

**Banner Document Management
(BDM)**

How to Annotate Documents in BDM

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1. 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 batch 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 shape which is filled and opaque. It is commonly used to hide sensitive data and information on a page or document (i.e. Social Insurance Number).

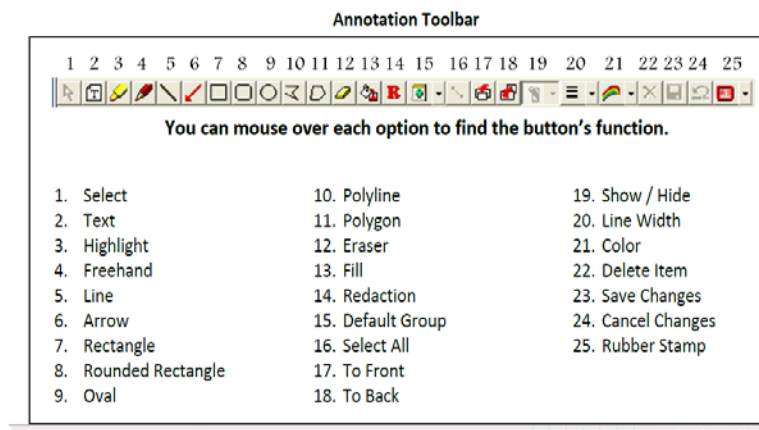
Only users who have appropriate privileges can create, modify, move, hide, or delete annotations and redactions. These privileges are determined by the functional owner(s) of the documents and processes the documents apply to and implemented by the BDM Administrator.

2. Adding Annotations

To add annotations to a document or page the user must first open the document for viewing in WebXtender. Please refer to the document "How to Query, View and Print Documents in BDM".

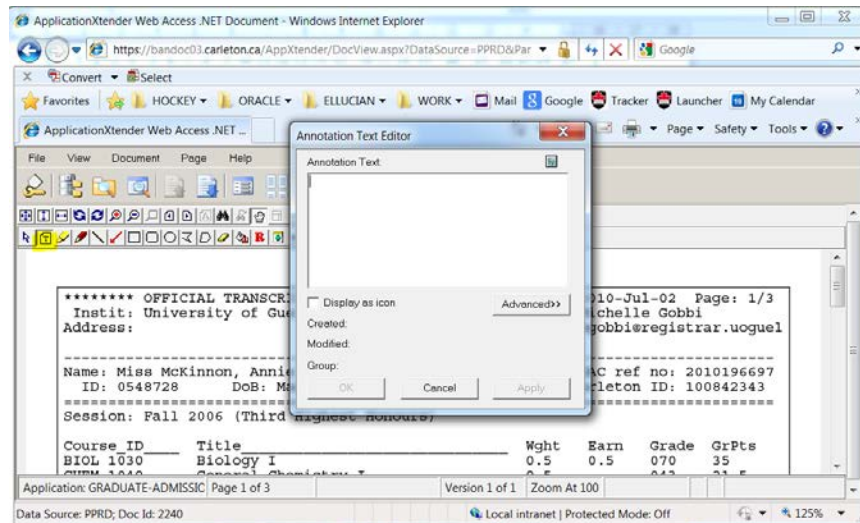
Once the document is open for viewing in the Interactive Viewer follow these basic steps:

1. From the Annotation Toolbar select the type of annotation you would like to use by clicking the appropriate button in the toolbar.



2. Move your mouse to the point on the page where you wish to apply the annotation and click the location or click and draw with the mouse.

Note - if you have selected the Text annotation then a single click on the document will open the text entry tool. You can enter the text you wish to display in the annotation and modify the font, size, style, etc.



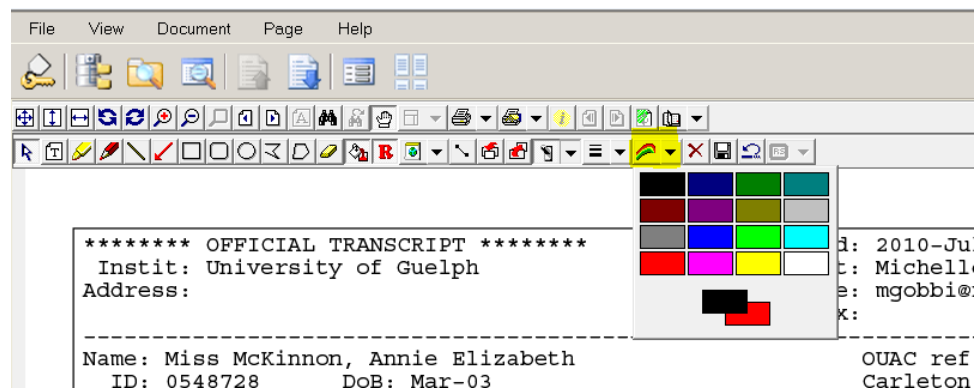
3. Once you have completed making the annotation click the Save Changes button in the annotation toolbar. You will be prompted to confirm the saving of the changes.

Note – if you do not click save changes and instead attempt to close the document or move out of the Interactive Viewer WebXtender will prompt you that changes were made and ask you to confirm them.

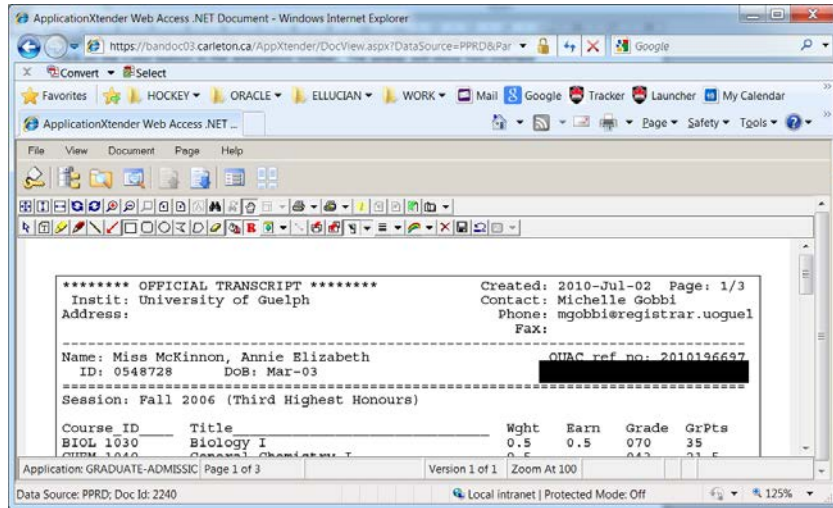
3. Adding Redactions

1. With the document open in the Interactive Viewer click on the Redaction button in the Annotation Toolbar (see illustration above).
2. Click on the Fill button in the Annotation Toolbar. This will ensure that when you draw the redaction shape it will fill in with an opaque color and hide the information being redacted.

Note – to change the color of the redaction shape you draw (border and/or fill color) click on the Color button in the annotation toolbar. The popup will show two overlaid colors. The top color is the border color and the bottom color is the fill. To change these colors you must click on one of them first and then select the color from the palette.



3. Select the shape you wish to draw to redact the information on the document. The most common redaction shape is the rectangle.
4. Use your mouse to draw the shape over the information that you wish to hide on the document. The redaction shape you selected will be created and filled with color to hide the area drawn over.



5. On the Annotation Toolbar click the Save button to save the redaction.

Known Issues:

- Adding redactions to PDF documents in WebXtender is a known issue. In PDFs the redaction will not always “embed” and become a part of the PDF. Therefore there is always a risk that when printing or exporting the PDF document the redactions will not be generated.