

Banner Document Management (BDM)

How to Annotate Documents

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Overview

An **Annotation** is a note or a shape added to a page by a BDM user, typically to focus attention on a particular part of the page. When you create an annotation, it is associated with the page or document on which you created it. Annotations can be in the form of lines, arrows, highlights, shapes or text.

A **Redaction** is a special form of annotation. It is a filled shape which opaque. Redactions are commonly used to hide sensitive data and information on a page (i.e. Social Insurance Number).

Only users who have appropriate privileges can create, modify, move, hide, or delete annotations and redactions.

Adding Annotations

To add annotations to a document or page the user must first open the document for viewing in Web Access. Please refer to the document “How to Query, View and Print Documents” for instructions on locating and opening documents.

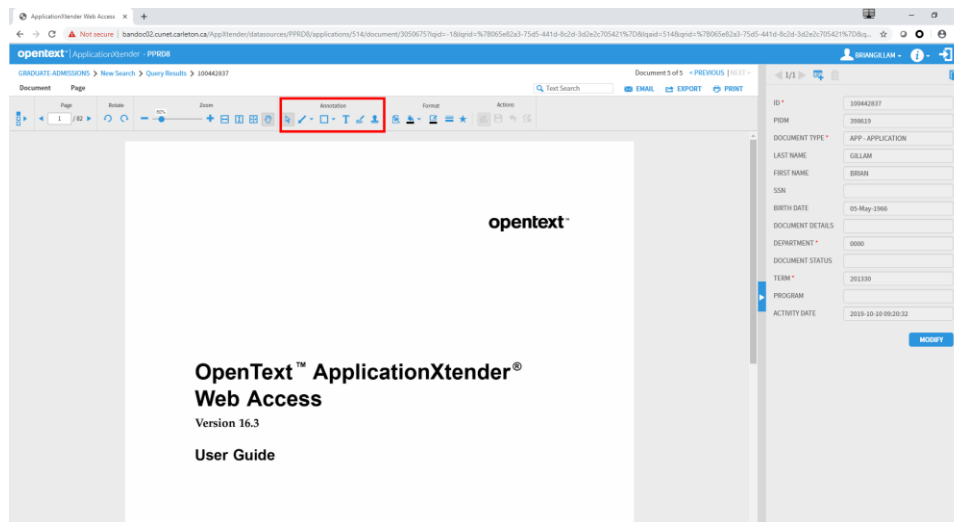
Once the document is open for viewing in the Document View follow these basic steps:

Step 1 - From the Annotation Toolbar select the type of annotation you would like to use by clicking the appropriate button in the toolbar. Mouse over a button to display a tooltip.

Available annotation types are:

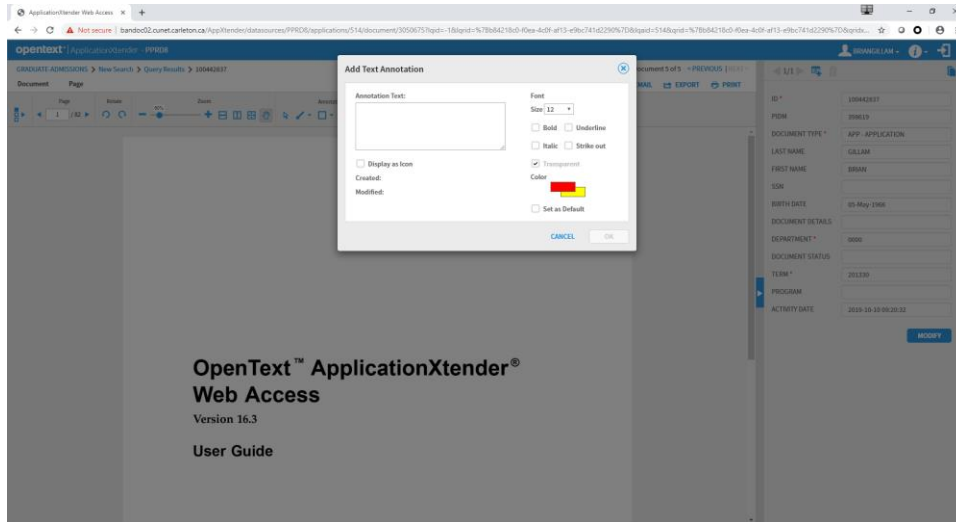
Arrows & Lines, Shapes, Text, Highlighter, Rubber Stamp

Once you have selected the type you want to use simply click the document page at the point where you want to apply the annotation and use the mouse to draw the line, shape or highlight. A Text annotation only requires you to click the page.

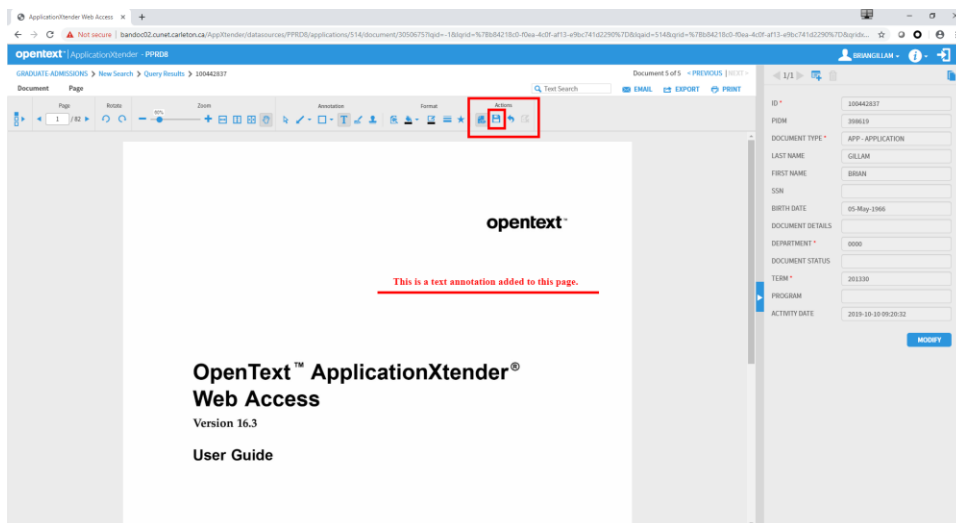


Step 2 – if you are applying a Text annotation an Add Text Annotation window will open. Enter the Annotation Text in the field provided. You can adjust font settings and colors to taste.

When complete click OK and the text annotation will be applied to the page at the point where you clicked the page. The annotation can be moved by clicking on the SELECT button in the Annotation Toolbar and then clicking on the annotation and dragging it.



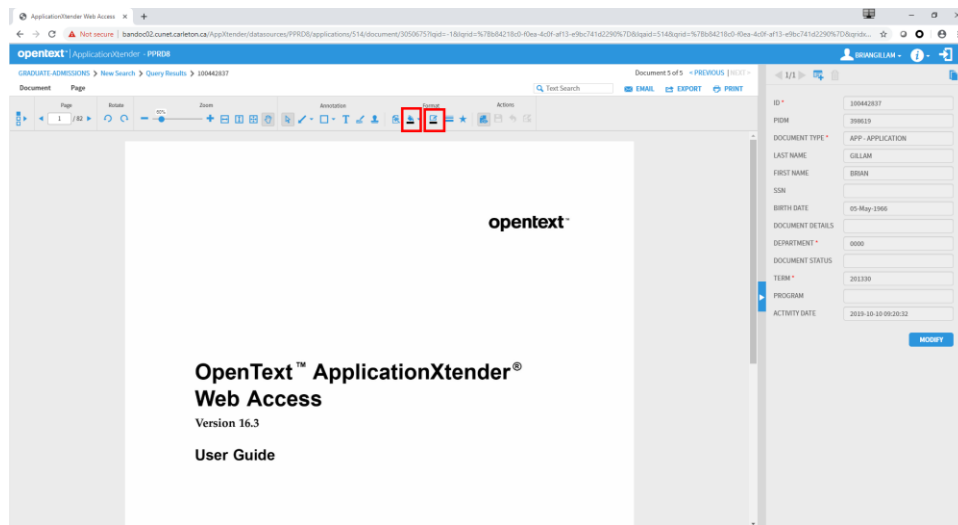
Step 3 – click the SAVE button in the Action toolbar. The changes will be saved and you will remain in the Document View to conduct further work with the document.



Adding Redactions

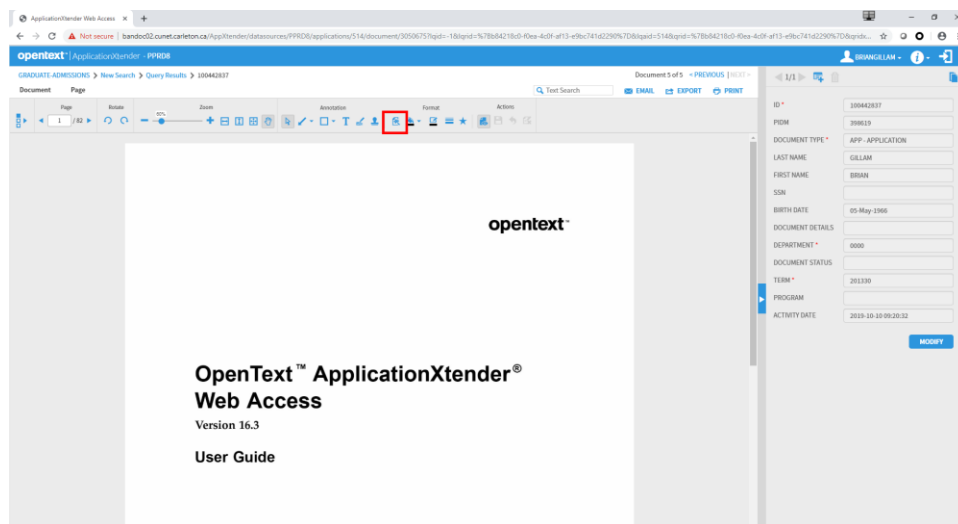
A redaction is simply an annotation shape (i.e. a rectangle) that is drawn with a solid, dark fill color (black) and is made to be opaque. Applying a redaction follows the same steps as applying an annotation shape.

Step 1 – on the Format menu click the Line Color button and set it to black. Click the Fill button and set it to black.

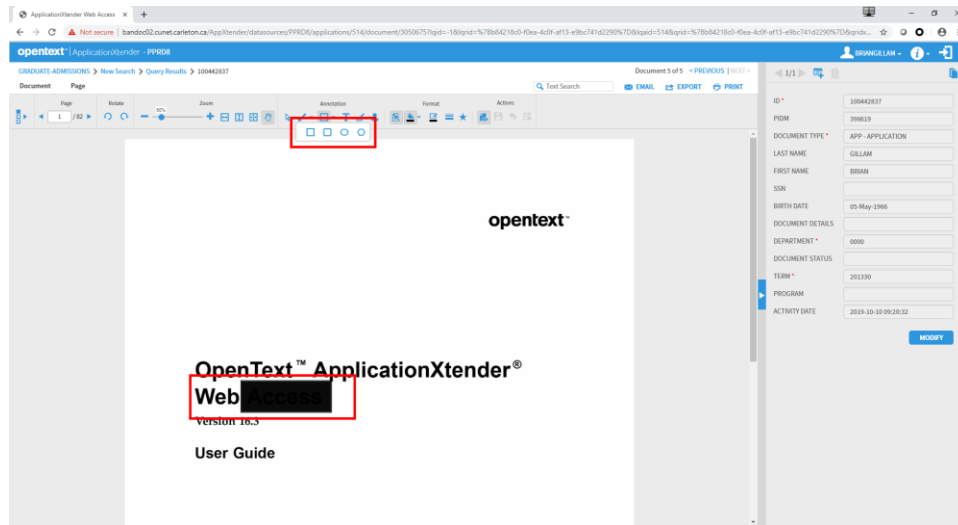


Step 2 – on the Format menu click the Redaction button.

Note – to make a redaction the Fill and Redaction buttons must be clicked, and set, prior to choosing the annotation shape.



Step 3 – on the Annotation toolbar click the Shape button and choose rectangle. Move your mouse to the text area on the page that you wish to redact over and draw the redaction over the text.



Notes:

- Redactions are not fully supported on PDFs. You can apply them but they do not get embedded into the document so they may not appear when a document is being exported or printed.
- You may need to apply a double redaction on a PDF. It has been noted that one black filled shape does not always act 100% opaque. Applying a second on top of it seems to work.
- Users that do not have annotation/redaction privileges will not have the ability to remove or move them.