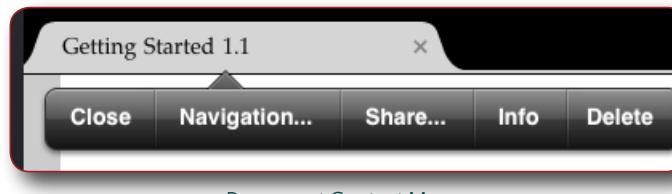
Tap the **X** button on the tab area to close the active tab. Note that your most recent position and zoom level will be remembered by iAnnotate, even if you close the tab.

It's worth noting that 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.



### 5.2.1: 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 the tab of the document you are currently working with. (You can also tap-and-hold the tab of an inactive document to bring up the context menu without switching to it.)



*Document Context Menu*

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

Tap **Navigation...** to access navigation actions available for the PDF. **Search** allows you to search the full-text of the document. **Bookmarks** will display a list of the *bookmarks* you have previously added to the document. Tap **Outline** to see the *outline*, or table of contents, of the PDF. **Go To Page** allows you to enter a specific page number to navigate to.

The **Share...** button opens a sub-menu with options for sharing your documents. To *E-mail* your PDF, tap the **E-mail** button. 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** will use Aji PDF Service to *Upload* your document to the uploads folder on your computer. (Note that you must have Aji PDF Service running on your computer in order to upload.)

## Document Information

Tap **Info** 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](#). 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 [iAnnotate Forums](#) or the [Aji Support Site](#).

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



## 5.3: Document Navigation

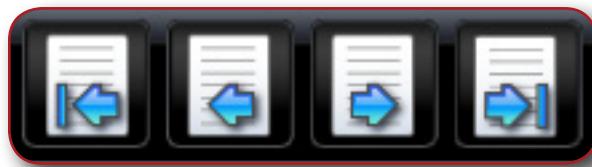
In addition to the standard scroll gestures, iAnnotate offers several additional ways to navigate your documents.

### 5.3.2: Page Navigation



Go To Page icon

You can use the Next Page, Previous Page, First Page, and Last Page buttons or menu commands to navigate by pages. In addition, you can choose Go To Page in order to specify a particular page number to jump to.



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

### 5.3.3: 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. Note that you can also change the color associated with bookmarks, in case you'd like to organize your bookmarks by color.

To go to a bookmark, use the Navigate Bookmarks button or menu command (it looks like a stack of bookmark icons). This will bring up a popup display which lists all bookmarks in the current document -- select one to navigate to that bookmark.



Navigate Bookmarks icon

### 5.3.4: PDF Outline



PDF 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 using the Outline button or 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 blue arrow button to view the child outline elements.

### 5.3.5: Annotation Navigation



Navigate Annotations icon

If you have created annotations on your document, you can use the Navigate Annotations button or menu command to display the list of annotations and quickly locate them. The annotations list indicates the type, color, and page number of the annotation, along with the text that is associated with it.

### 5.3.6 Search



Search icon

One of the most powerful functions of iAnnotate gives you the ability to search the full-text of a document. Use the Search button or context menu command to show the search interface of the document that you're currently reading. In the search interface, tap inside the text box to enter search terms, hit the **Search** button on the keyboard popup to start the search. Search results will be indicated with a yellow box around them on the PDF; navigate through the search results by tapping the back and forward arrows on the left side of the search interface. When finished, tap Done to close Search.



Search Interface

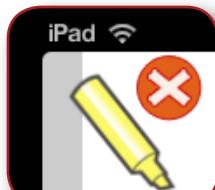


Search Result

## 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 to easily make notes and mark up your documents, as well as share them with others.

### 6.1: Creating new Annotations



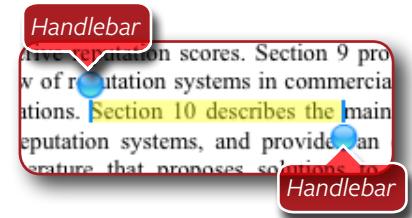
Highlighter  
in Annotation Mode

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; note that 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.

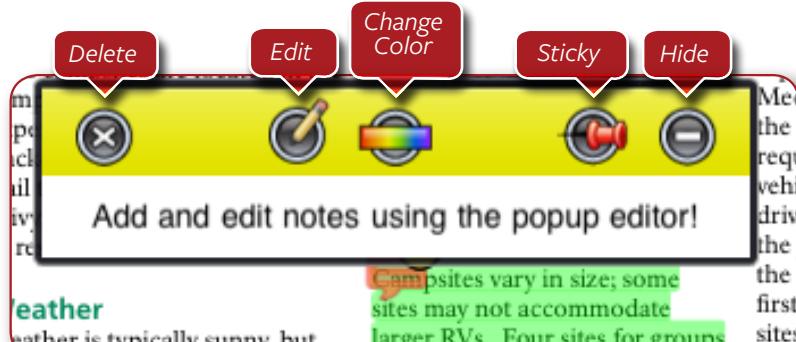
Note that Bookmark, Note, and Drawing annotations can be repositioned by simply dragging them: hold your finger on the annotation and then drag it to the new location.



### 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 picker, allowing you to change the color of the annotation you're working with.



For Stamp annotations, there will be a **Transform** button on the toolbar, which allows you to move, rotate or resize the stamp image.

*Transform*

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.

Finally, it's worth noting that, at this time, annotations that existed in the original PDF document are not editable. We plan to allow the editing of existing annotations in a future update.

## 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.

Note that 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.



*Sticky*

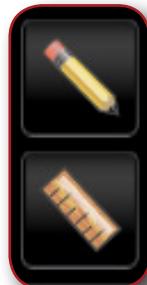
In addition to normal popup behavior, iAnnotate also includes the ability to make selected annotation editors Sticky, using the pushpin icon on the toolbar. When the pin is in, the annotation editor is Sticky -- this means it will never be hidden automatically. You can use this to ensure that the note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

Note that 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: Annotation Types

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

### 6.4.1: 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.

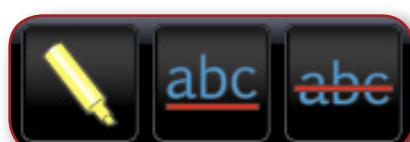
You can use the Pen Transparency slider in the **Annotation Settings** menu to control the translucency of all existing Drawing annotations. Tap the Change Color button on the Annotation Popup Editor to adjust the color of your drawing; edit the text contents of the annotation with the Edit button.

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.



Sample Finger annotation

### 6.4.2: Markup Annotations

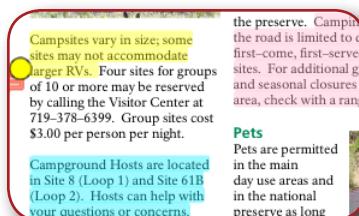


Highlight, Underline, Strikeout annotation icons

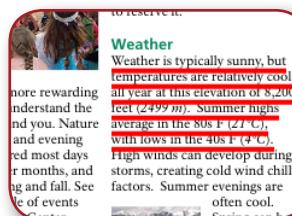
Markup annotations include highlight, underline, and strikeout annotations. These annotations track the text in your document.

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.

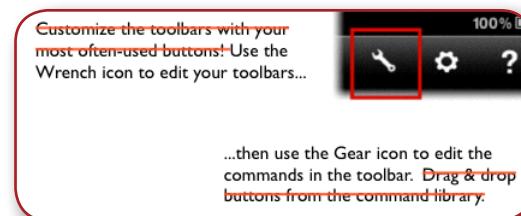
Note that you can optionally include a text comment with your markup annotation and adjust the color using the popup annotation editor.



Sample Highlight annotation



Sample Underline annotation



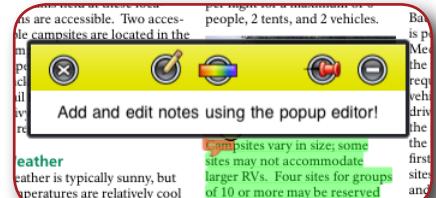
Sample Strikeout annotation

## 6.4.3: Note Annotations



Note annotation icon

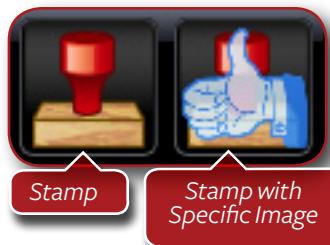
Note annotations allow you to associate a text note with a specific location in your document. Enter the text in the annotation editor -- note that you can scroll inside the annotation editor if you have a lot of text in your annotation. Note annotations also have a color associated with them, in case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



Sample Note annotation

## 6.4.4: 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 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.



Stamp Library

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. Note that you can't resize and rotate at the same time; you must tap the Transform button again to switch modes.

You may also add a text annotation to any stamp by tapping the Edit button. When you're finished, tap inside the box to exit transformation mode.

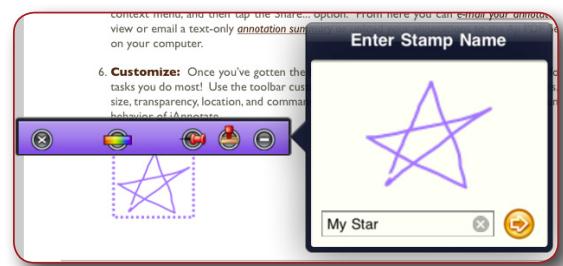


Sample Stamp annotation

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.

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.



Creating a custom stamp

## 7: Sharing Your Annotated Documents

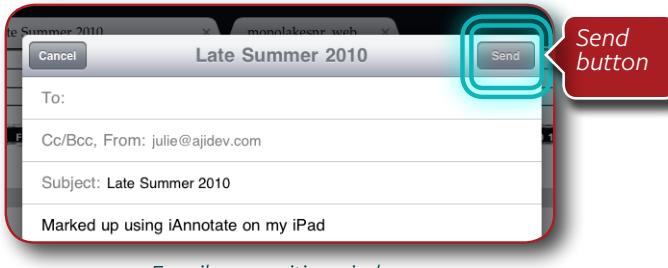
### 7.1: Mailing Annotated Documents

If you would like to e-mail an annotated document, simply tap the Mail button on the left-hand top toolbar. Tapping the mail icon causes a popup menu to appear with three options: Mail Document, **Mail Summary**, **Mail with Summary**. Tapping Mail Document will open the e-mail composition window. 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.



Mail icon

Alternatively, you may access the Mail Document options by tapping **Share...** on the **Context Menu**.



E-mail composition window

### 7.2: Mail 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 mail icon and selecting the Mail Summary option. 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.

**Mail with Summary** allows you to e-mail a text summary of your annotations, along with the PDF document itself. Tap the mail icon and select the Mail with Summary option. 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

Annotate allows you to select and copy text 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.

## 7.4: Uploading Using iTunes USB File Transfer

Please see section [3.2: Using iTunes USB file transfer](#) for detailed 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, please see section [3.4: Working with other applications](#) for more information.

## 7.6: Uploading Using the Aji PDF Service

### 7.6.1: Upload Annotated Documents



Upload icon

To upload an annotated document to Aji PDF Service (APS), tap the Upload button on the left-hand top toolbar or tap **Share...** followed by **Upload...** on the Context Menu. In the Upload popup menu, tap Upload Annotated to APS. Once you do this, a dialog box 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.

If there are no documents with new annotations available for upload, a dialog box will appear telling you so, and iAnnotate will not continue with the upload process.

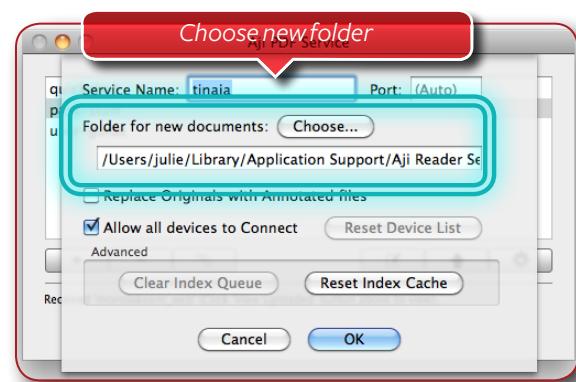
Note: you need to have Aji PDF Service open and running on your computer in order to upload or download documents in iAnnotate.



### 7.6.2: 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 APS. If the original document was uploaded from your computer into iAnnotate using APS, 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. You may 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 Interface 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. Note that in the toolbar editor, you can also control the transparency of toolbars, allowing you to read the content behind the 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 slider controls on the top of the screen to adjust the size and transparency of your toolbars. Note that 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. To add a command to your toolbar, simply drag the command icon from the 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.

Note that 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.



## 8.3: Working with Color Annotations



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 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.

Also, when you are using your toolbars, you can tap-and-hold on 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.

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



Color chooser

## 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: Document Display Settings

If the **Show Links** option is turned on, iAnnotate will display translucent blue boxes over links in your documents; this can help with visibility of links on some documents.

The **Show Page Locator** and **Show Page Number** settings control whether or not the page locator and page number display are visible in the lower-right corner of the document reading area.



*The Settings menu*

### 9.2: Annotation Settings

Use the **Pen Transparency** setting to control the translucency of the pen used when creating finger and line annotations. A low value uses an opaque color; a very high value will use a nearly transparent color.

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.

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

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.

Turn off **Confirm Annotation Deletion** to disable confirmation when deleting annotations.

### 9.3: Sharing Settings

The **Default E-mail Body** setting controls the default text that is included along with mails sent out using iAnnotate.

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

## 9.4: Interface Settings

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

Turn on the **Elastic Scroll Lock** setting to use a soft lock when Scroll Lock is turned on. This allows you to drag the document over horizontally, but it will always return to the locked position when let go.

Use the **Overlay Toolbars on PDF** setting to control whether or not the PDF reading view is resized 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.

The **Show Toolbars in Full-Screen Mode** option controls whether or not the toolbars are visible in full-screen mode.

When the **Open Links in Integrated Browser** option is on (the default), web links from PDFs are loaded in the iAnnotate browser. Turn this off to have iAnnotate quit and load the Safari app when web links are tapped.

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.

When **Tap-to-Advance** is on, tap the right edge of the display to advance one screenful, or the left edge to go back one screenful. Turn off to disable.

## 9.5: Notification Settings

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.

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

## 9.6: Advanced Settings

### 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.

## Auto-Process Documents

When a PDF is brought onto the iPad via any means other than through Aji PDF Service (APS), 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. Note that it can take some time when this is done on the iPad because of processing memory limitations inherent in the device.

Note also that 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 (APS), 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. Note that 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 APS, 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 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.

Note that this process can take some time due to processing and memory limitations inherent in the device.

## 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.

Note that 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. (Note that 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. Note that it is not possible to recover a lost or forgotten password.

## 9.7: Working with Colors

### Using the Color Chooser

iAnnotate uses a standard HSB color chooser, similar to the one used in Mac OS. Tap or drag over the color area to adjust the hue of your color. Also, you can use the bar on the bottom gradient to adjust the brightness.

Note that the 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.



Once you’ve selected your color, simply tap anywhere outside the color picker to hide the color chooser.

### Custom Colors

The iAnnotate color chooser also supports up to 16 saved custom colors, displayed at the bottom of the chooser.

If you wish to select and use one of these colors, simply tap the custom color -- that color will be selected, and the color chooser will close.

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.

## 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. (Note this option is only available when the Dock Connector is properly connected.) Also, you can use the Present toolbar icon, if you have added it to one of your toolbars.

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.

Note that 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.