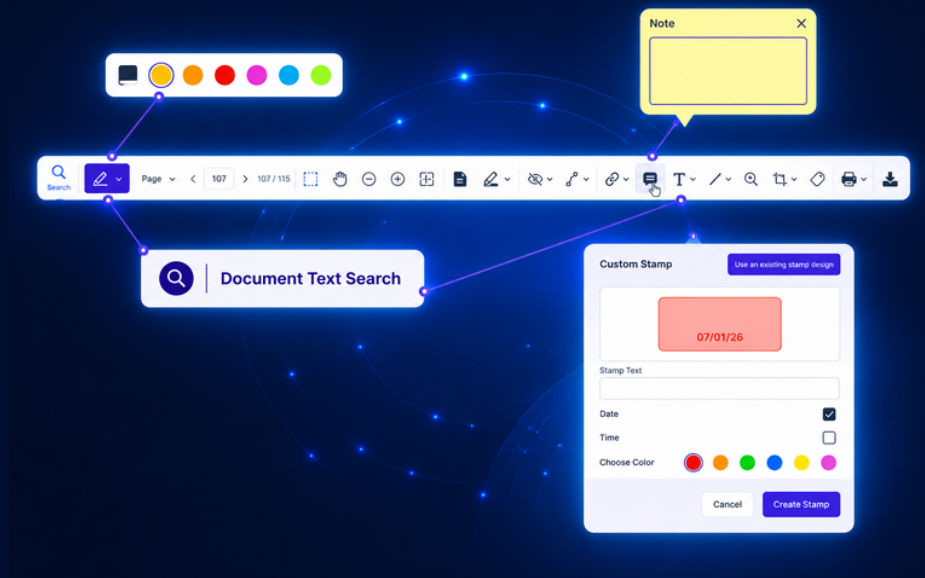


UPDATED EXPERIENCE

Etrieve Content Viewer

*Sidebar, Toolbar, and
Text Selection Options Guide*



Guide Description

Use this guide as a quick reference to the tools available in the new Etrieve Content Viewer. It explains how users can open and navigate the sidebar, move through and adjust the document view, apply annotations and redactions, clean up images, make document edits, and complete document-level actions. It also describes the annotation customization options that appear after markup is added or selected, so users know where to adjust appearance, behavior, and other available properties.

Available toolbar options may vary based on the user's permissions, the file type, and the current state of the document. If an action is not available for a specific user or document, it may not appear in the viewer.

The sections are organized to match the current order in which these options appear in the viewer. Because the viewer layout and toolbar organization may change over time, use this order as a reflection of the current experience rather than a fixed or permanent structure.

OUTLINE

- 1 SIDEBAR** | How to show or hide the sidebar and use sidebar panels to understand or move through the document.
- 2 VIEWING AND NAVIGATION** | Tools for paging, zooming, fitting, and changing how the document is displayed.
- 3 REDACTIONS AND ANNOTATIONS** | Main toolbar tools for adding review markup, including redactions and visual annotations.
- 4 TEXT SELECTION TOOLBAR** | Inline actions that appear when selectable document text is highlighted.
- 5 ANNOTATION CUSTOMIZATION** | Options that appear after selecting an annotation, such as style, color, opacity, line, text, and other property controls.
- 6 IMAGE CLEANING** | Tools for improving scanned document readability and image quality.
- 7 DOCUMENT EDITING** | Tools for changing document pages or page content before saving or completing work.
- 8 DOCUMENT ACTIONS** | Final document-level actions such as downloading, printing, sending, or completing the document workflow.

VIEWER PANELS

1 SIDEBAR

The Sidebar option allows users to show or hide the viewer sidebar. The sidebar provides access to supporting panels that help users review document information, move through the document, or work with available document tools.

Feature	What it does	When to use it
Page Thumbnails	Shows miniature previews of the document's pages, making it easy to jump to another page or quickly understand the document's layout.	When navigating large documents.
Outline	Shows the document's outline or table-of-contents structure, when one is available.	Navigate between major sections of a structured PDF.
Annotations	Lists all annotations in the document (except link annotations), who created them and when, grouped by page. Selecting an annotation takes you directly to it.	Review comments, highlights, markups, and other annotations without searching page by page.
Bookmarks *The Bookmarks panel is on the roadmap — its target delivery date is 9/5/26.	Shows bookmarks included in the document and lets you navigate to their bookmarked pages.	Move quickly between sections that have been bookmarked.
Signatures	Lists electronic signatures when available.	Check completed signatures and jump to signature locations.
Layers	Displays PDF layers when the document contains optional content layers and the feature is enabled.	View or work with documents that contain optional content layers (i.e. engineering and architecture documents).

2 VIEWING AND NAVIGATION

Viewing and navigation tools help users move through the document and adjust how it appears in the viewer.

Feature	What it does	When to use it
Search	Searches for text within the document.	Find a name, word, phrase, or other text on documents with a text layer without manually scanning pages.
Page Navigation	Moves between pages and can display the current page and page count.	Move forward or backward or jump to a known page.
Zoom In/Out	Increases or decreases the document's magnification.	Zoom in to read small text or inspect details; zoom out to see more of the page at once.
Fit to Width/ Fit to Page	Changes how the document is fitted or viewed.	Choose a viewing scale that works best for the task.
Redaction Toggle	Allows authorized users to temporarily view a document without its redactions applied.	Check what's underneath a redaction or confirm redactions are correctly hiding sensitive information before sharing.
Annotation Toggle	Temporarily hides all annotations on the document in view.	View a clean, uncluttered view of the document.

MARKUP TOOLS

3 REDACTIONS AND ANNOTATIONS

Redaction and annotation tools allow users to mark up the document during review. Redactions are used to permanently cover or remove sensitive information, while annotations are used to call attention to specific content, add visual markup, or support review workflows.

Feature	What it does	When to use it
Add Redaction: Text	Permanently hides sensitive content by selecting text to redact on documents with a text layer.	Redact exact words or values (like a SSN or name) when the document has a text layer.
Add Redaction: Area	Permanently hides sensitive content by drawing a box over the area you want to redact.	Redact images, signatures, or non-text content in scanned documents without a text layer.
Ink: Drawing	Draws freehand marks on the page.	Handwrite, circle, mark, or sketch directly on a document.
Ink: Freeform Highlight	Highlights freehand marks on the page.	Emphasize content in scanned documents, images, or irregular areas where text selection isn't available.
Ink: Eraser	Erases portions of freehand ink annotations.	Correct or remove part of a freehand mark.
Elements: Image	Adds an image to the document.	Insert a picture, graphic, or other image content.
Elements: Stamp *Ability to save and re-use custom stamps will be delivered in an upcoming feature.	Places a predefined or custom stamp on the document.	Apply standardized or custom labels such as review or approval stamps.
Link	Creates a clickable area that takes you to another page in the document or to a website.	Provide quick navigation to related information or external resources.
Note	Adds a note associated with a location in the document.	Ask a question, provide feedback, or leave a review note.

REDACTIONS AND ANNOTATIONS (CONTINUED)

Feature	What it does	When to use it
Text Tools: Text	Places text directly on the page.	Add visible labels, instructions, or other text.
Text Tools: Callout	Adds text with a pointer that connects the text to a specific area of the document.	Add an explanation or note while clearly identifying what part of the document it refers to.
Shapes: Line	Draws a straight line.	Separate content or point out an area.
Shapes: Arrow	Draws a line with an arrowhead.	Direct attention to a specific item.
Shapes: Rectangle	Draws a rectangular shape.	Outline an area or add a visual markup.
Shapes: Ellipse	Draws an oval or circle.	Circle or outline an area.
Shapes: Polygon	Draws a closed shape with multiple sides.	Mark irregular areas with straight edges.
Shapes: Cloudy Polygon	Creates cloud-style outlines around an area.	Call attention to content during review.
Shapes: Polyline	Draws connected line segments.	Create an open, multi-segment line.

4 TEXT SELECTION TOOLBAR

When a document contains selectable text, users can highlight text directly in the document to access inline annotation options. This allows users to quickly apply text-based markup without first selecting a tool from the main toolbar.

Feature	What it does	When to use it
Highlight	Highlights selected text.	Emphasize important information.
Strikeout	Marks selected text with a strike-through.	Indicate text that should be removed or disregarded during review.
Underline	Underlines selected text.	Emphasize text without applying a filled highlight.
Squiggle	Adds a wavy underline to selected text.	Flag text that may need attention or correction.

5 ANNOTATION CUSTOMIZATION

After a user adds or selects an annotation, additional customization options may appear. These options allow users to adjust the properties of the selected annotation, depending on the annotation type.

Property	What it does
Color	Changes the annotation's color.
Fill Color	Changes the interior color of supported shapes.
Border / Line Color	Changes the outline or line color of supported annotations.
Line Width	Changes the thickness of supported lines and borders.
Opacity	Controls how transparent the annotation appears.
Font	Changes the font used by supported text annotations.
Font Size	Changes the size of supported annotation text.
Line Style	Changes the style of supported lines, such as solid or dashed.
Overlay Text	Adds text that appears over the redacted area after the redaction is applied (i.e. Confidential or Redacted)

6 IMAGE CLEANING

Image cleaning tools help users improve the readability or quality of scanned document images so it is easier to review.

Feature	What it does	When to use it
Brightness/Contrast	Adjusts how light or dark the image appears and the difference between light and dark areas.	Improve readability of scans that came out too dark, faded, or washed out.
Crop	Trims away unwanted areas of the page.	Remove black borders, scanner artifacts, or blank margins so the content fills the view.
Auto-Deskew	Automatically straightens pages that were scanned at an angle.	Fix crooked scans so text lines up horizontally and is easier to read.
Invert Colors	Reverses the light and dark values in the document image.	Make documents with dark backgrounds or light text easier to read.

7 DOCUMENT EDITING

Document editing tools allow users to make changes to the document or its pages. These options may include page-level edits, structural changes, or other tools that modify the document content.

Feature	What it does	When to use it
Delete Pages	Removes one or more pages from the document. <i>*Note, you cannot delete all pages from a document so this option is disabled on 1-page documents or when all pages are selected.</i>	Remove blank pages, duplicates, or pages that don't belong in the document.
Rotate Left/Right	Turns the page 90 degrees.	Fix a page that's sideways or upside down.
Move/Move Before/Move After	Moves the selected page or pages to a different location within the document, before or after another page, or to a specific page number. (*Note, pages can also be reordered via drag and drop.)	Reorder pages that are out of sequence or need to be grouped differently.
Split	Moves selected pages out of the document and into a new, separate document.	Separate pages that don't belong in the current document (like two forms scanned together) while keeping the remaining pages in the original.
Copy	Copies selected pages into a new, separate document while leaving the original unchanged.	Create a new document from pages in an existing one when you need the pages in both places — like copying a signed consent form into a compliance packet while keeping it in the student's file.
Add Pages	Uploads pages from a file on your computer and adds it to the end of the document.	Append an existing file (like a PDF or image) into the current document.
Add Pages via Scan	Scans pages directly onto the end of the document from a connected scanner.	Add paper documents without needing to scan and upload them separately.

8 DOCUMENT ACTIONS

Document actions are options that apply to the document as a whole or support completion of the user's workflow.

Feature	What it does	When to use it
Share	Lets you copy a direct link to the document or send it via email	Whenever you need to quickly give a colleague access to the specific document you're viewing.
Print / Print Related Documents	Opens the document's printing workflow. If "Print Related" is selected, linked related documents will be included.	Create a paper copy or send the document to a configured printer.
Download	Downloads a copy of the document	Save a copy for use outside the viewer.
Recycle	Sends the document in view to the Recycle Bin	Remove a document you no longer need.
Restore	Returns a recycled document to its original location and removes it from the recycle bin.	Recover a document that was sent to the Recycle Bin by mistake or is needed again.
Permanently Delete	Permanently deletes a recycled document with no way to recover it.	Delete a document you're certain is no longer needed, like when cleaning out the Recycle Bin or purging records per a retention policy.