



Electronic Plan Solutions

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## Using ProjectDox® - Flash Viewer



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## **1 About this Guide**

This guide provides an overview of the ProjectDox Flash Viewer Visualization Tool and provides details for the most commonly used features. The guide is designed for end users who are using their browsers to view documents, via web page links, that were processed and cached through the ProjectDox Server. The ProjectDox Flash Visualization Tool allows users to view, zoom, pan, rotate, review markups, search, and print documents and images quickly and easily.

## **2 Introduction**

Two document viewers are installed on the ProjectDox end user's machines, providing instant viewing and printing of a wide variety of document formats directly through the default browser. The viewer options include the heavily featured ActiveX viewer, and the limited-feature Flash viewer. Features of the ActiveX Java viewer includes a full line of annotation and redaction tools, publishing options, measurement capabilities, copy/search/select text, and more.

With Flash viewer, documents are processed as Flash output and are presented in this streamlined Adobe Flash-based viewer for quick viewing, searching, printing, and annotation review.

The Flash Viewer will be set up as part of the ProjectDox integration will launch from document links or menu commands within the ProjectDox application

### 3 Document Navigation

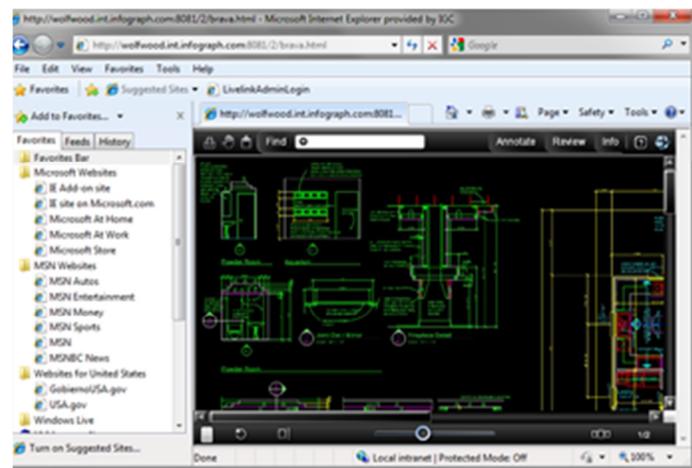
#### 3.1 Document View Controls



##### 3.1.1 Full Screen Mode



Use this button to toggle in and out of full screen mode. Full screen mode is especially useful on hand-held devices where screen space is limited.



##### 3.1.2 View Modes

When a document is opened, viewing in single page scroll mode is the default behavior.

You can choose to view double page or single page from the **Change View Control** button  depending on your preferences.

**Single page vertical scroll** - this mode presents the document for viewing in classic desktop document behavior, navigated using vertical and horizontal scroll bars and mouse wheel. When zoomed in, document pages are presented vertically, one on top of the next. When viewed at full extents, documents are presented horizontally

**Double page vertical scroll** - like single page, but documents are presented two pages at a time instead of one, and are always presented vertically, two on top of the next row of two. Use the side scroll bar (pulling down) or mouse wheel scrolling to navigate to the next or previous two pages.

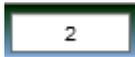
Common gestures are understood in this mode, such as Swipe direction (to drag to next/previous page), and Tap (click) to zoom in or out.

Please see [Read Mode](#) and [Scroll Mode](#) topics for additional document navigation information using Read and Vertical Scroll viewing modes.

**Active Page:** With all viewing modes, the active page is indicated by the presence of a glow highlight behind the page. In Scroll modes, the active page changes to the previous or next page when the top or bottom edge passes through the midpoint of the viewing screen.

### 3.1.3 Page Selector Button

Available for all viewing modes, this button allows you to type in a page number to jump directly to a specified page in the document. To use this feature:

1. Click or double-click on the Page Selector Button  in the lower left portion of the Flash Viewer.
2. The button changes to an editable white field, displaying the current page number .
3. Highlight or double click the number to select.
4. Type in the desired page number and press <Enter>

### 3.1.4 Zoom Slider

Available for all viewing modes, you can use the viewer's zoom slider bar to zoom in and out of the document. Press on the slider button while dragging it right to increase magnification and left to decrease magnification. The current scale percentage displays above the scroll bar when the mouse button is pressed.

Alternatively, you can simply click on any point of the slider and the zoom button will automatically move to that magnification position:



### 3.1.5 Rotate Page

Use the rotate button  to independently rotate the currently active page counter-clockwise in 90-degree increments.

The rotation of all other pages remains unaffected, even in Double Page Vertical Scroll mode.

## 3.2 Scroll Modes

This mode provides classic desktop document behavior if you prefer to navigate using scroll bars and your mouse wheel.

You can select Vertical Scroll, or 2-page vertical scroll from the viewing options

### Scrolling

*Mouse Scroll on document* - Move the mouse wheel down to continuously scroll the document up the page and on to the next page, once it reaches the bottom of the current page. Move the mouse wheel up to continuously scroll the document down and back to the previous page once the top of the current page is reached.

*Page Scroll Bars* - The page scroll bars move you from the top and bottom of the current page only. Click and hold the horizontal or vertical scroll bar and drag it in the direction that you would like to move the current page. Single-click or click and hold the arrow at the ends of the scroll bars to move the document in line-by-line increments.

The active page is indicated by the presence of a drop shadow behind the document and changes to the previous or next page when the top or bottom edge passes through the midpoint of the viewing screen.

Note that when entering [Annotation](#) mode, the viewer will automatically switch to Scroll mode behavior.

## 3.3 Reader Mode

This mode provides more interactive behavior that follows your up and down mouse movements as you view. This type of behavior is common to hand-held mobile devices. Common gestures are understood in this mode, such as Swipe (to drag to next page), and Tap (to zoom).

Read mode is enabled when in [Thumbnail](#) mode.

## Mouse Controls

*Left Click* - a single click on the document toggles the view from fit width to full extents view.

*Mouse Movement on document* - When the document is at any zoom level (except full extents), move the mouse down slowly to read the document line by line (the document moves forward). Move the mouse up to scroll the document backwards. This behavior is similar to touch pad movement.

When the document is at full extents, you can left-click anywhere on the document and, while holding down the mouse button, drag the document in any direction. Release the mouse button to set the new position. Note that when you change the position, you also change the center point of the document and zooming in and out will be relative to that point.

## Paging Controls

If a document contains multiple pages, a page navigation bar is available on the left and right sides of Flash Viewer:



- Previous page* - double up arrow button jumps to the previous page in the document, mouse over shows a thumbnail preview.
- Previous section* - single up arrow button jumps to the previous section in the document - either the top of the currently viewed page, or the bottom of the previous page. A temporary blue line indicator is shown to visually reference the last viewed area.
- Next section* - single down arrow button jumps to the next section in the document - either the bottom of the currently viewed page, or the top of the next page. A temporary blue line indicator is shown to visually reference the last viewed area.
- Next page* - double down arrow button jumps to the next page in the document, mouse over shows a thumbnail preview.

## Page Bars

When the document page has reached the top or bottom limit, a next and previous page bar are available above and below the top and bottom margins of the document. Click anywhere on these bars to move to continue to the next or previous page.

*Previous Page Bar*



*Next Page Bar*



### 3.4 Preview Mode

Some integrations require a limited-feature preview mode of the Flash Viewer for highly constrained spaces. This optional "preview" attribute can be set in the viewer's configuration XML file (for *Config.Features.Viewmode*).

When set, the *Annotate*, *Review*, and *Info* tab on the top toolbar, as well as the *Thumbnail* and *View Mode* buttons on the bottom toolbar are all hidden.

### 3.5 Thumbnail Navigation

#### Thumbnail Control Button



Click the thumbnail control button to display a row of thumbnail images of the document that can be clicked on to jump to that page.

The thumbnail control changes to a return button . Use this button to exit thumbnail view.

#### Thumbnail Navigation

To use thumbnail navigation, mouse over the thumbnail pages to reveal the page number and left-click to select a page for viewing.

When a thumbnail is clicked, that page is presented in the top viewing area and the thumbnail is animated to the front most page in the row of thumbnail images. A total page count (page/number of pages in document) displays beneath the thumbnail. Thumbnails are displayed in groups of 20/40/40, etc. With large documents, each bundle of 40 thumbnail pages is represented as small circles beneath the thumbnail.



Click on the presented page to display it full size in [Read](#) mode. Double click on the thumbnail or click on  to return the page to extents.

## 4 Annotate

### 4.1 Annotation Overview

Annotations (also known as Markups) allow you to annotate documents without altering the document itself. All markup entities are saved in a markup file, which is associated and overlaid on the image for review by other users. A new markup layer is automatically created for each new markup file author (determined by the login user name), allowing them to review other author's markups, but not edit them.

The Changemarks note is an annotation entity that can contain vast amounts of text and can even be used as a discussion tool among multiple users. Users can reply to any other user's Changemarks comments and assign an available type and state (predefined, or customized) to their reply.

Markup files that were created in the ActiveX viewer can be selected and opened for review only in Flash, but not for edit.

#### 4.1.1 Server Annotations

If you are using annotations in a networking environment, you may need to adjust your browser settings so that the latest markup files are loaded from the server and not from your stale Internet cache.

To do this:

1. In Internet Explorer, go to **Tools->Internet Options**
2. On the *General* tab, in the *Browsing history* section, click **Settings**
3. In the *Temporary Internet Files* section, verify that "**Every time I visit the webpage**" is selected
4. Click OK to close through the dialogs

### 4.2 ActiveX Markups

Flash supports markups that are created with the ActiveX viewer with the following limitations outlined in this section.

Flash uses enhanced markup rendering that adds 3D graphic elements such as shadows and beveled edges. You can disable enhanced markups by deselecting the **Enhanced Rendering** check box of the display Settings dialog. When enhanced markup rendering is disabled, markup entities will appear similar to the style seen in the ActiveX viewer.

#### 4.2.1 Viewing ActiveX Markup Files

Flash viewer supports a limited subset of annotations created with ActiveX viewer. Supported entities can be opened for edit (if you are the author) or for review in Flash. Additional markups can be created and saved in Flash viewer as a new markup file, which can then be loaded in the ActiveX viewer, if desired.

**Supported annotations that can be authored include the following:**

- Changemarks Annotations
- Changemarks Discussion
- Changemarks Types and States
- Changemarks with Arrow
- Changemarks with Highlight
- Arrow Entities
- Crossout Entities
- Scratchout Entities
- Line Entities
- Highlight Entities
- Markup Text Entities (Arial font style only)
  - Text markups that are added to a page that was previously rotated by Active X viewer are NOT editable in Flash. Flash does not support editing rotated text.
- Markup Text Background

In addition to the markups listed above, the following list of markups created with ActiveX will be rendered with Flash. Note that dotted/dashed line style is only supported with Line and Arrow entities - otherwise the style will display as solid line:

- Polyline
- Arc
- Ellipse
- Polygon
- Cloud
- Raster
- Blockout (redaction)
- Stamp
- Arrowline

- Flash will ALWAYS convert a single-head arrow to a Byzantine (double-head) arrow type.

- Hyperlinks

- Creating hyperlinks is only supported with Flash when added to a Changemarks note's text. Launching of all hyperlinks is supported in Changemarks notes as long as they contain the prefix "http://". If you click on another author's markup entity (created with ActiveX viewer) that has an associated hyperlink, the Flash viewer will open a new tab/window to the

hyperlink location. Hyperlink detection in flash requires "http://" prefixing, whereas ActiveX just looks for "www." as the prefix.

The following ActiveX entities are not supported with Flash and a warning message will display when you load an ActiveX viewer markup file that contains any of these unsupported entities:

- Measure line
- Measure polyline
- Measure polygon
- Measure rectangle
- Measure circle
- Measure count

#### 4.2.2 Rendering of Flash vs. ActiveX Annotations

Please be aware that although the Flash viewer can render the supported annotations listed above, there are subtle differences in placement and rendering of those markup entities. If exact rendering is critical to your business workflow, then mixing Flash and ActiveX viewers across your client base is not recommended.

The following section catalogs the visual differences of the flash markup entities as compared to those of the ActiveX viewers:

**Highlights** and simple lines (including cross-outs) are nearly identical, although not pixel-perfect at the highest zoom setting on some document types.

**Arrows** have slightly different end caps and arrowhead dimensions.

**Squiggles** are drawn completely differently (ActiveX uses a fixed number of points, flash expands point count as needed).

**Text** is Arial only and line breaks may be in different places (although the text “area” should be nearly the same).

**Changemarks** have a different appearance (ActiveX uses a bitmap, flash uses vector).

Viewed in Flash:

The screenshot shows the ProjectDox Flash viewer interface. The document is titled "Uniform Residential Loan Application". A red box highlights the instruction: "This applicant must complete this form as 'Borrower' or 'Co-Borrower,' as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property or similar rights pursuant to applicable state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person who has community property or similar rights and the Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan." A red scribble is over the signature line. A yellow box labeled "Markup Text" is over the text "If this is an application for joint credit, Borrower and Co-Borrower each agree that we (sign below):". The form sections include "I. TYPE OF MORTGAGE AND TERMS OF LOAN" and "II. PROPERTY INFORMATION AND PURPOSE OF LOAN". A table in section I shows: Amount \$1,500,000, Interest Rate 6.25, No. of Months 30, Amortization Type: Fixed Rate, Agency Case Number 12345678, Lender Case Number 9876543. A blue scribble is over the table. A "Delete" button is visible over the table.

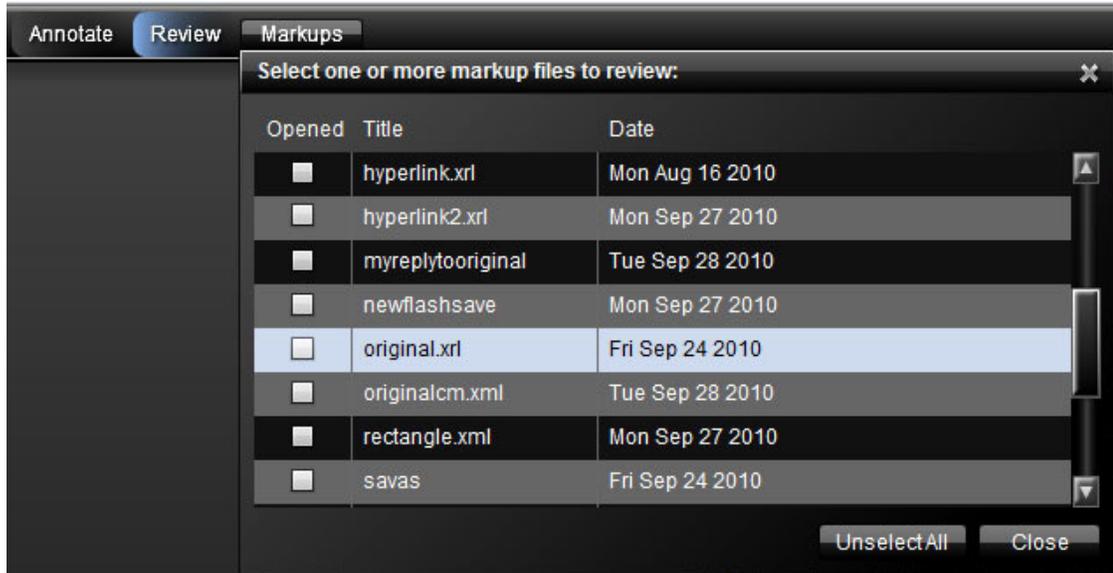
Viewed in ActiveX:

The screenshot shows the ProjectDox ActiveX viewer interface. The document is titled "Uniform Residential Loan Application". A red box highlights the instruction: "This applicant must complete this form as 'Borrower' or 'Co-Borrower,' as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property or similar rights pursuant to applicable state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person who has community property or similar rights and the Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan." A red scribble is over the signature line. A yellow box labeled "Markup Text" is over the text "If this is an application for joint credit, Borrower and Co-Borrower each agree that we (sign below):". The form sections include "I. TYPE OF MORTGAGE AND TERMS OF LOAN" and "II. PROPERTY INFORMATION AND PURPOSE OF LOAN". A table in section I shows: Amount \$1,500,000, Interest Rate 6.25, No. of Months 30, Amortization Type: Fixed Rate, Agency Case Number 12345678, Lender Case Number 9876543. A blue scribble is over the table.

## 5 Review Annotations

Review mode allows you to open for review any markup files (XRL) that are associated with the document you are currently viewing.

1. Click the *Review* button  to enter Annotation Review mode.
2. Clicking on  displays a selectable list of markup files associated with the current document, if any are found. The list can be sorted by the column headings *Title* and *Date*. The up/down arrow in the column heading indicates the current order (ascending or descending) which can be toggled by clicking again on the column heading.
3. Select the *Opened* check boxes for the markup files you wish to open for review. Selecting any of the check boxes immediately loads that markup file while deselecting a check box will close that file. You can use the **Unselect All** buttons to close all of the currently loaded markups.
4. Click **Close** to close the markup review dialog. Upon closing this dialog, if any of the open markups contain Changemarks, the first Changemarks note on the document is presented for review, allowing for convenient navigation to consecutive Changemarks (see Annotation Pages below).



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

live in the original markup file if the user has replied while in edit mode and one Changemarks note can contain multiple replies from multiple authors.

## 5.1 Annotation Pages

You can navigate annotations (markup entities and Changemarks) in the document by using the Next and Previous annotation page buttons. Only pages containing annotations are presented as next and previous pages.

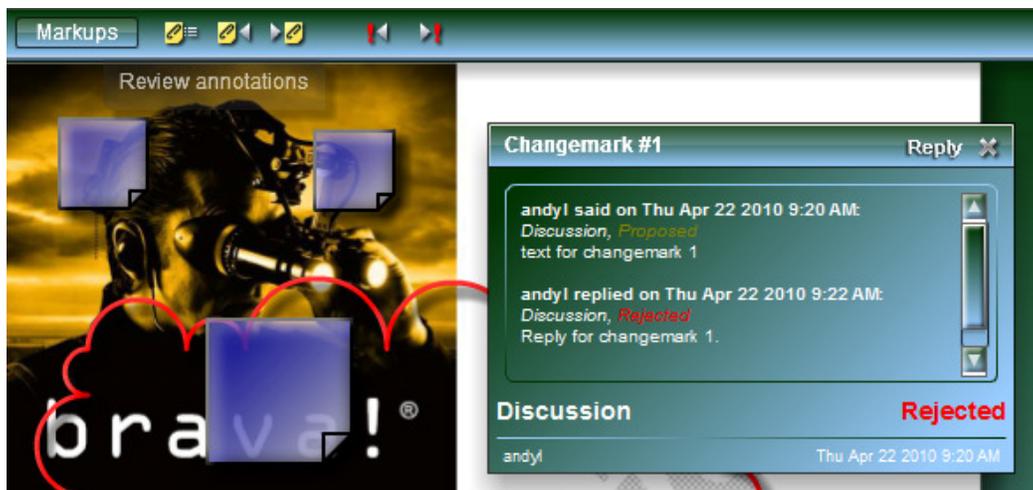


If a markup file contains Changemarks note entities, the Next and Previous Changemarks buttons display in the toolbar. These buttons navigate through the Changemarks first by page order, then by creation date.



Clicking on these buttons reveals the Changemarks content and information in a pop-up dialog.

You can also view the content dialog for each Changemarks note by clicking on the individual entities.



## 5.2 Changemarks List

Clicking on the Changemarks List button  allows you to view a list of details for all Changemarks open in the current document, including Title, Author, and Date created information.

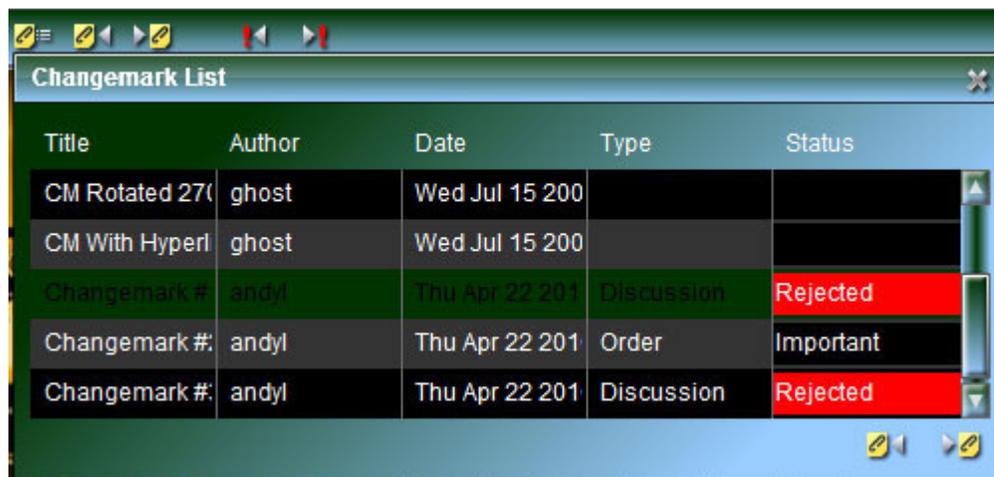
When the Changemarks note is part of a Changemarks Discussion, the current Type and State of the discussion displays in the *Type* and *Status* fields. Note that if a Changemarks

discussion exists, you must have opened for review all markup files containing replies from various authors (if replies have been submitted to a markup that was open for review) to view the entire discussion. One discussion Changemarks can contain many replies from multiple authors if they were added in edit mode.

Note that if you click on a Changemarks note that only contains reply data (because a user had replied in review mode), the Changemarks note will appear to be blank. You must select the original Changemarks note that contains the discussion and all associated replies that exist in the currently overlaid markup files will display in the Changemarks dialog.

From the Changemarks List, you can select individual Changemarks to view their content, or you can use the two *Next* and *Previous* navigation buttons at the bottom of the dialog to sequentially step through each comment as they appear in the list.

The list can be sorted by the column headings: Title, Author, Date, Type, and Status. The up/down arrow in the column heading indicates the current order (ascending or descending) which can be toggled by clicking again on the column heading.



Title	Author	Date	Type	Status
CM Rotated 270	ghost	Wed Jul 15 200		
CM With Hyperl	ghost	Wed Jul 15 200		
Changemark #:	andyl	Thu Apr 22 201	Discussion	Rejected
Changemark #:	andyl	Thu Apr 22 201	Order	Important
Changemark #:	andyl	Thu Apr 22 201	Discussion	Rejected

## 6 Search

### 6.1 Text Search

Use the text search button **Find** to find and highlight searchable text phrases within the currently viewed document.



1. You can perform a quick search, or use a preset list for your search itinerary:

**Quick search:** Enter a phrase to search for and hit <Enter> or click the find icon



**Advanced Search:** You can optionally turn on or off the Whole word, and Case sensitive options, or choose to search from a preset list. Click the drop down arrow to show the advanced options:

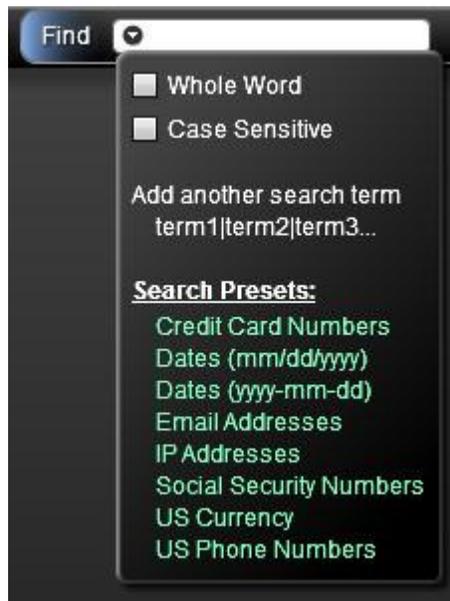
**Case sensitive** - if you would like the search to find text exactly as it is typed in with upper and lower case characters

**Whole word** - if you would like to find the typed string as an entire word as opposed to characters that are part of a longer word. Example, "search" finds only instances of "search" and ignores "research", "searches", etc.

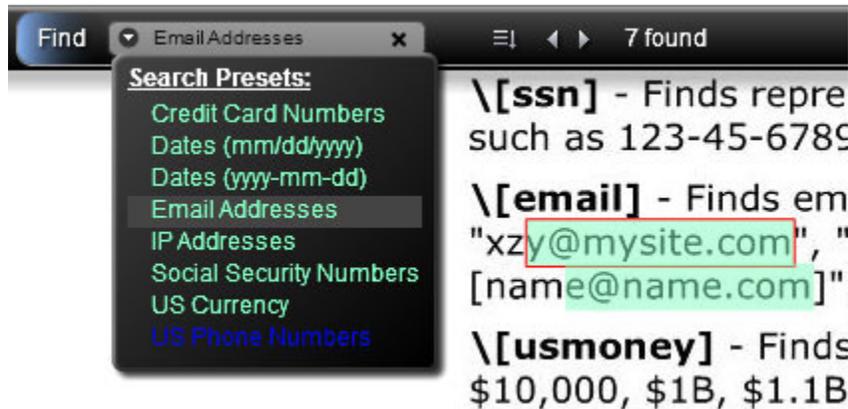
**Search Presets:**

This option is used by integrators and is controlled/defined by the server administrator. Administrators can edit the provided XML file to specify a completely customized predefined list of search terms and color choice for each category's search result.

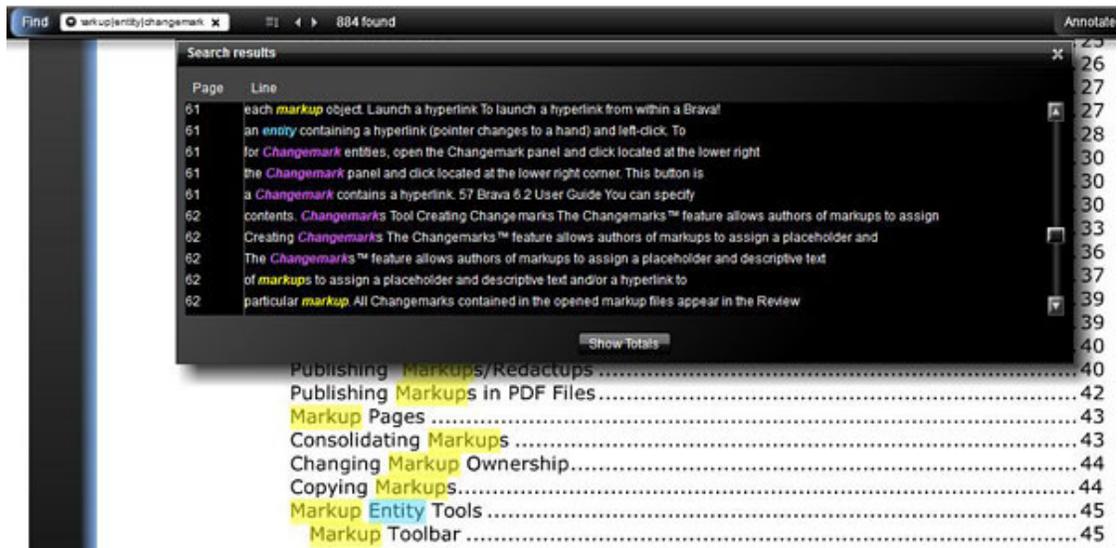
The default installation provides a predefined list that will allow you to search for one of the following per search query: Credit Card Numbers, Dates, Email Addresses, IP Addresses, Social Security Numbers, US Currency, and US Phone numbers.



Selecting an item from the list immediately runs the search macro against the current file. Once you have executed a search from the preset list, the *Case sensitive* and *Whole word*, and *Add another search term* options are not available for selection as these options are not valid for preset searches.



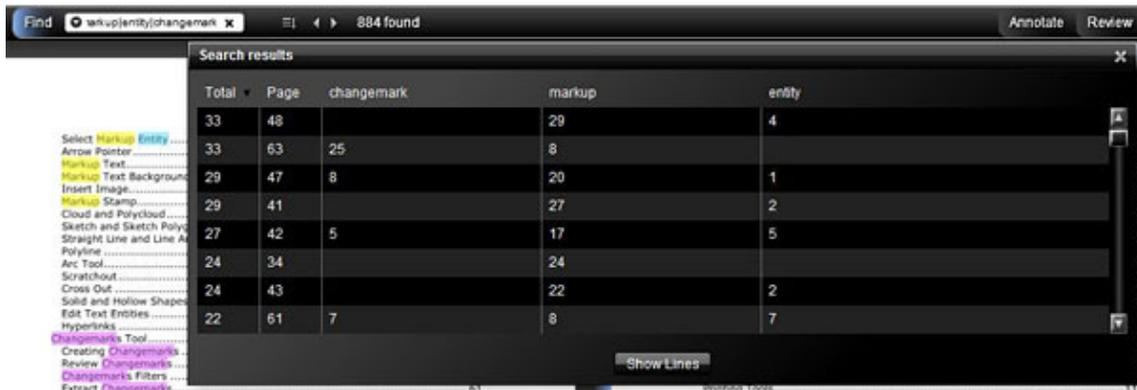
- The results can now be seen in the document color-highlighted, with the first instance marked with a red border. A Search Results dialog displays each line and page number of the resulting instances. Clicking on a results line takes you to that particular instance, highlighted with a red border.



The window becomes transparent; it can be returned to opaque state by moving your mouse off and then hovering back over the search results window.

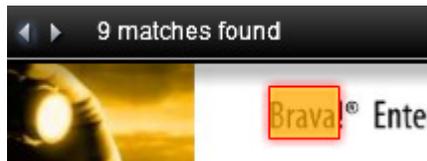
You can close the dialog with the **X** in the upper right corner. View the dialog at any time by clicking the **Show search lines**  button in the top toolbar.

- From this dialog, you can review search results totals in table format by clicking the **Show Totals** button. The columns can be sorted by search term, by *Page* number, or by *Total* number of hits for a single page (click on the column heading to sort by). Clicking twice toggles ascending/descending order:



The initial view of search totals automatically sorts descending by *Total* hits column.

- The **Find previous** and **Find next** button arrows  allow you to navigate through the search results, zooming to the next or previous result instance. The page displays at fit width while navigating and the current search result instance displays a red border around the highlight.



- You can click the **Clear search** button  in the search term text field at any time to remove the current search result highlights and then enter another search term if you wish. Note that if you have not cleared your search results, the highlights remain visible on the document until you click the Clear search button.
- At any time during a session, you can left-click in the *Find* field to display a selectable list of the last 10 recently found search terms. This list is persisted until the current document is closed. Search terms that were entered, but not found, do not display in this list. Selecting a term from the list immediately re-searches the document.



## 6.2 Multi-Term Searching

When [text searching](#) with Brava! Flash viewer, you can enter a pipe-separated list of multiple search terms to be returned in your search results.

To enter multiple terms, insert a pipe character "|" between each word. For example, "Bob|Anne|Karen". You can enter as many terms as you wish, and then hit <Enter>.

Note that it is possible to include the pipe character itself as a search term by entering the search string with an escape character (\) such as "Bob\\Anne" if you want to specifically search for "Bob|Ann", for example.

You can simply click the "**Add another search term**" option to have the system insert a pipe separator for you, between each search term added.



### 6.2.1 Multi-Color Highlighting

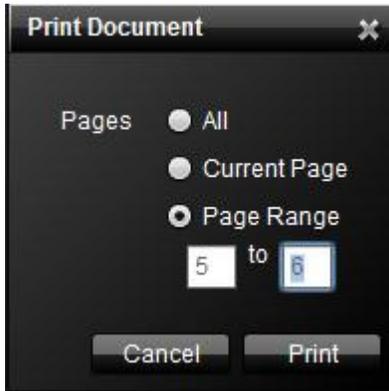
Brava Flash will search and highlight each found instance of each term and display the results in up to 6 different colors. If 6 or less of the terms are found in the document, each term will be highlighted in a different color. If more than 6 terms are searched and found, then these same 6 colors will cycle, meaning the first and the 7th term will be highlighted the same color, as will the 2nd and 8th, etc.

To step through the results, use the next and previous result arrows. The current result displays a red border and navigation through the results is by order appearing in the document.



## 7 Printing Options

The Print button is available at the top left corner of Brava Flash .



Click the print icon to expose the printing dialog. The print dialog can also be accessed through the right mouse button menu command *Print Document*.

From the *Print* dialog, you may select your printing options. These options include settings for *Pages*:

Select either to print **All** pages, the **Current Page**, or to print from a specified **Page Range**. If using *Page Range*, enter page numbers as smaller number in the left text field and larger number in the right text field.

Click the **Print** button at the bottom of the dialog to send the specified printing job to the printer defined in the Print options. All required pages will be downloaded to print a document.

Note that page rotation is ignored when printing.

Click **Cancel**, the **X** in the upper right corner, or click anywhere outside of the Print dialog to close the dialog and return to View or Read mode without printing the current document.



When printing multi-page documents (only), printing with vector graphics is used instead of bitmap graphics to avoid timeout issues. If the file contains transparent markup entities, these entities will lose their transparency and print opaque.

## 8 Select/Copy Text



The **Copy text region to clipboard** tool allows you to highlight an area and select (for copy/paste) any underlying text.

1. Click the *Copy text region to clipboard* button and draw a rectangle around the area of text that you would like to select. Any images that are included in your select rectangle are not captured in the selection results.



2. The selected text displays in the *Selected Text* dialog. You can optionally use the **Merge Lines** button to remove the hard returns that are present when the text is first shown in the Selected Text dialog. The text can be further edited as desired. Use the **Copy to Clipboard** button to copy the original or edited text to the clipboard for pasting into another application, such as Notepad or Microsoft Word.



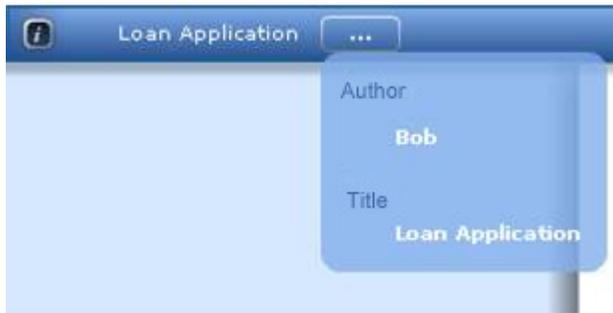
## 9 Additional Information

### Additional file, product, and contact information

At any time, you may click the **document information** button at the top left corner of the window  to view the URL or title of the current document.

 [http://wolfwood.int.infograph.com:8081/GC/Samples/brava\\_enterprise.pdf](http://wolfwood.int.infograph.com:8081/GC/Samples/brava_enterprise.pdf)

When the Flash viewer is used in ProjectDox, the information bar will reveal the document title and data that is available from the integration document database. Click the “...” button to view the document data.



The **Help** button  launches the online help file, similar to this document.

You can click the IGC icon in the upper-right corner  to visit the Informative Graphics website for information about this and other viewing, publishing, annotation, and redaction software.