# Epicor ECM (DocStar) - Annotations

Epicor ECM (DocStar) offers a suite of annotation tools that you can use to mark up your documents.

In this course, we’ll look at various annotation tools, including Highlights, Sticky Notes, Arrows, Lines, and Shapes, Redaction, and both Text and Image Stamps.

We’ll also see that you can search for items based on text in their annotations.

Objectives

* Annotation Tools
* Redactions
* Text and Image Stamps
* Search by Annotation Text

Annotation Tools

First, we’ll look at some basic annotation tools. When you’re viewing a document, you’ll find all of them in the toolbar located above the document. We’ll start with the highlighter.

From the toolbar, select the Highlighter icon. When you select a tool, the tool’s options display. This is a simple tool, with just one option – the color. We’ll stick with a traditional yellow highlighter, then click in the document image and drag to draw the highlight. You can manipulate the dimensions too.

Now you need to click Save. You’ll see the Burning In message. But this is not completely permanent – Epicor ECM (Docstar) preserves the original, unedited document. On the toolbar, you can select the toggle button to Hide or Show Annotations.

To delete an annotation, select the tool type you want to delete. This activates annotation edit mode. Select the item and press Delete, or select Delete from the toolbar. And remember to Save your changes.

The Sticky Note combines a background and border with some text. Select the Fill color, Border color and Border Width, Font style and size, then click on the document and drag and draw the note area. Then you enter the text that will display on the sticky note. Select OK. Very nice. Just remember to Save it.

Next, we’ll draw an arrow to point at the price we mentioned on the sticky note. For both lines and arrows, you can select the color and the line width. You can also draw shapes – rectangles or ellipses. Again, you can select the color and the line width, then drag and draw on the document.

Redactions

If you need to censor sensitive information on a document, you can use the redaction tool to block it out with a black bar. Click and drag to draw in the redaction. Click Save to burn it in.

Now, it’s important to understand that, even if you cover some information on the document image, if that information is in the Content Fields, that metadata will still be visible. Save your redactions.

Text and Image Stamps

Stamps are specific to your individual instance of Epicor ECM (DocStar). What this means is that the stamps already have to exist – and be available to the user – in order to place them in your documents.

The stamps available to users or user groups can be managed by an administrator. On the Admin page, the Stamps option lists all the current stamps available to this user, both text and image stamps.

To add a text stamp to your document, select the Text Rubberstamp tool, choose the specific text stamp you want to use, then click to place it in the document. While you’re still in edit mode, you can drag it elsewhere, and resize it. Click Save.

Image stamps work in much the same way. Select the Image Rubberstamp tool, choose the image, then click to place it in the document. Again, if need be, you can move it around and resize it. Save your changes.

Search by Annotation Text

Annotation text is retrievable. This means that you can search for documents in Epicor ECM (DocStar) by text found in annotations.

Let’s add an annotation to this multi-page document with the text “bogus price”.

Now, if we enter the term “bogus” in the standard search field, the system finds any instances of that term in a document. In this case, there’s just the one.

What’s more, when you open this document in the viewer, go to Actions > Show > Hits. The system automatically takes you to the page where that search text displays, and highlights it. Pretty useful, huh?

Recap

In this course, we’ve looked at various types of annotation you can add to your documents, such as highlights, and sticky notes; lines, arrows, and shapes.

We’ve also seen how you can redact sensitive information.

We’ve looked at how to stamp your documents – either with text or images.

And we saw how you can search for documents based on text in their annotations.

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