

## Add notes to a document

### ApplicationXtender Web Access (WX)

*and*

### ApplicationXtender Document Manager (AX)

In ApplicationXtender, you can mark up a document using the annotation toolbar. With these tools, you are able to add typewritten or handwritten notes, or highlight items of interest. These annotations are saved as a separate layer – think of it as a transparency on top of the original document. This means that the document can be viewed or printed with or without the annotations.

*Note:* Annotations may only be made on PDF and TIF images. They cannot be made on “foreign files” (for example, Word, Excel, PowerPoint).

*Note:* If the Annotation toolbar is not visible in Document Manager (AX), follow the menu path **View >> Toolbars >> Annotation**.

*Note:* If the Annotation toolbar is not visible in Web Access (WX), change the setting in User Settings, on the Interactive View tab.

#### To add a typewritten note to an image:

1. With the appropriate document open, single-click the **Text** button on the Annotation toolbar.



2. Click on the image in the spot where you'd like your note to appear. The Annotation Text Editor appears.
3. In the Annotation Text Editor, type your note.  
*Note:* If you would like the note to simply appear as an icon on the document, select the Display as icon checkbox.
4. Click the **OK** button to close the editor and return to the document.  
The note appears at the spot where you clicked in step 2.
5. To save your note, click the **Save** button.



#### To add a handwritten note to an image:

1. With the appropriate document open, single-click the **Freehand** button on the Annotation toolbar.



2. To select a color for the handwritten note, click the **Color**

button and select a color.



3. To change the width of the line, click the **Line Width** button and select a width.



4. Click on the document and begin writing.
5. To save your note, click the **Save** button.

#### **To highlight:**

1. With the appropriate document open, single-click the **Highlight** button on the Annotation toolbar.



2. Click on the document. Drag the mouse pointer up or down.
3. To save the highlights, click the **Save Changes** button.

#### **To erase an annotation:**

1. With the appropriate document open, click the **Eraser** button on the Annotation toolbar



2. Click anywhere on an annotation to erase it.  
*Note:* It is possible to erase someone else's annotation. It is also possible to erase an annotation that was already saved.
3. To save the change, click the **Save** button.

#### **To release any of the annotation tools:**

1. Single-click the **Select** button on the Annotation toolbar.



## Rotate a page and save the view

### ApplicationXtender Web Access (WX)

If a document page is oriented in the wrong direction, you can rotate the page, and, depending on your user profile, save that change.

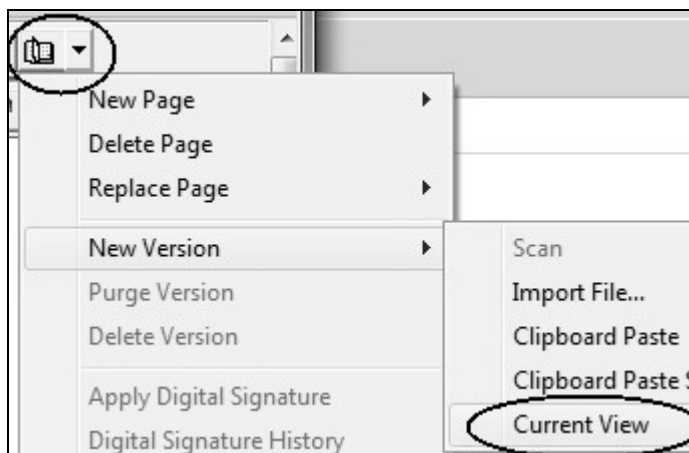
Saving a rotated page creates a new version of that page in Xtender, which means you must have privileges to add pages in Xtender.

#### To rotate a page:

1. Log into ApplicationXtender Web Access.
2. In Xtender, navigate to the document and then to the page you wish to rotate.
3. Click the **Rotate left** or **Rotate right** button.  
*Note:* If you do not see these buttons, you may need to change your user settings to “Enable Interactive Viewer”. For more information, refer to the Xtender User Settings and Maintenance documentation on the USNH Gateway page.



4. To save the rotated page, click the **Page menu** button.



5. Follow the menu path: **New Version >> Current View**.  
*Note:* If this option is grayed out, you do not have privileges to save a new page into Xtender and will not be able to save the rotated view.
6. The rotated page will be saved as a new version of the page. The most current version of the page is what will be displayed whenever you, or another user, open the document.

## Rotate a page and save the view

### ApplicationXtender Document Manager (AX)

If a document page is oriented in the wrong direction, you can rotate the page, and, depending on your user profile, save that change.

Saving a rotated page creates a new version of that page in Xtender, which means you must have privileges to add pages in Xtender.

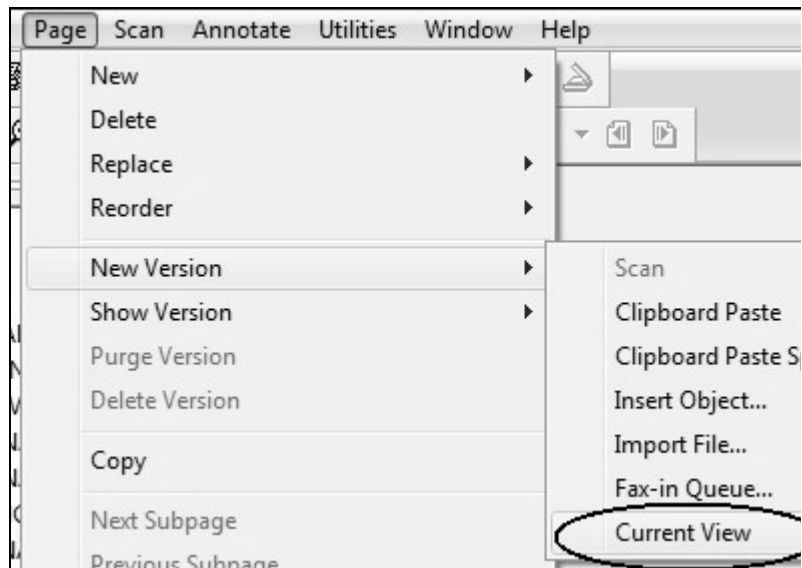
#### To rotate a page:

1. Log into ApplicationXtender Document Manager.
2. In Xtender, navigate to the document and then to the page you wish to rotate.
3. Click the **Rotate left** or **Rotate right** button.



4. To save the rotated page, follow the menu path: **Page >> New Version >> Current View**.

**Note:** If this option is grayed out, you do not have privileges to save a new page into Xtender and will not be able to save the rotated view.



5. The rotated page will be saved as a new version of the page. The most current version of the page is what will be displayed whenever you, or another user, open the document.

## Move / copy pages from one document to another

### ApplicationXtender Web Access (WX)

It is possible to either move or copy pages from one document to another. When you copy or move pages from a document, those pages are stored in a new batch in whichever application you select.

*Note:* You must have privileges to create batches in the target application. If you are moving pages from one document to another, you must also have privileges to delete pages. (If you are copying pages out of a document, you do not need to have the ability to delete pages.)

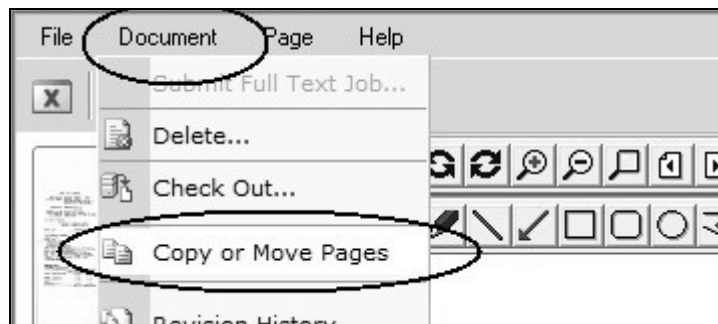
Copying pages from one document to another is a multi-part process:

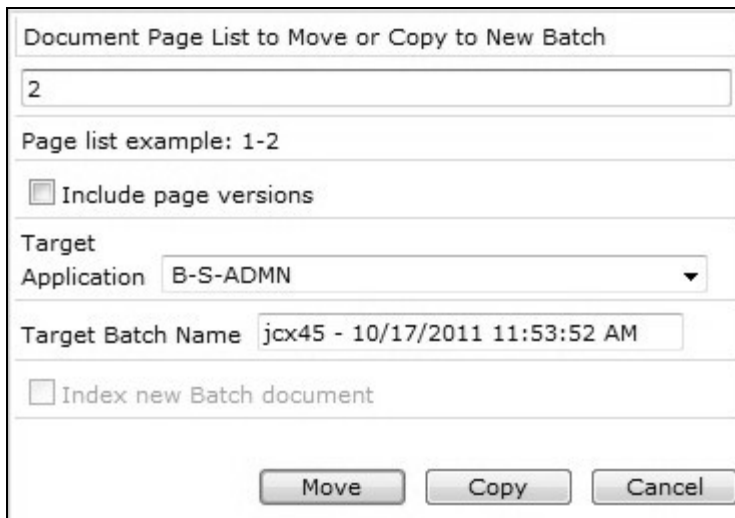
- copy the pages from the source document (this creates a batch with the new pages),
- index the batch, and
- delete the pages from the original document.

*Note:* If you move – rather than copy – the pages, you do not need to go back to the original document to delete the pages.

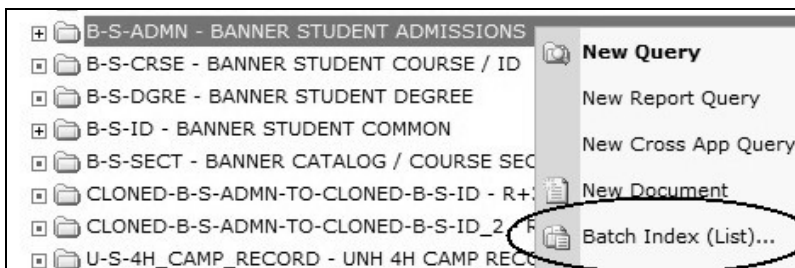
### To move or copy pages:

1. Log into ApplicationXtender Web Access.
2. In Xtender, open the document.
3. Follow the menu path: **Document >> Copy or Move Pages**.





4. In the **Document Page List to Move or Copy to New Batch** field, select the pages to copy or move.
5. In the **Target Application** drop-down, select the application the batch should be created in.
6. In the **Target Batch Name** field, name the batch or accept the default.  
*Note:* The batch name is temporary; it will not be seen in Xtender once the document has been indexed.
7. Click the **Move** or **Copy** button.
8. Close the document you just exported from.
9. Return to the **Application List**.
10. Right-click on the application, and select **Batch Index (List)...** from the menu.



11. Select the batch you just created and index it.  
*Note:* Refer to the Indexing documentation on the USNH Gateway page, if necessary.

12. If you did not move the pages in step 7, someone with privileges to delete pages should delete those pages from the original document.

13. Log out of ApplicationXtender Web Access.





## Move / copy pages from one document to another

### ApplicationXtender Document Manager (AX)

It is possible to either move or copy pages from one document to another. When you copy or move pages from a document, those pages are stored in a new batch in whichever application you select.

*Note:* You must have privileges to create batches in the target application. If you are moving pages from one document to another, you must also have privileges to delete pages. (If you are copying pages out of a document, you do not need to have the ability to delete pages.)

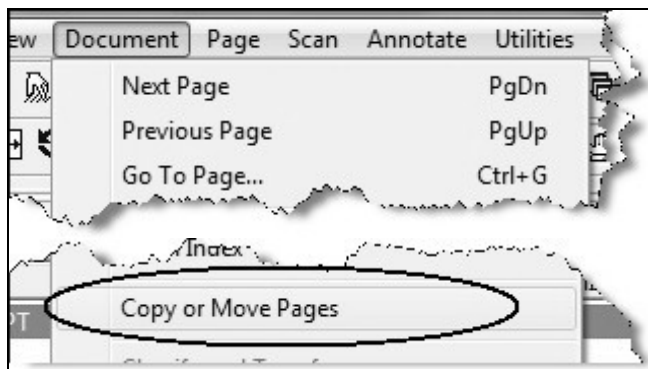
Copying pages from one document to another is a multi-part process:

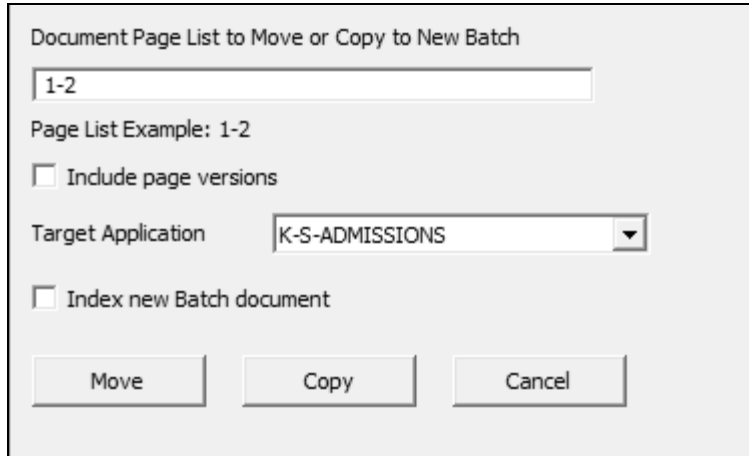
- copy the pages from the source document (this creates a batch with the new pages),
- index the batch, and
- delete the pages from the original document.

*Note:* If you move – rather than copy – the pages, you do not need to go back to the original document to delete the pages.

#### To move or copy pages:

1. Log into ApplicationXtender Document Manager.
2. Open the document you wish to move.
3. Follow the menu path: **Document >> Copy or Move Pages**.





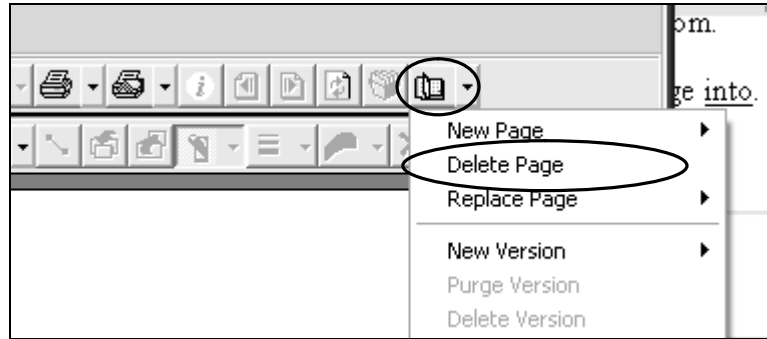
4. In the **Document Page List to Move or Copy to New Batch** field, select the pages to copy or move.
5. In the **Target Application** drop-down, select the application the batch should be created in.
6. Click the **Move** or **Copy** button.
7. Close the document you just exported from.
8. Follow the menu path: **Utilities >> Batch Index (List)...**
9. Select the batch you just created and index it.  
*Note:* Refer to the Indexing documentation on the USNH Gateway page, if necessary.
10. If you did not move the pages in step 6, someone with privileges to delete pages should delete those pages from the original document.
11. Log out of ApplicationXtender Document Manager.

## Delete a page from a document

### ApplicationXtender Web Access (WX)

#### To delete a page:

1. Log into ApplicationXtender Web Access.
2. Open the document you will be deleting pages from, and navigate to the page you wish to delete.
3. Click the **Page Menu** button.



4. Select **Delete page** from the menu.
5. A warning appears, asking “Do you really want to delete the current page?”. Click the **Yes** button.
6. The page is deleted from the document.
7. Log out of ApplicationXtender Web Access.



## Delete a page from a document

### ApplicationXtender Document Manager (AX)

#### To delete a page:

1. Log into ApplicationXtender Document Manager.
2. Open the document you will be deleting pages from, and navigate to the page you wish to delete.
3. Follow the menu path: **Page >> Delete**.
4. A warning appears, asking “Do you really want to delete the current page?”. Click the **Yes** button.
5. The page is deleted from the document.
6. Log out of ApplicationXtender Document Manager.



## Delete a Document

The ability to delete a document is not available to all users. If you do not have the appropriate security to delete documents, you will not be able to complete these steps.

### ApplicationXtender Web Access (WX)

To delete a document which has been saved and indexed:

1. Log into ApplicationXtender Web Access.
2. Open the document you wish to delete.
3. Follow the menu path: **Document >> Delete**.
4. A warning appears, asking “Are you sure you want to delete the document revision?”. Click the **OK** button.
5. The document is deleted.
6. Click through the acknowledgements.
7. Log out of ApplicationXtender Web Access.





## Delete a Document

The ability to delete a document is not available to all users. If you do not have the appropriate security to delete documents, you will not be able to complete these steps.

### ApplicationXtender Document Manager (AX)

To delete a document which has been saved and indexed:

1. Log into ApplicationXtender Document Manager.
2. Open the document you wish to delete.
3. Follow the menu path: **Document >> Delete**.
4. A warning appears. Click the **Yes** button.
5. The document is deleted.
6. Log out of ApplicationXtender Document Manager.

