

Title: Scan Station --Use of Annotations and Stamps
Authority: Records Management Department
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Introduction

Fortis offers a variety of operating preferences that allow the scan operator to make notations about documents. These preference settings apply to the workstation only and must be set for each Scan Station.

These procedures are set forth to ensure consistency of all documents scanned and edited through the system software (Fortis). Two types of annotation will be used (1) Note and (2) Stamp. Creation and use of any other annotation note or stamp must be approved by the Department Manager.

Annotation and Stamp -- Format Standards

Annotation—Note

This feature allows the scan operator to add a note to a scanned image. Notes allow the Scan Operator to enter more text than a “stamp.” Notes are not retained by the system; therefore, they must be created each time.

When to use...

1. In some instances, a document (usually a transcript) cannot be captured through the normal scan settings and must be scanned in color. Unless the end user has a color printer, in many cases the printed copy of the color image is not readable. Therefore the scan operator needs to append the following annotation at the top of the scanned image.

“If unable to print a readable copy, call Records Management.”

Retain the original document in an acid-free sleeve, filed in a white notebook, *Unreadable Transcripts..*

2. If the name of the college or university does not appear on the front of the transcript, the scan operator should append the following annotation to the scanned image.

“(Insert name of College/university)

Note: The name of the college appeared only on the back of the transcript.
RM Staff/(insert initials)”

Annotation---Stamp

This feature allows the scan operator to add a “stamp” notation to a document. Stamp information is retained by the system; however, it must be set for each scan station.

The font will be Arial, 20 point, Bold and Red type. Annotations, when possible, will be placed at the top right corner of the document and not over any text.

The following Options must be selected:

- ✓ Protected --specifies that no other user (except an administrator) can modify or delete your Stamps.
- ✓ Always Visible -- specifies that your Stamps are always visible when the document is viewed or printed, even when the Hide Annotations option is on.

The following “stamps” have been set and are to be applied by the scan operator in accordance with the project quality standards. The purpose of these stamps is to identify the quality or integrity of the document received for imaging.

Stamp Name	When to Apply the Stamp	Document Mostly Associated With the Stamp
Poor Source Doc	Source documents which do not meet department quality standards, including visual sharpness, completeness and legibility. Source documents which do not lend themselves well to the standard scan process.	Photocopies, faxes, transcripts (including backs), forms filled out in pencil, etc.
Unofficial	Source documents that do not bear an embossed seal, original signature, color signature, or the mark as defined on the transcript as to what constitutes an official transcript for that institution.	Only Transcripts (especially international)