Objective Trapeze: Stamps Guide

How to create, organise and
share stamps

Objective TRAPEZE

Objective TRAPEZE

Objective

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Creating an approval stamp

Stamps provide a consistent set of electronic content that can be inserted into a file using Objective Trapeze. Stamps may include text, images (SVG, AI or PDF Files supported) or metadata from other systems.

This section of our guide steps through making the stamp below which can then be used as a template for other stamps:
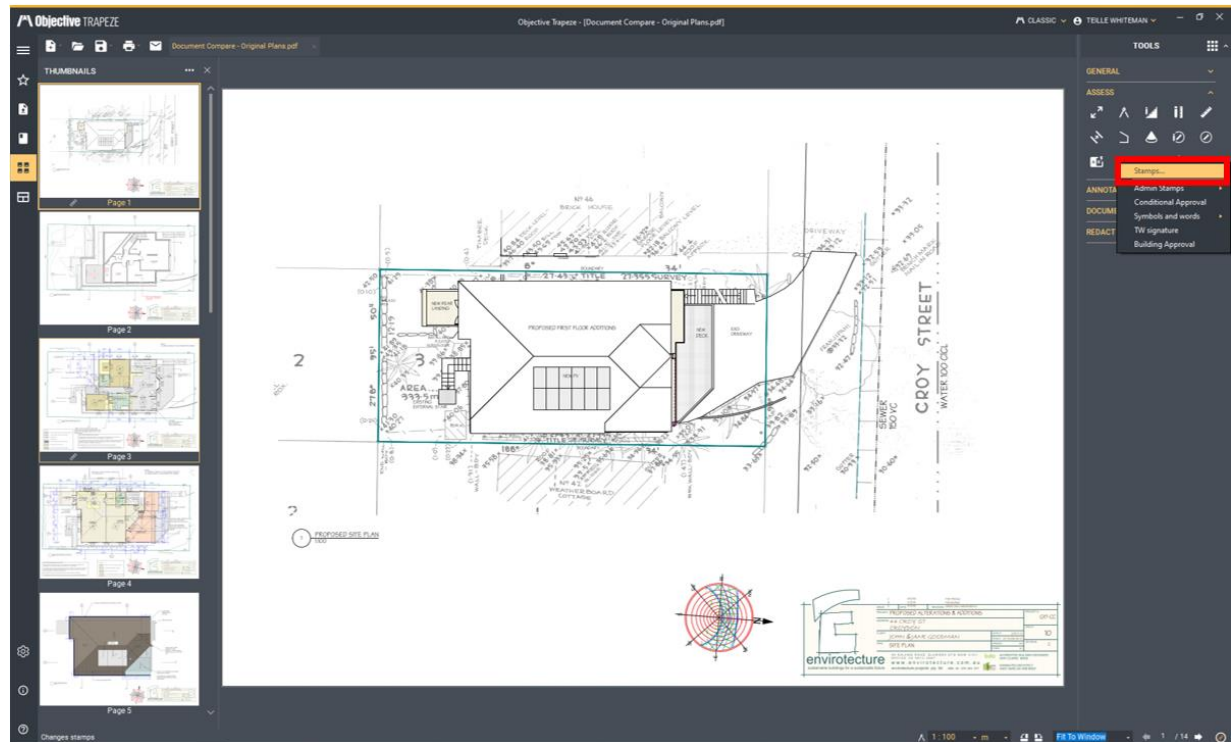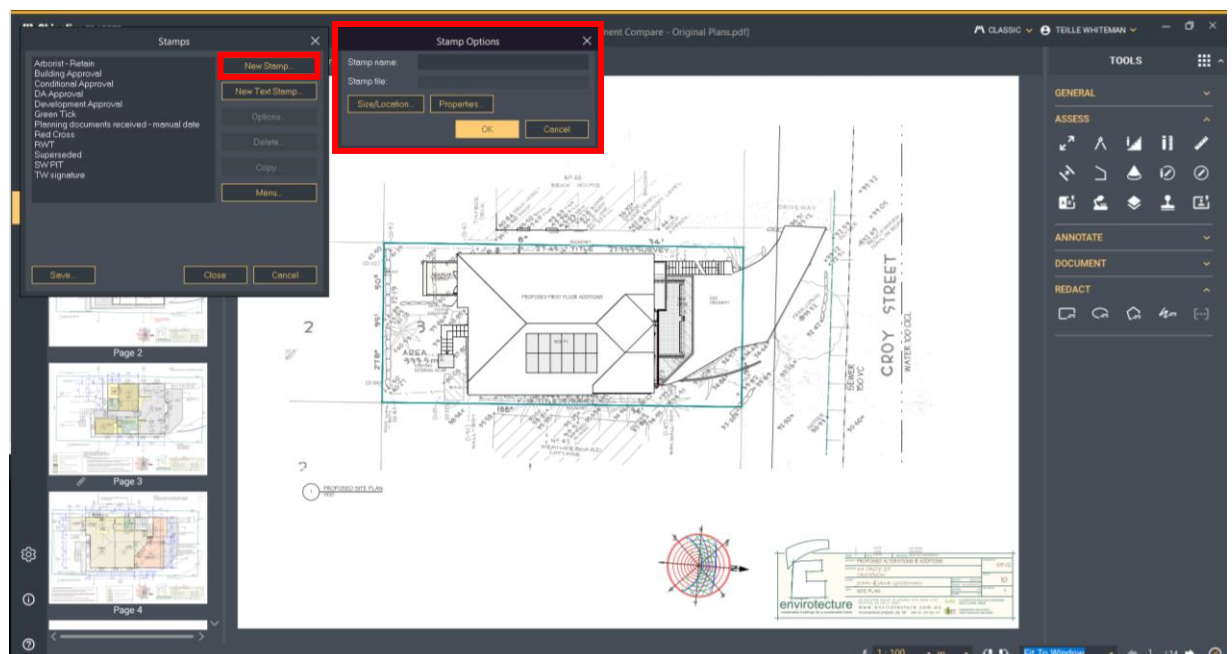

1.1   To create a new stamp

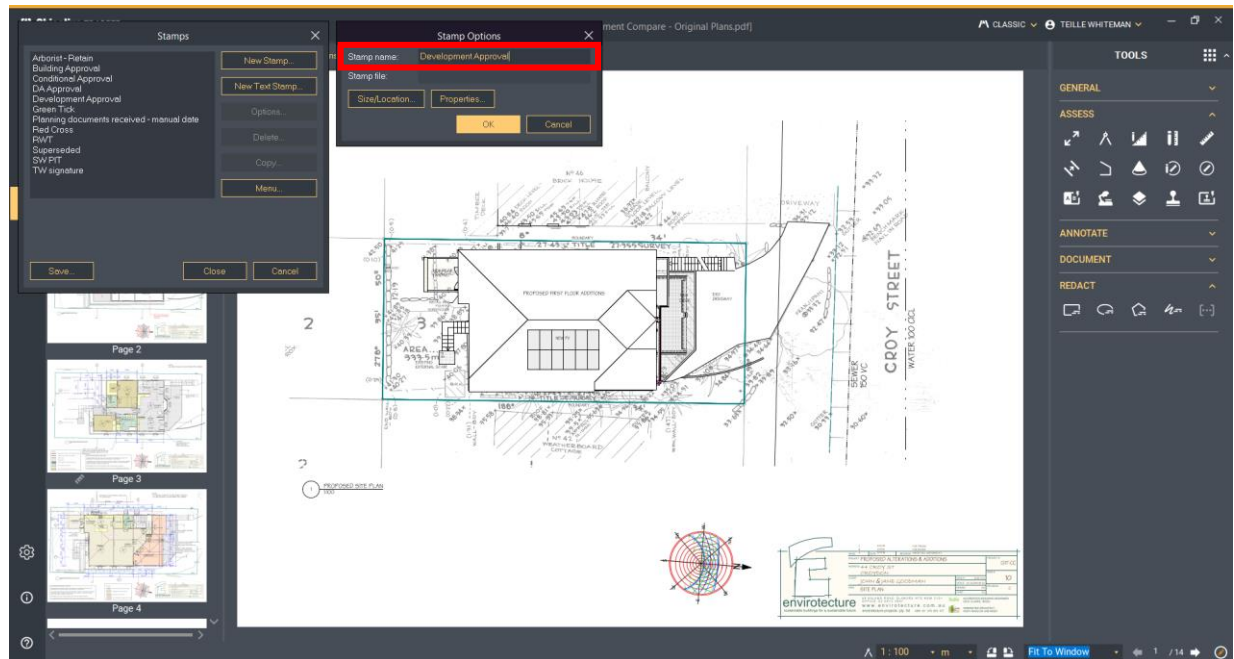1.   Click the **Stamp Annotation Tool** from the **Assess Toolset**.
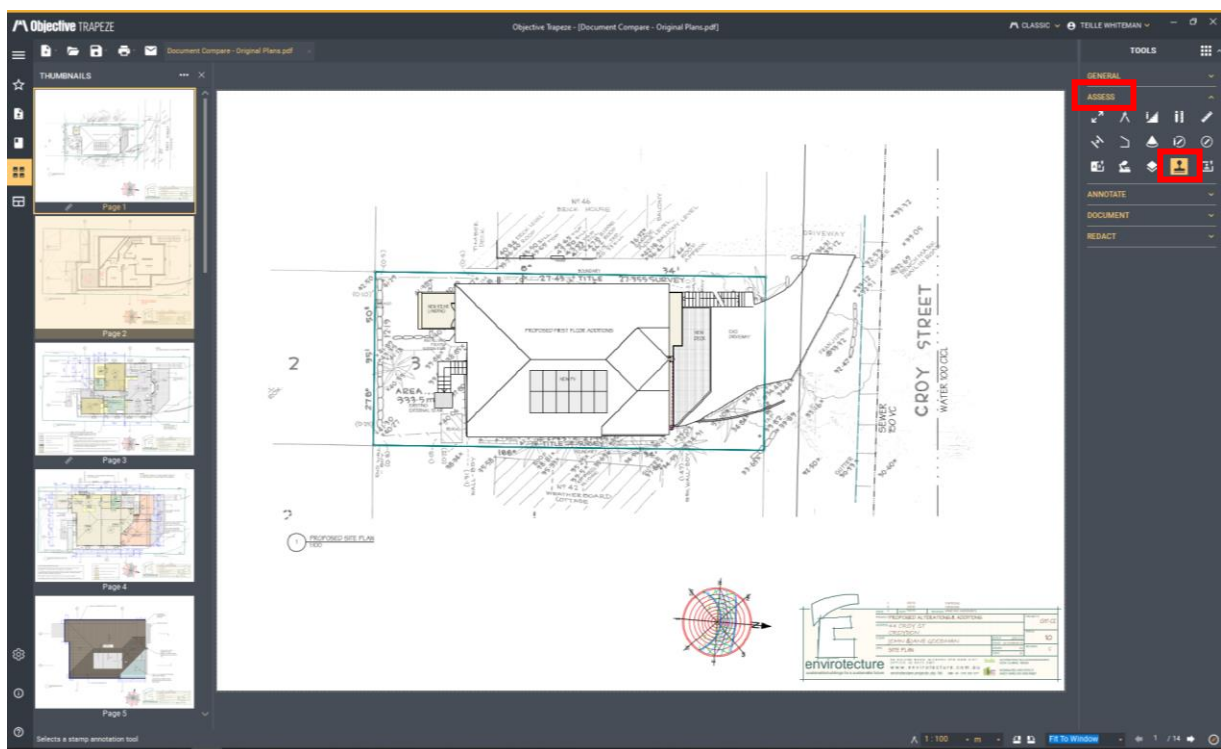
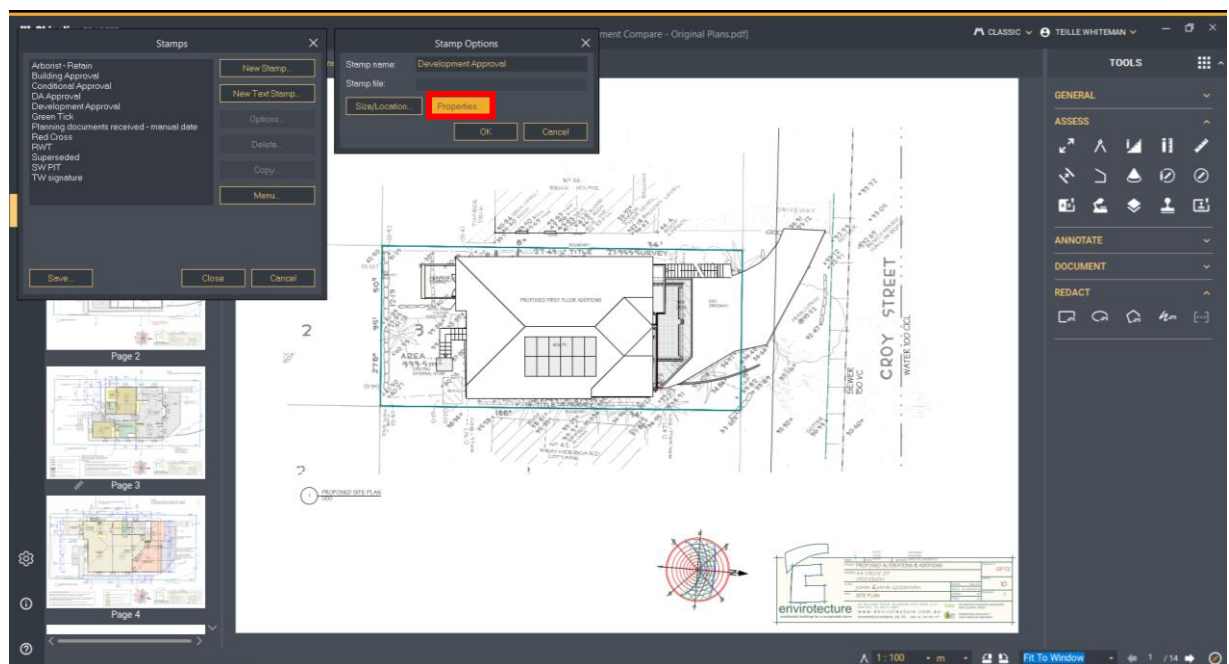2. Select **Stamps** to open the **Stamps** window.

3. Click **New Stamp** to open the **Stamp Options** window.

4. Type a name for the new stamp in the **Stamp name** field.

5. Click **Properties** to open the **Stamp Annotation Properties** window.

6. Click **Open** to use an existing stamp background or image that is an SVG, AI or PDF file. Then follow from Step 9 onward to configure the stamp or add more text/images.
Note: If a stamp background is not available see Step 7 below to create one using Trapeze.
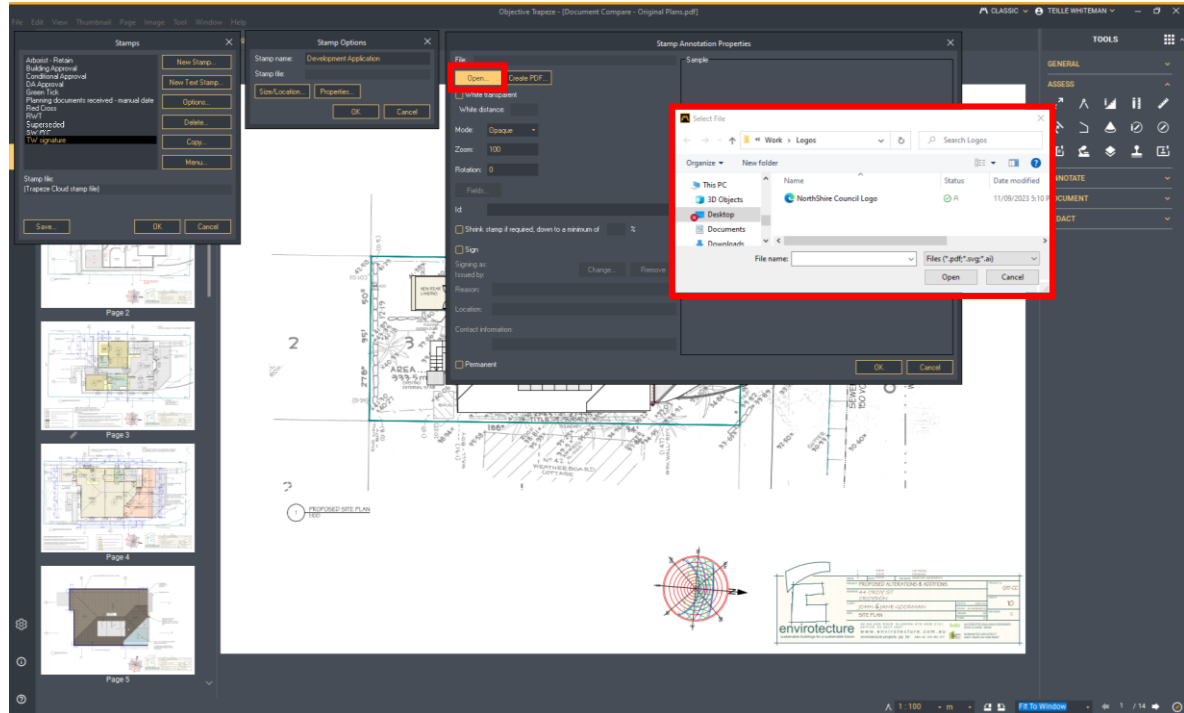
7. Alternatively, click **Create PDF** to open the **Create PDF** window and set the stamp proportions and any border requirements.

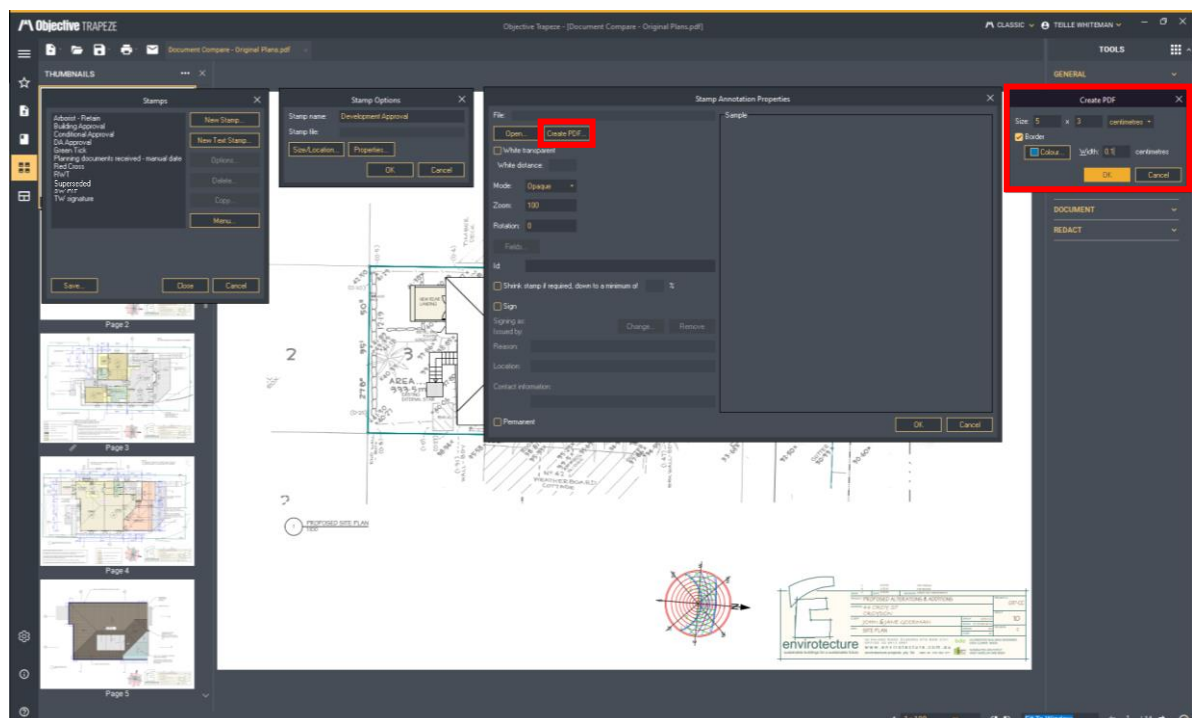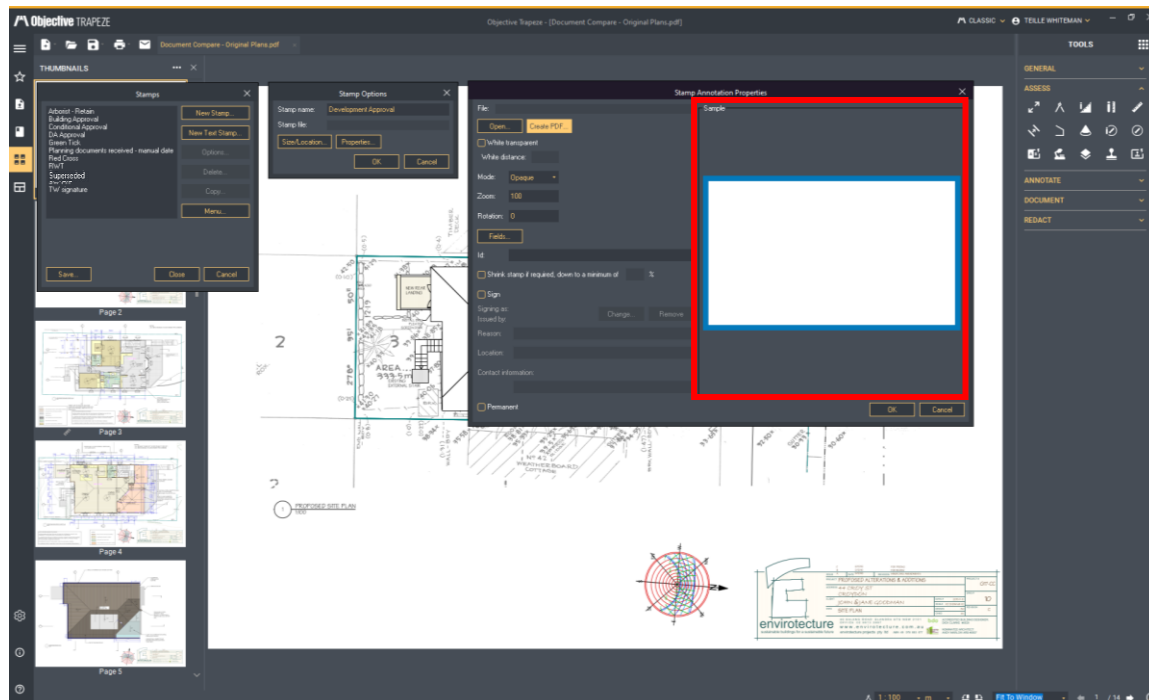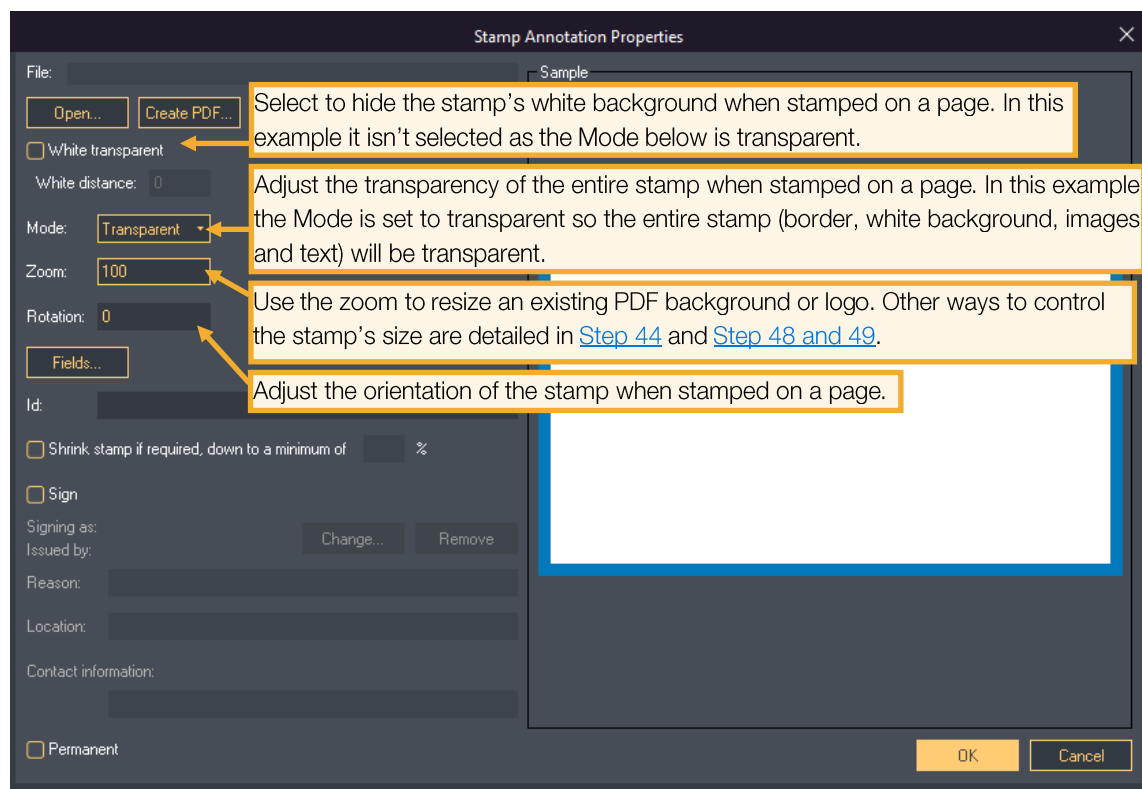8. Click **OK** to return to the **Stamp Annotation Properties** window. The stamp will display in the **Sample** area.
    Note: Click **Create PDF** to make changes to stamp proportions or border style.


9. Change the stamps transparency, zoom or rotation as required.

Select to hide the stamp's white background when stamped on a page. In this example it isn't selected as the Mode below is transparent.

Adjust the transparency of the entire stamp when stamped on a page. In this example the Mode is set to transparent so the entire stamp (border, white background, images and text) will be transparent.

Use the zoom to resize an existing PDF background or logo. Other ways to control the stamp's size are detailed in Step 44 and Step 48 and 49.

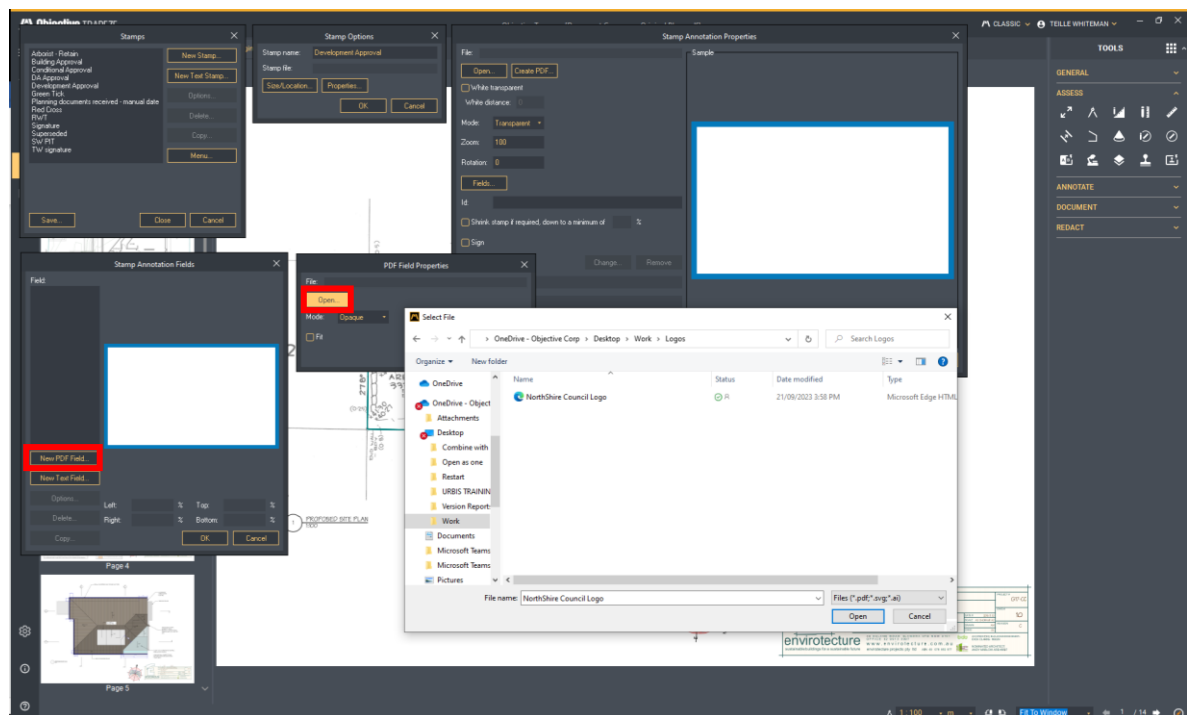Adjust the orientation of the stamp when stamped on a page.

1.2 Add image/s (SVG, AI and PDF) to a stamp

10. Click **Fields** to add image/s to the stamp i.e. organisation logo.
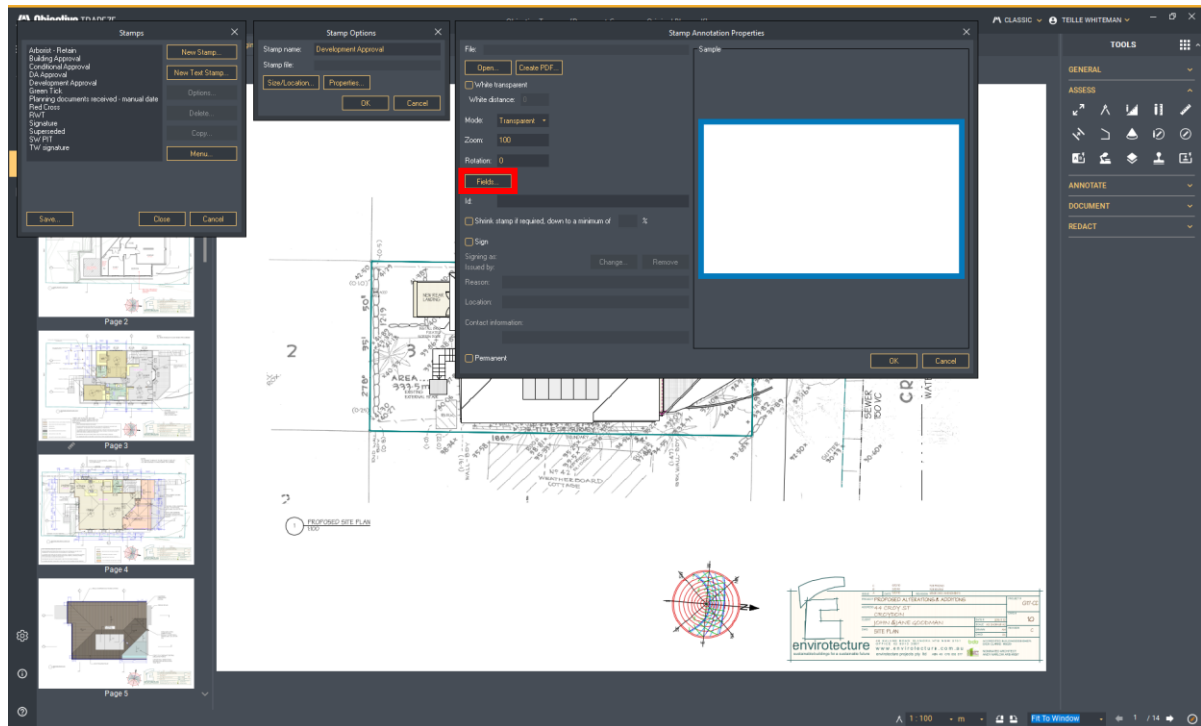
11. Click **New PDF Field** then **Open** to select and open a SVG, AI or PDF file.

12. Select the required **Mode** which controls the transparency of the image. This is necessary when layering multiple images/text on top of each other. In this example, it does not need to be changed as the logo will sit separate to the other text fields. Please contact Trapeze Support for assistance relating to the layering of stamp fields.
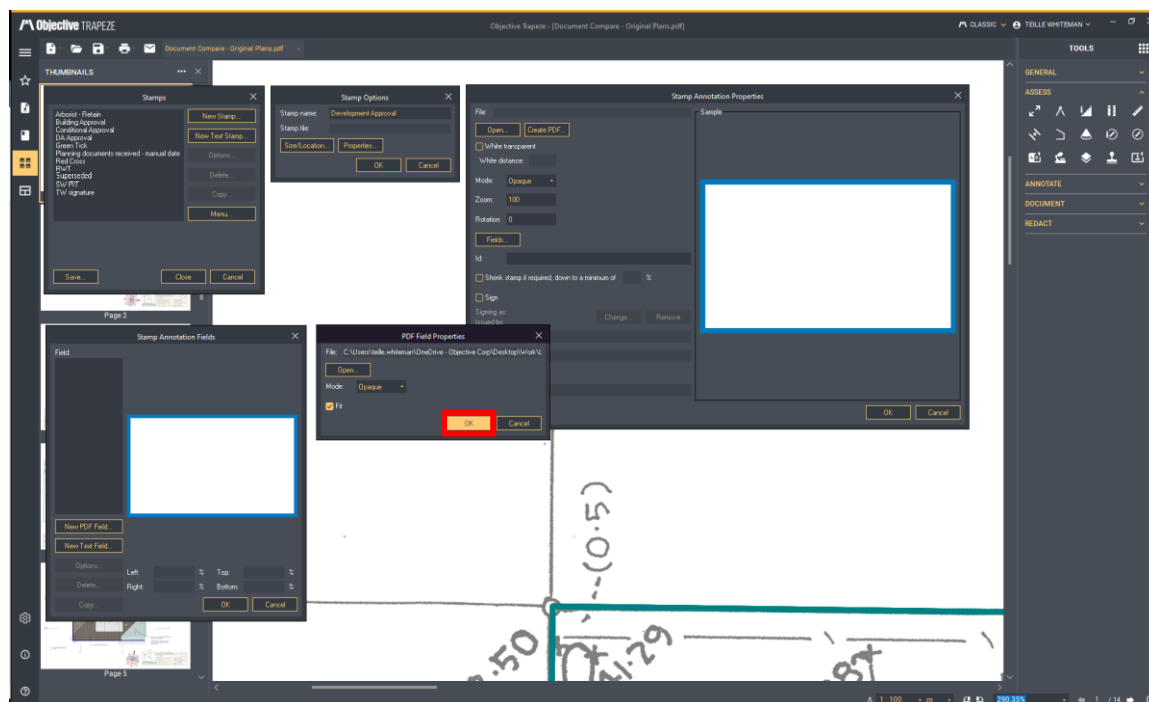
See Step 9 for information about controlling the transparency of the entire stamp.
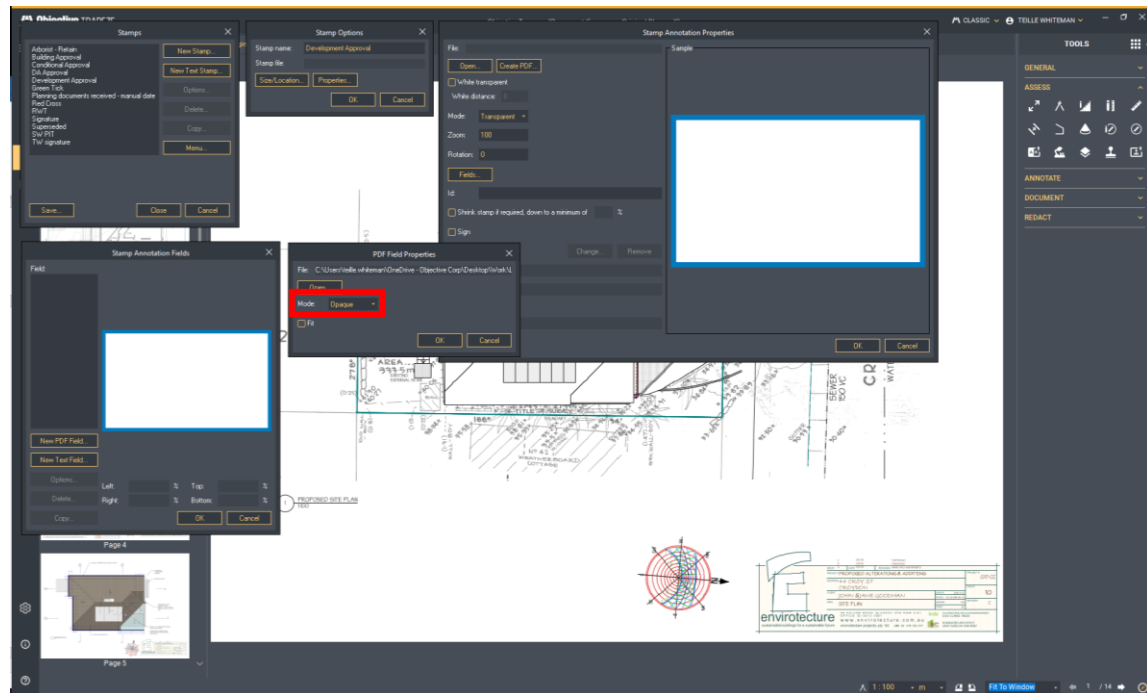
13. Select **Fit** to retain the original proportions of the image.
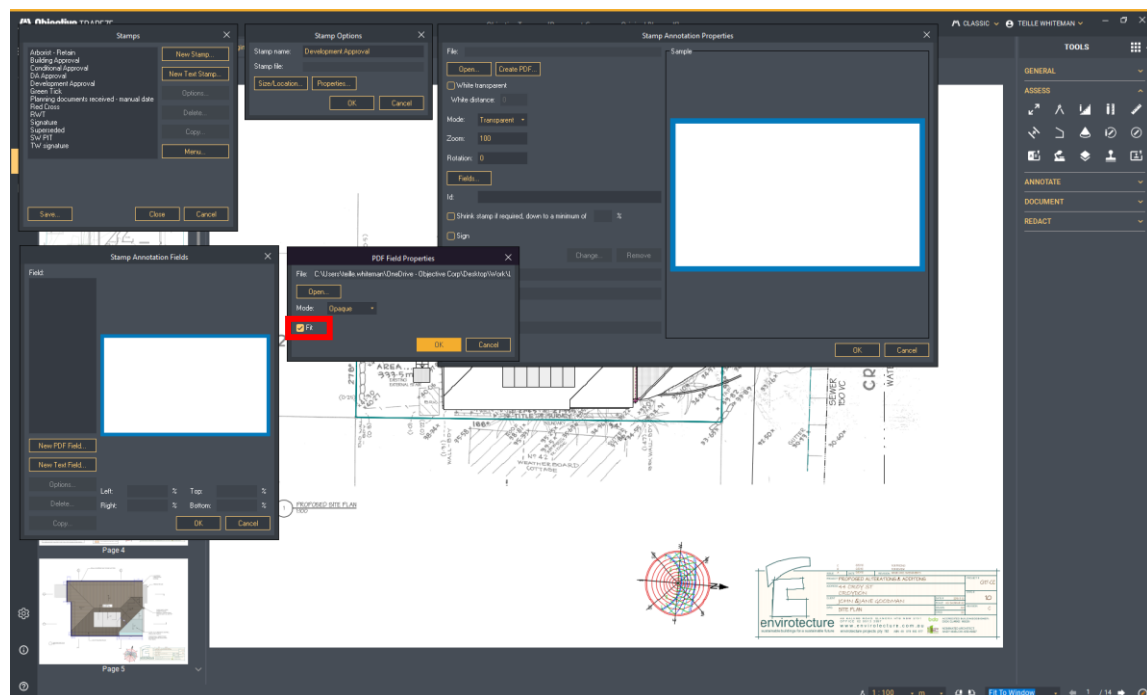
14. Click **OK** to return to the **Stamp Annotation Fields** window.

15. Resize image by dragging the edge of the dotted rectangle in the **Stamp Annotation Fields** window. If required, click and drag the dotted rectangle to reposition image.

    Note: The image will display in the Sample area of the Stamp Annotation Properties window. The image quality does not reflect the stamp's final image quality.
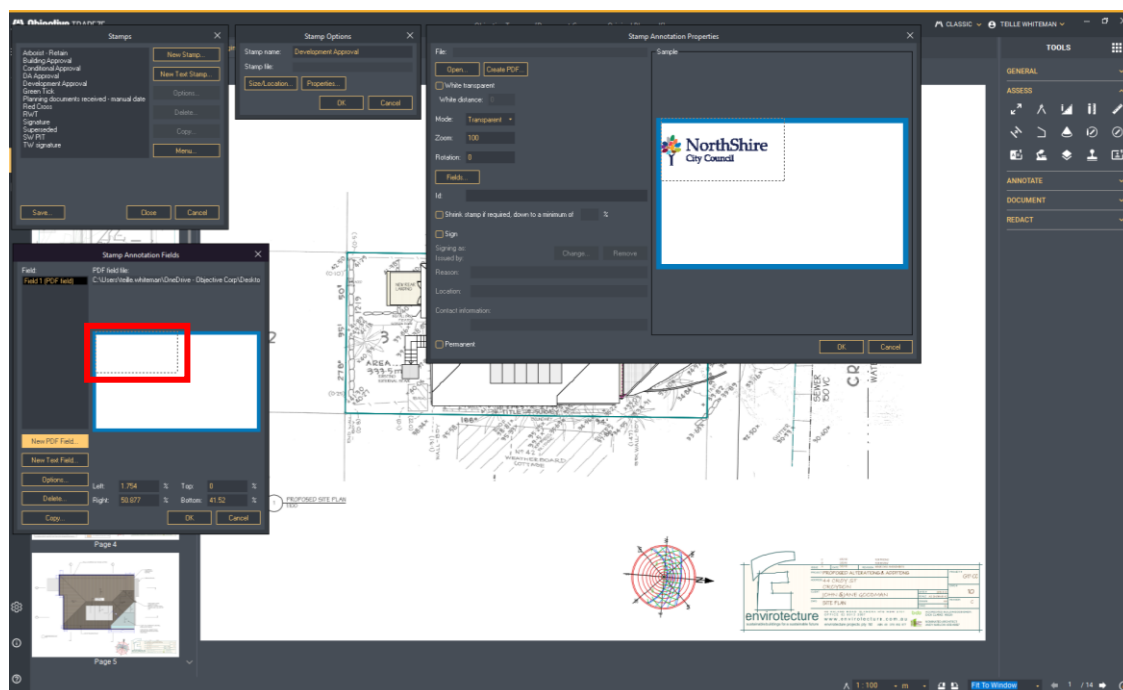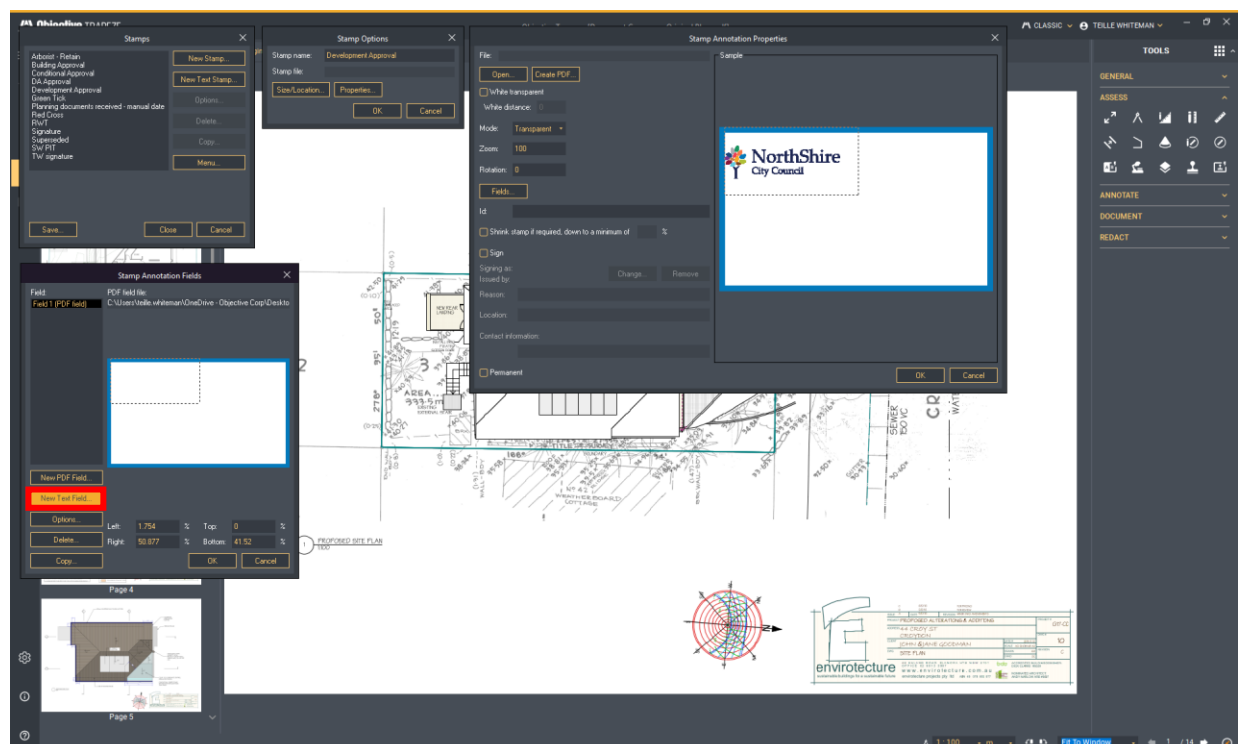
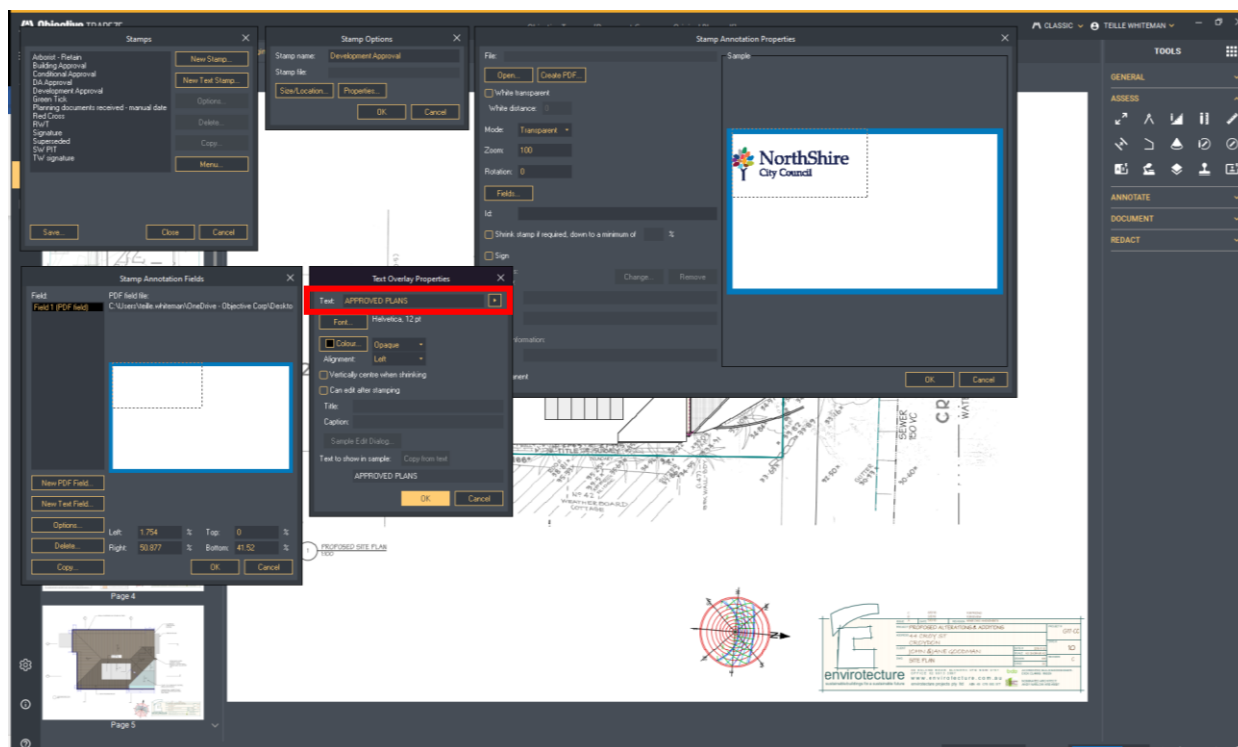16. Click **New PDF Field** to add more images.
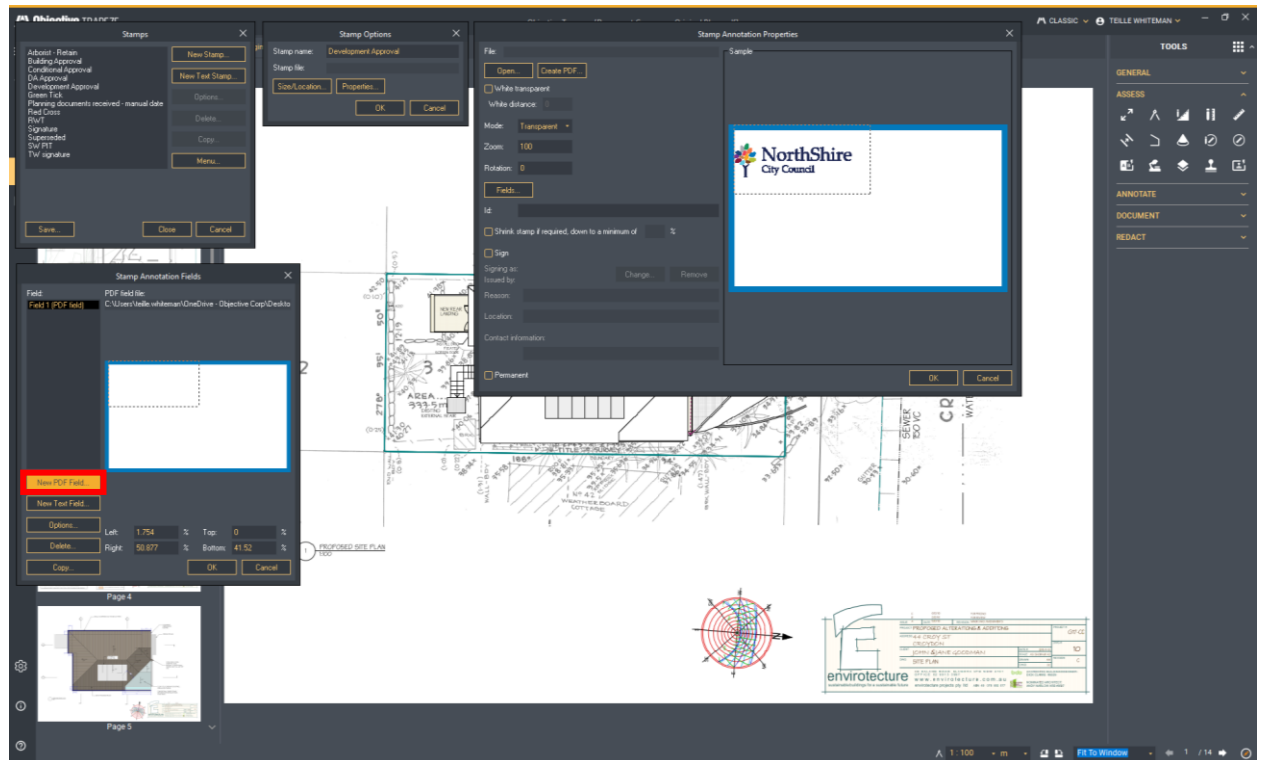
1.3   To add static text to a stamp

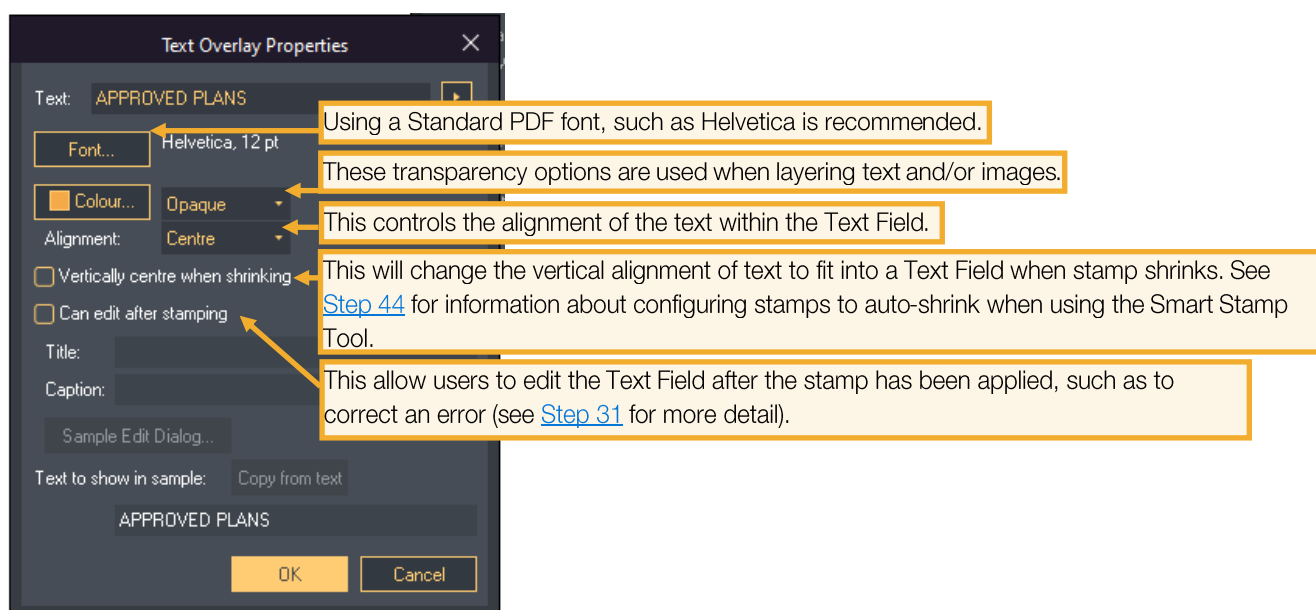17. Click **New Text Field** to add text to the stamp.

18. Type the required text into the **Text** field.


19. Format the appearance of the text as required.
    Note: The transparency options control the transparency of the text which is necessary if layering multiple images/text on top of each other. In this example, it does not need to be changed as the text will sit separate to the other PDF (image) and text fields. Please contact Trapeze Support if you require assistance relating to the layering of stamp fields.

    See Step 9 for information about controlling the transparency of the entire stamp.


Using a Standard PDF font, such as Helvetica is recommended.

These transparency options are used when layering text and/or images.

This controls the alignment of the text within the Text Field.

This will change the vertical alignment of text to fit into a Text Field when stamp shrinks. See Step 44 for information about configuring stamps to auto-shrink when using the Smart Stamp Tool.

This allow users to edit the Text Field after the stamp has been applied, such as to correct an error (see Step 31 for more detail).

20. Click **OK** to display the Text Field as a dotted rectangle in the **Stamp Annotation Fields** window.
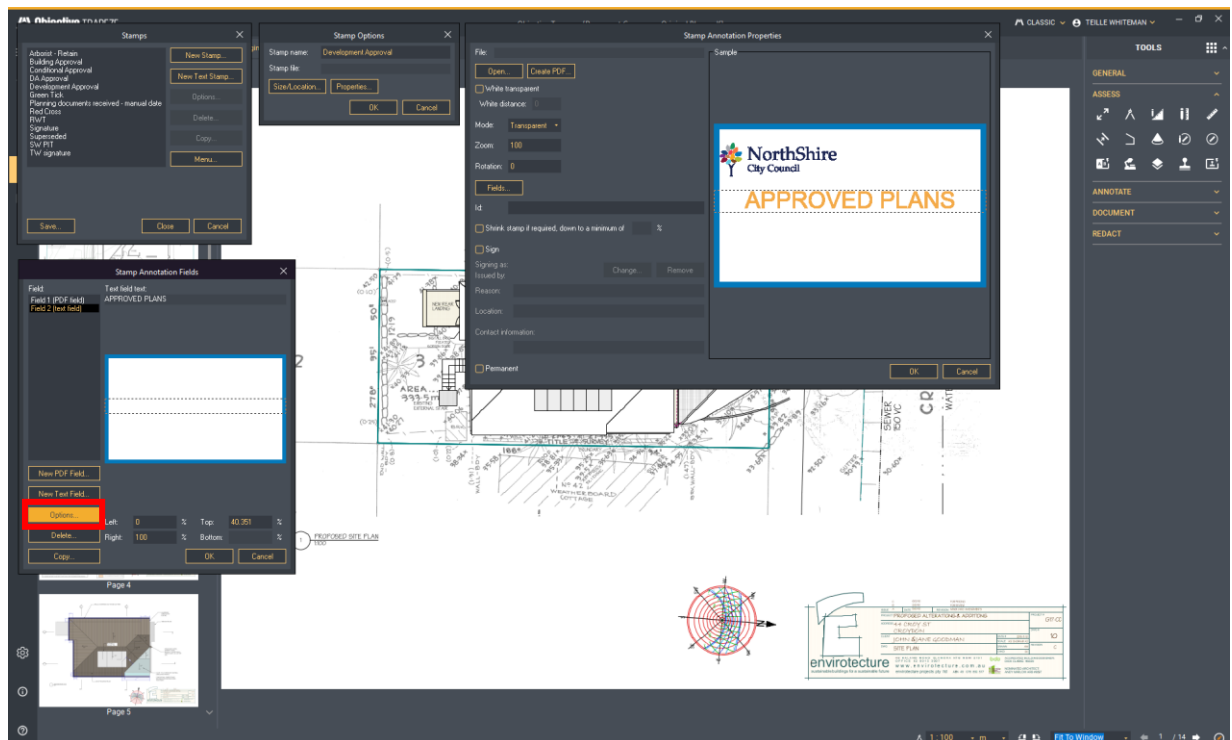**Note:** The formatted text will also display in the Sample area of the **Stamp Annotation Properties** window.
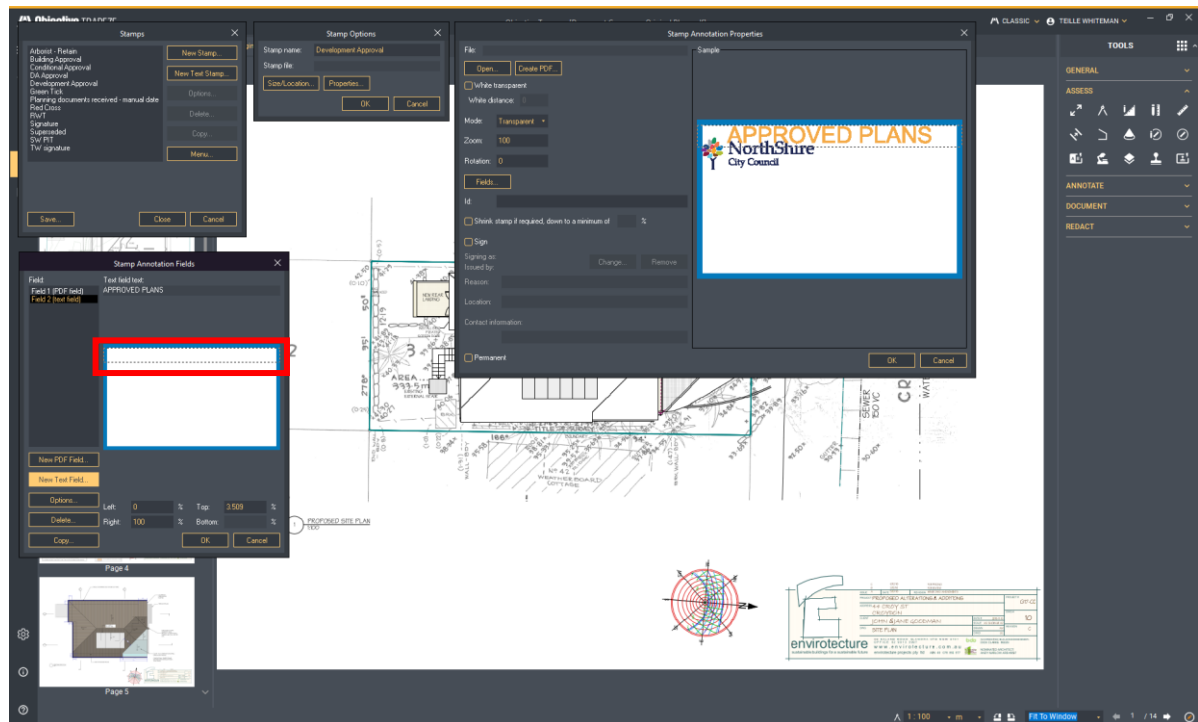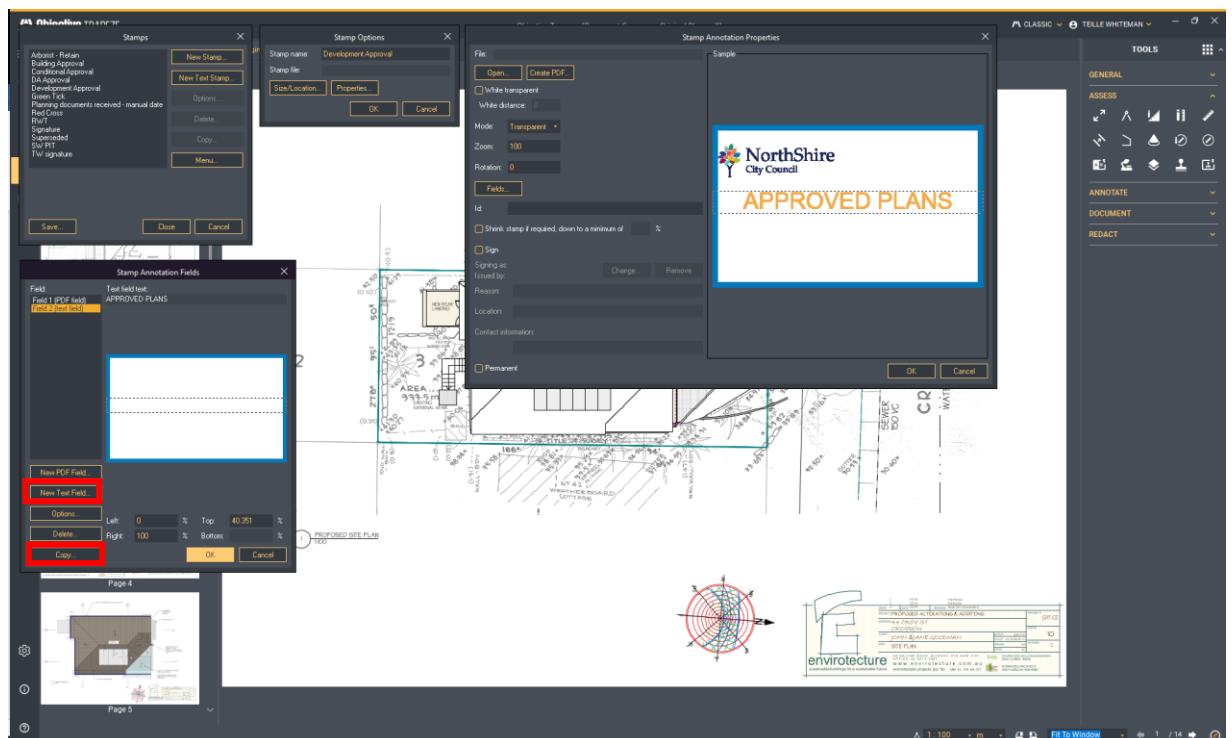

21. Click and drag the dotted rectangle to move the Text Field to the required position.
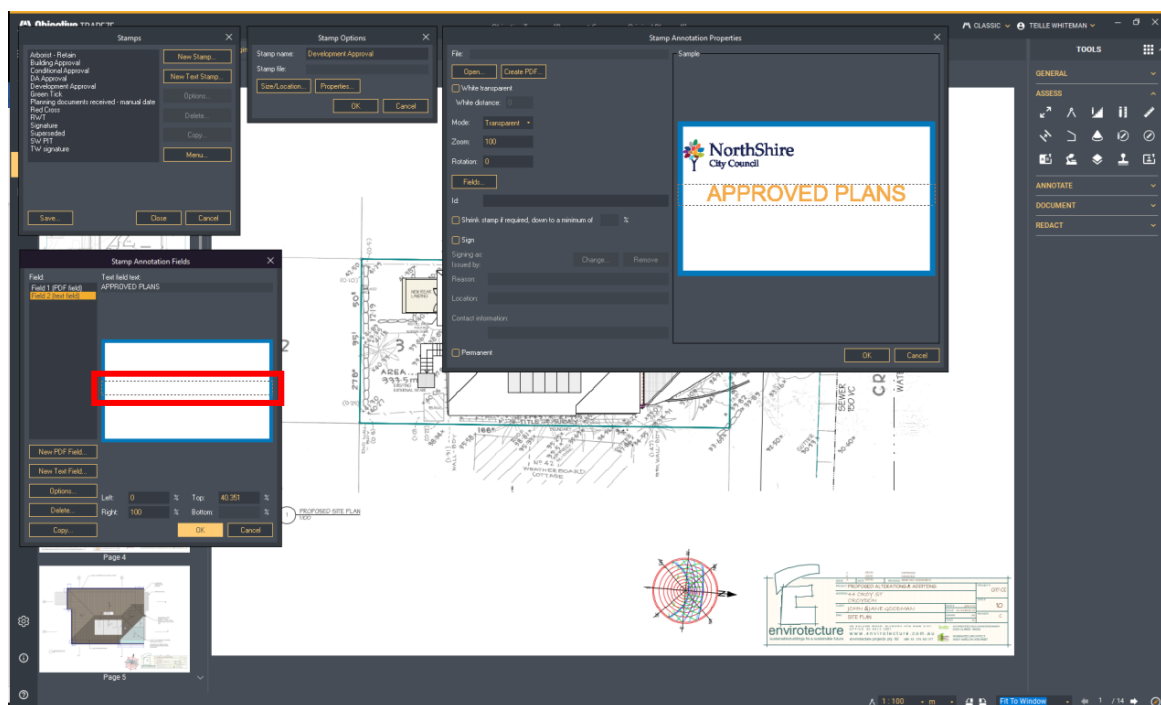
22. Click **Options** or double click on the Text Field to modify the properties.

23. To add another Text Field either select **New Text Field** or **Copy** to duplicate an existing Text Field.
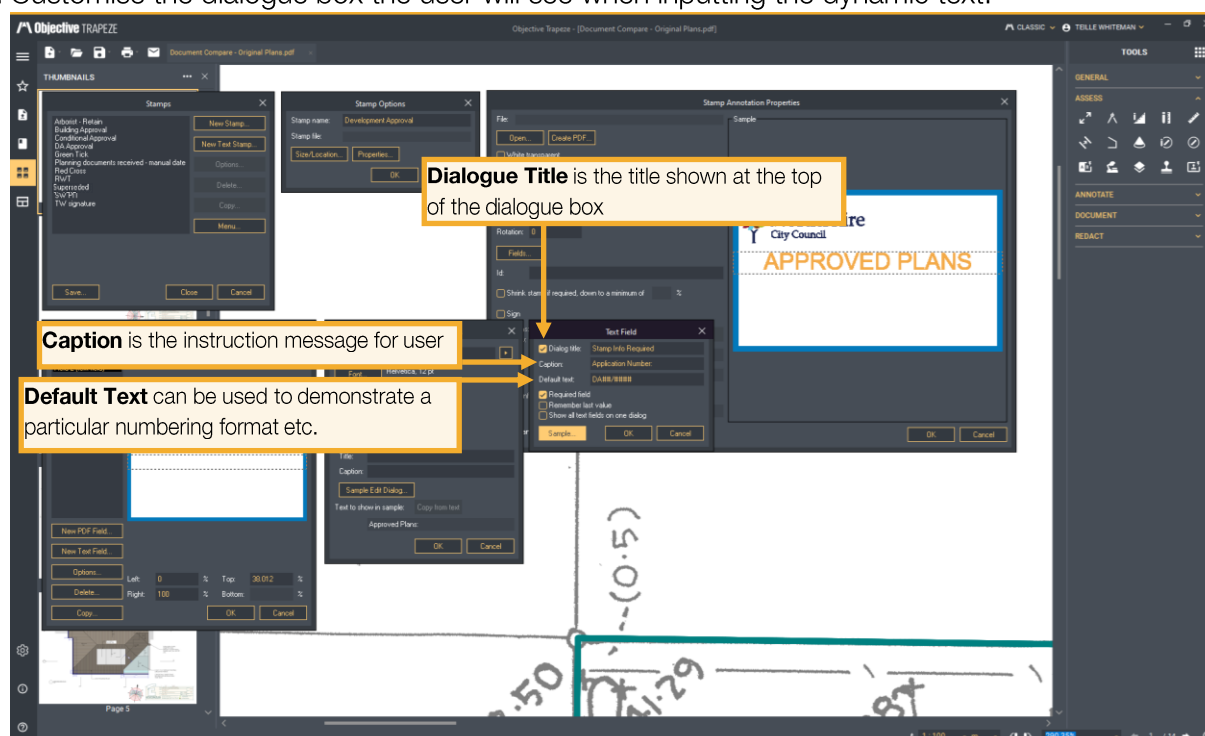
1.4 To add dynamic text to a stamp with a user prompt

24. Create a New Text Field ([Step 23](#) above) and then click the arrow at the end of the **Text** field to display the list of dynamic fields that can be added to a stamp.
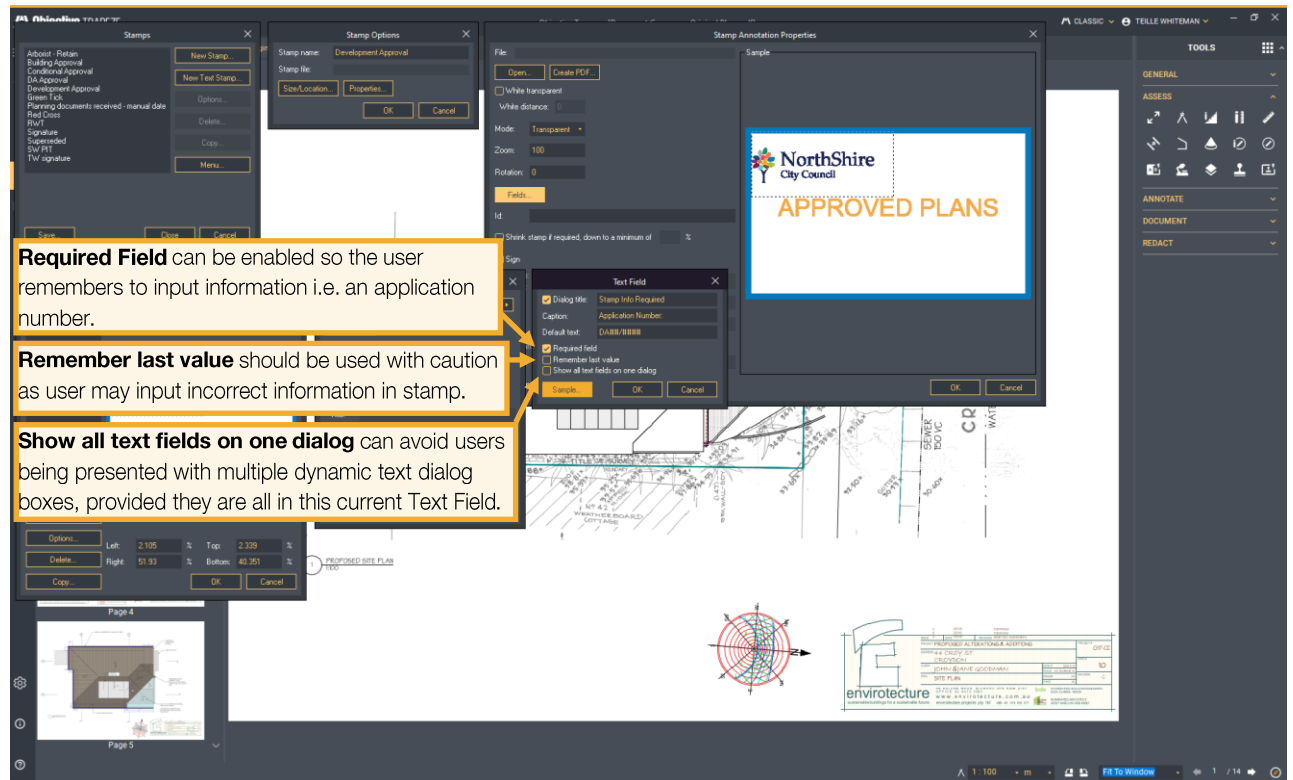**Note:** The **Text** field can contain static and dynamic text. In this example, Application Number: is the static text and **Insert Text Field** is the dynamic text.
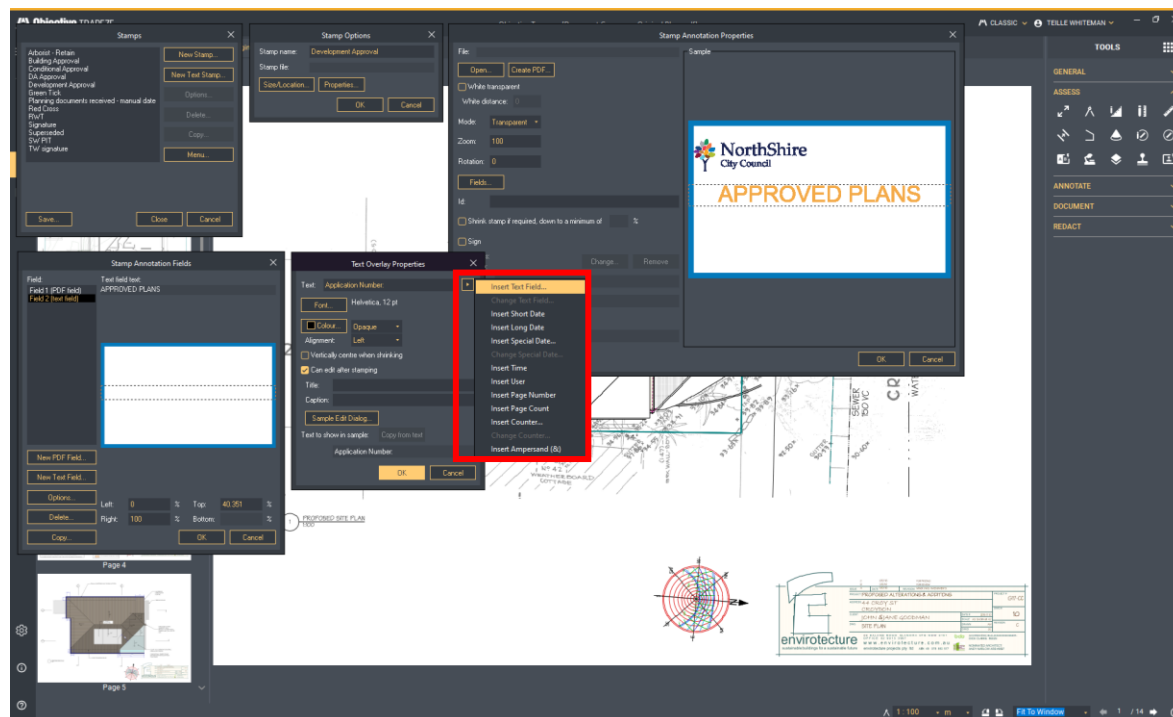

25. Customise the dialogue box the user will see when inputting the dynamic text.

26. Select the checkboxes to configure how the stamp behaves.

Required Field can be enabled so the user remembers to input information i.e. an application number.

Remember last value should be used with caution as user may input incorrect information in stamp.

Show all text fields on one dialog can avoid users being presented with multiple dynamic text dialog boxes, provided they are all in this current Text Field.

27. Click **Sample** to see a preview the resulting dialog box that the user will see when applying this stamp.
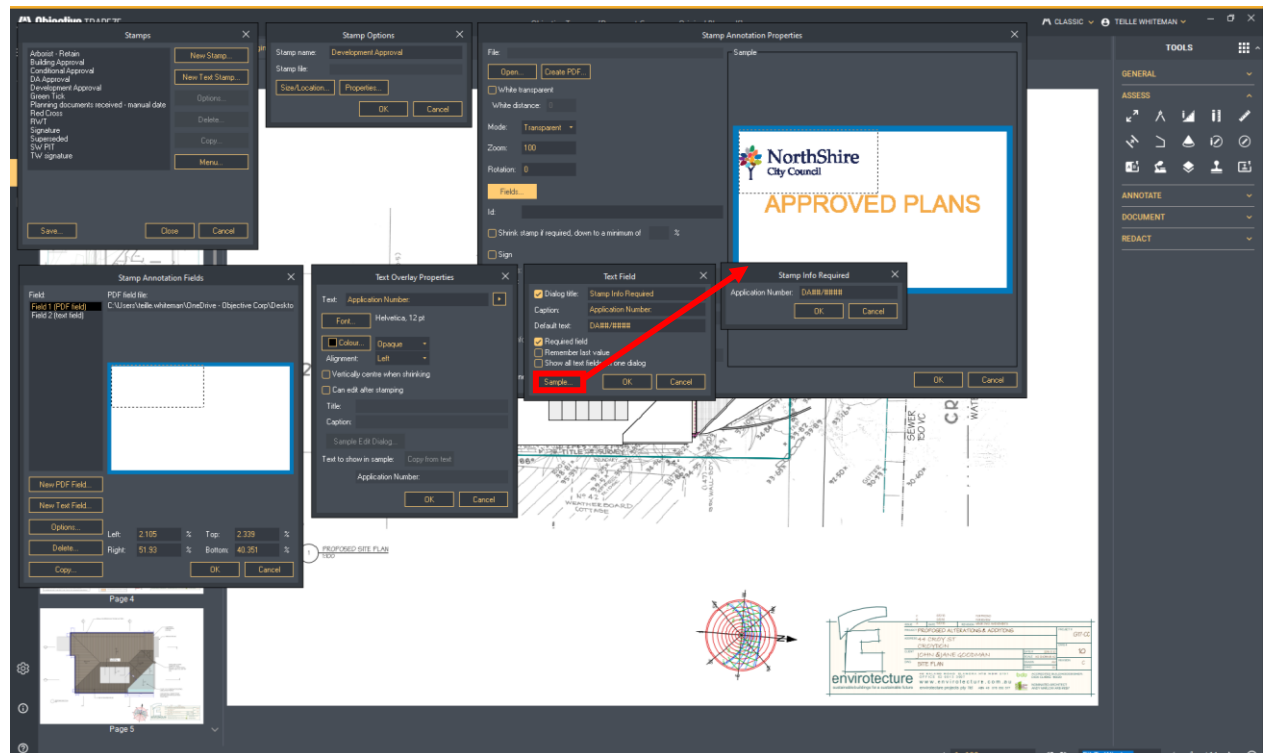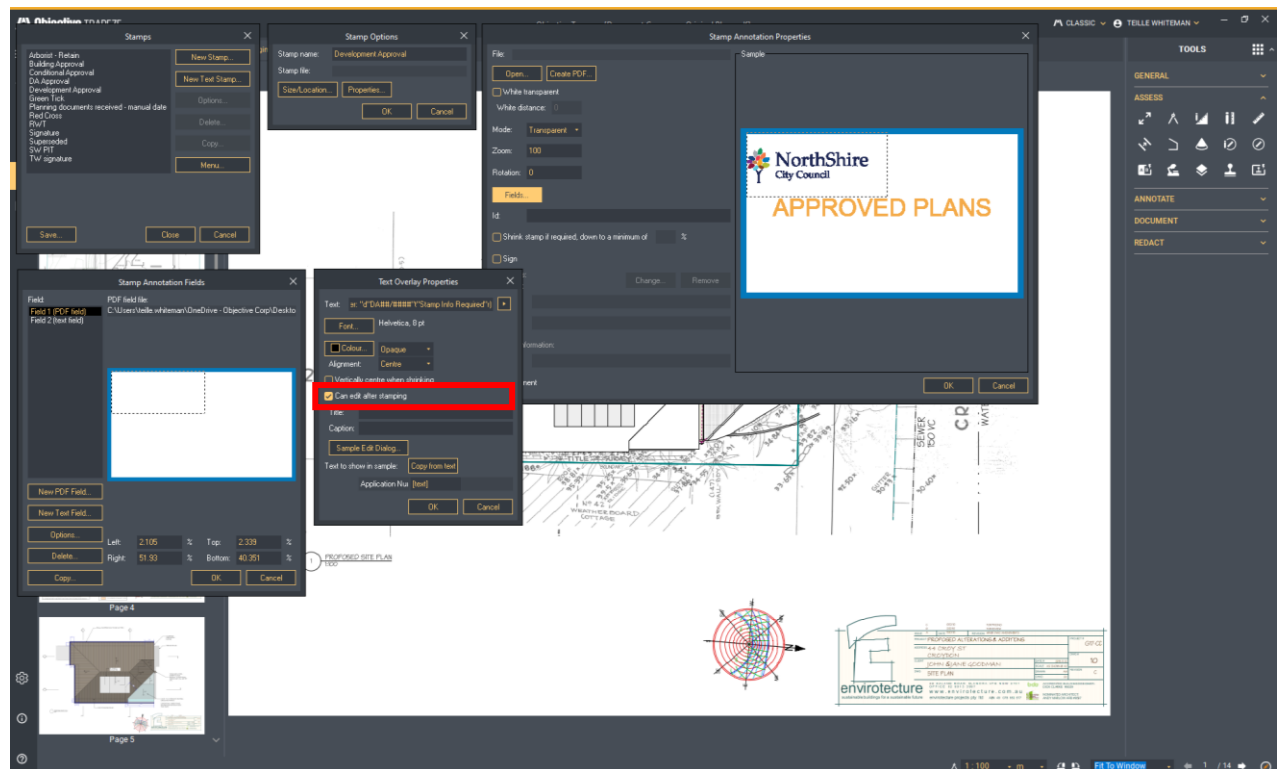
28. Click **OK** to return to the **Text Field** window.

29. Click **OK** to return to the **Text Overlay Properties** window.

30. Format the text as required (see Step 19 for more detail).
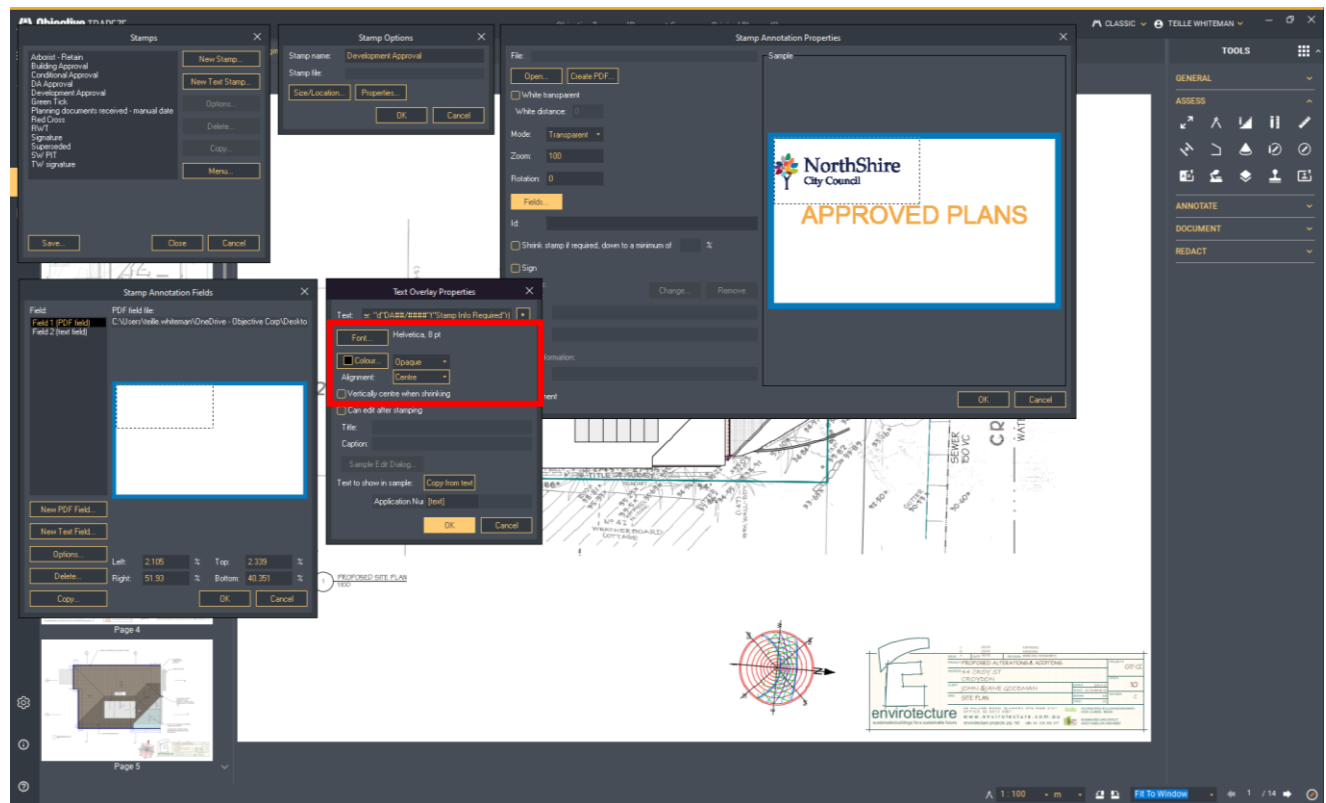
31. Select **Can edit after stamping** to allow users to edit the Text Field after the stamp has been applied, such as to correct an error.

Note: After correcting an error the user can make the stamp permanent with the **Make Annotations Permanent Tool** in the **Document Toolset** so no one else can make changes to the stamp using Trapeze.
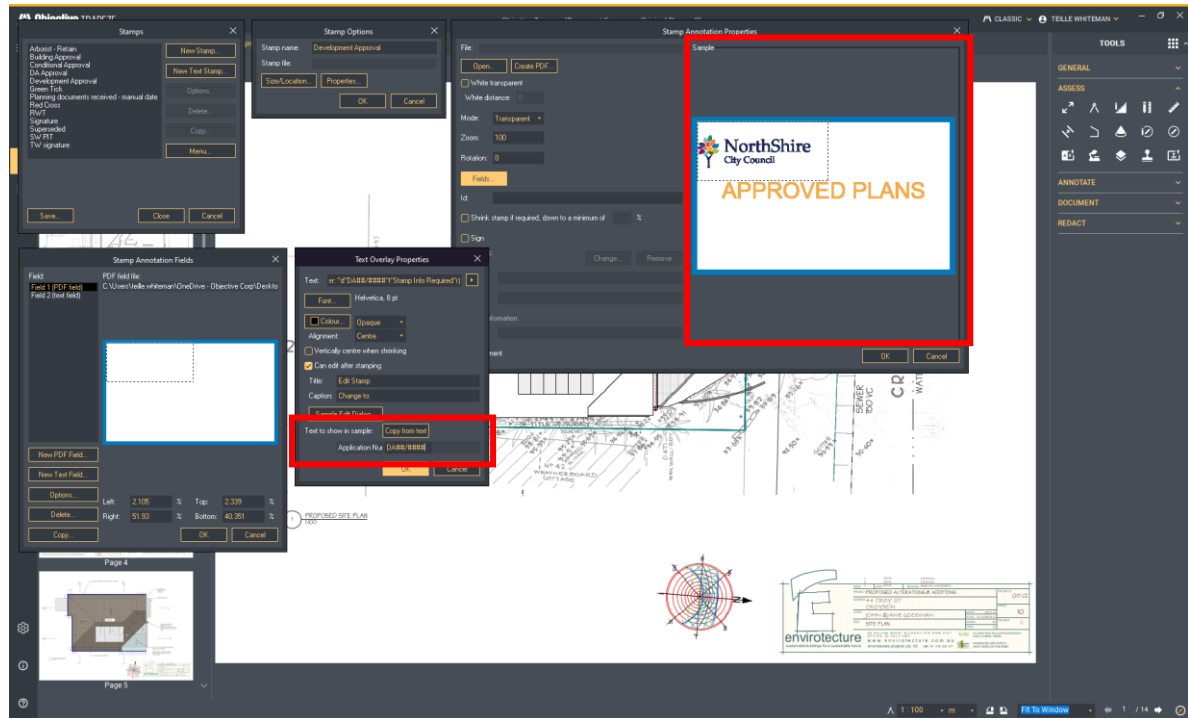
32. Customise the dialogue box the user will see when editing text in the stamp.
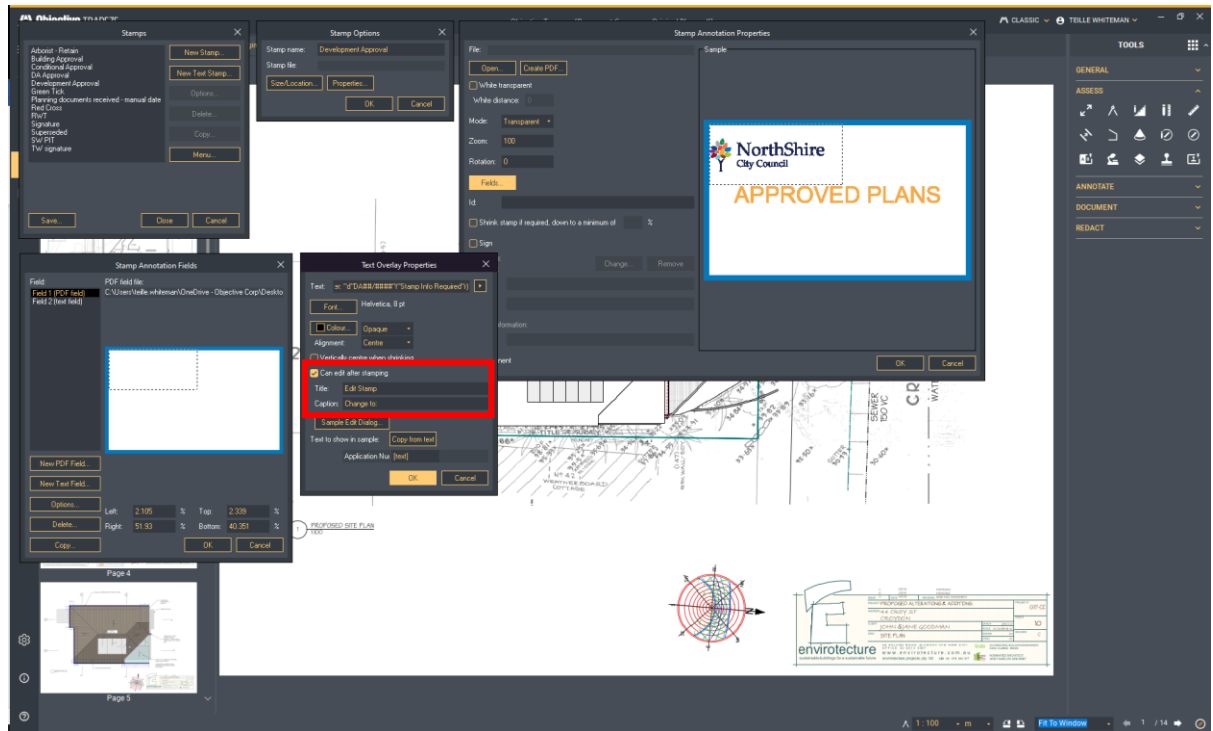
33. Click **Sample Edit Dialogue** to preview the dialogue box that the user will see when applying this stamp. Click **OK** to return to the **Text Overlay Properties** window.
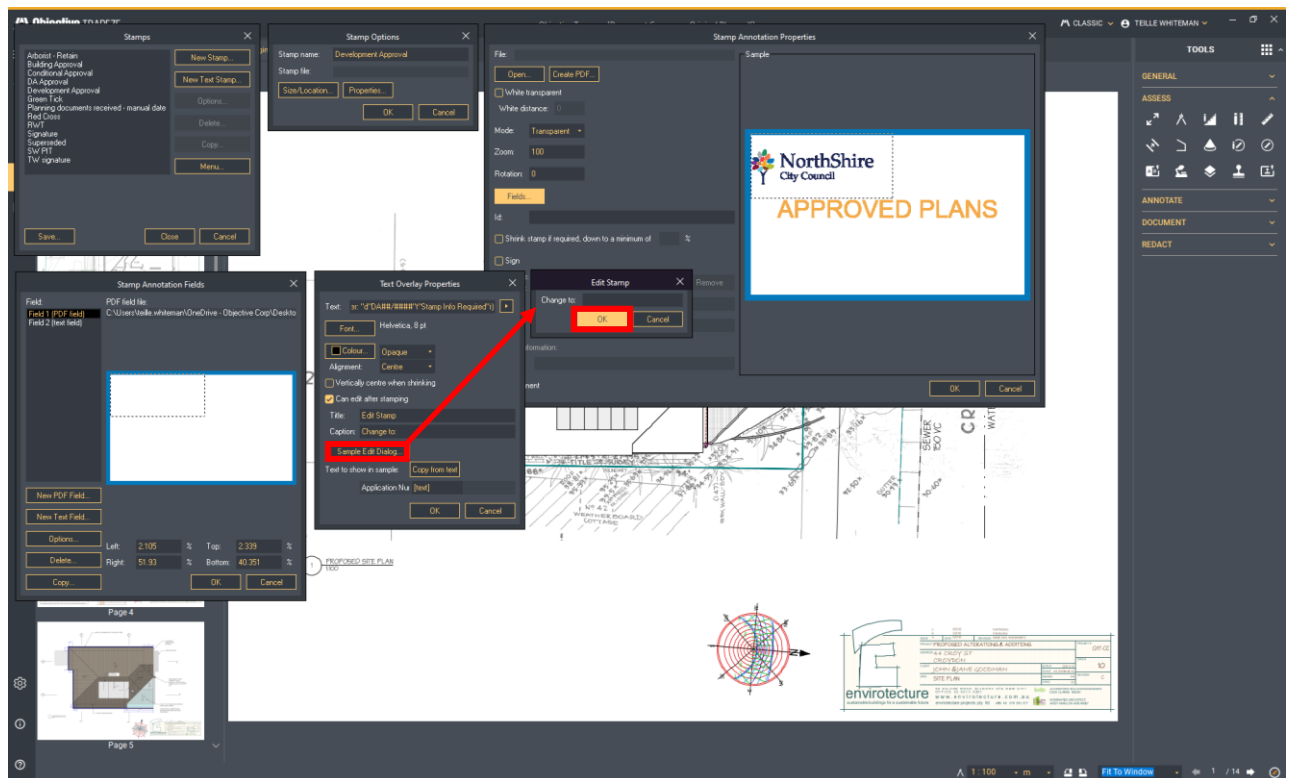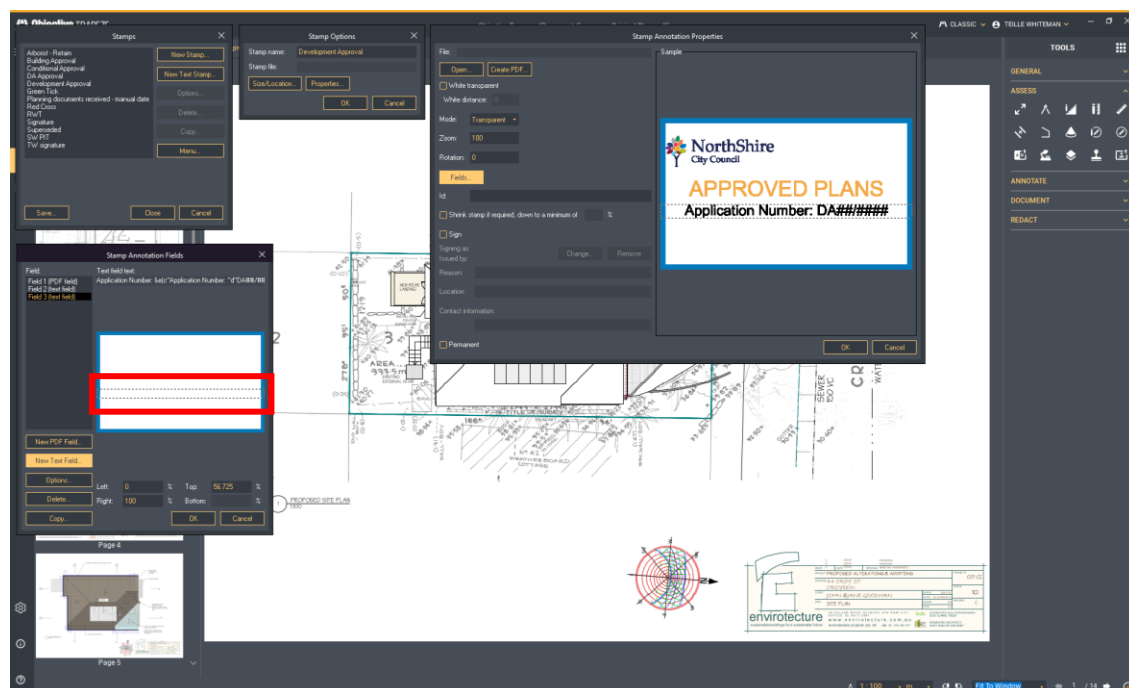
34. Click **Copy from text** to show a more meaningful preview in the Sample area, and type in some text if it prompts.
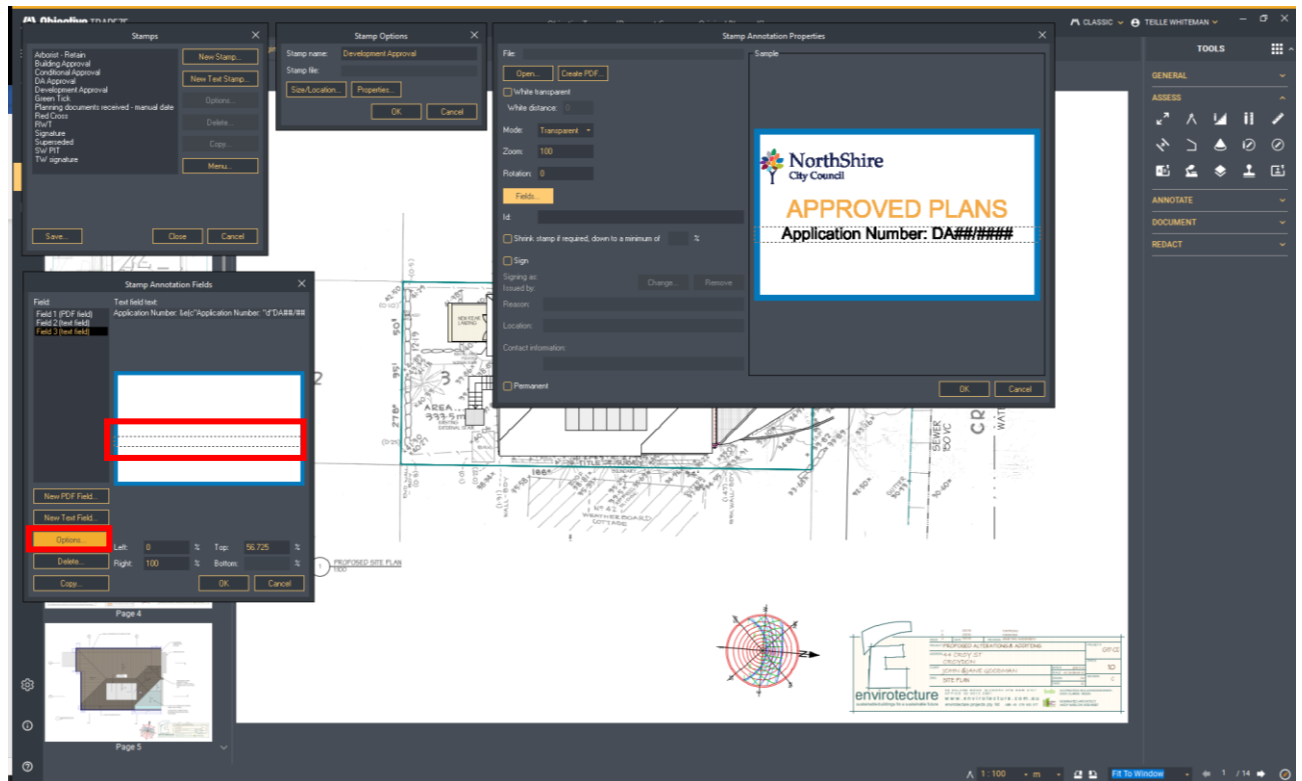

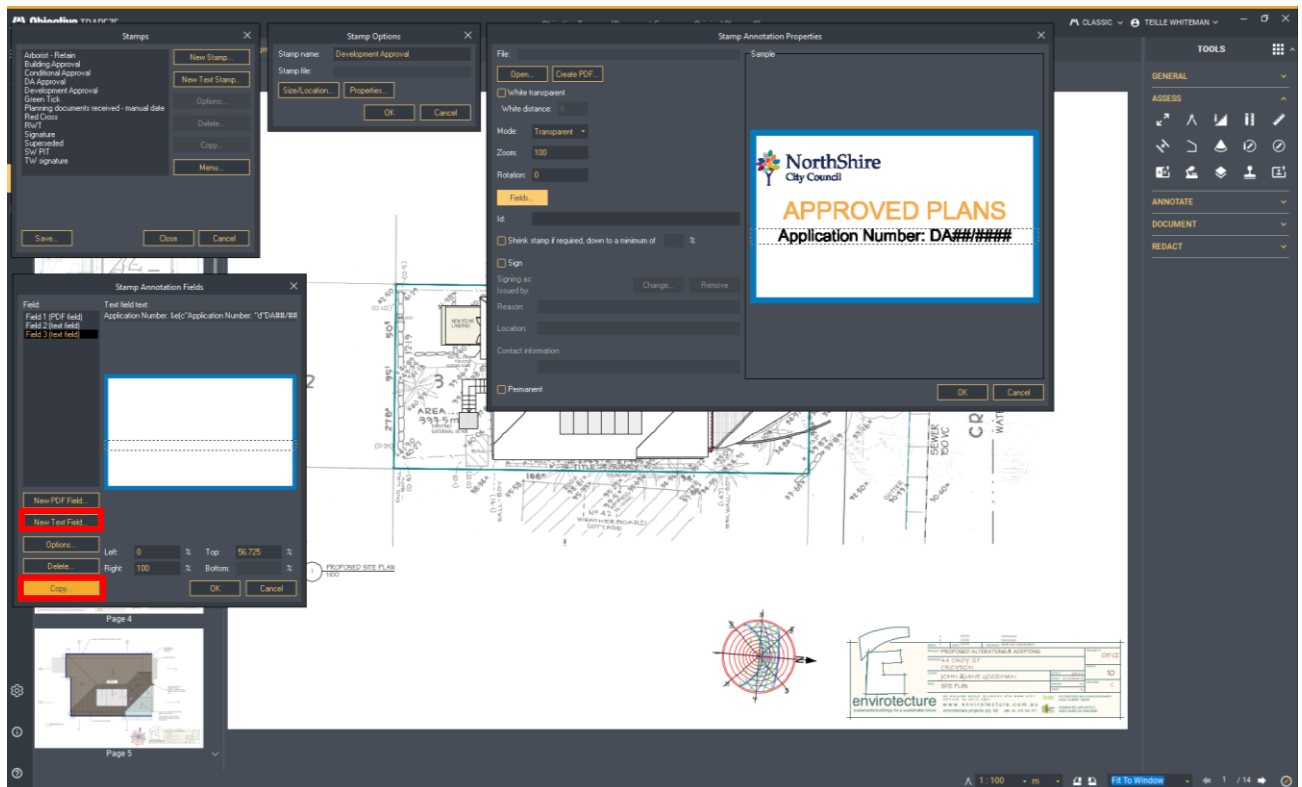35. Click **OK** to return to the **Stamp Annotation Fields** window.

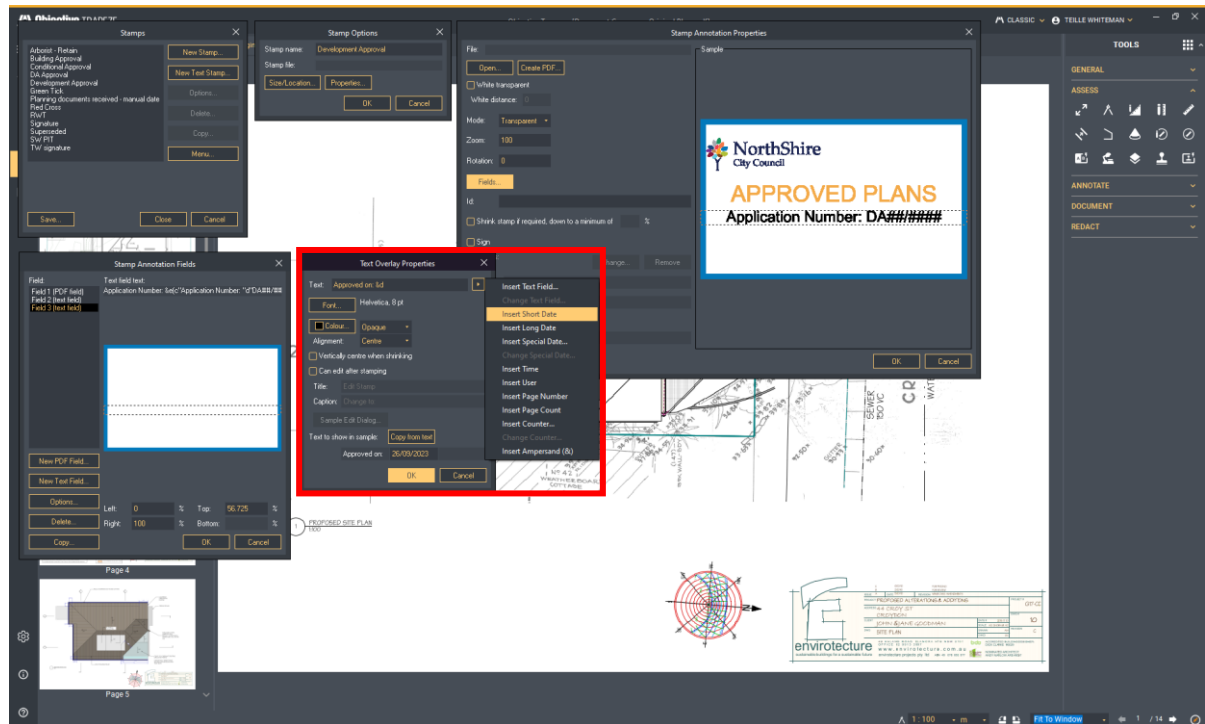36. Click and drag the dotted rectangle to move the Text Field to the required location.

37. To modify the properties of the Text Field double click the dotted rectangle or click **Options**.

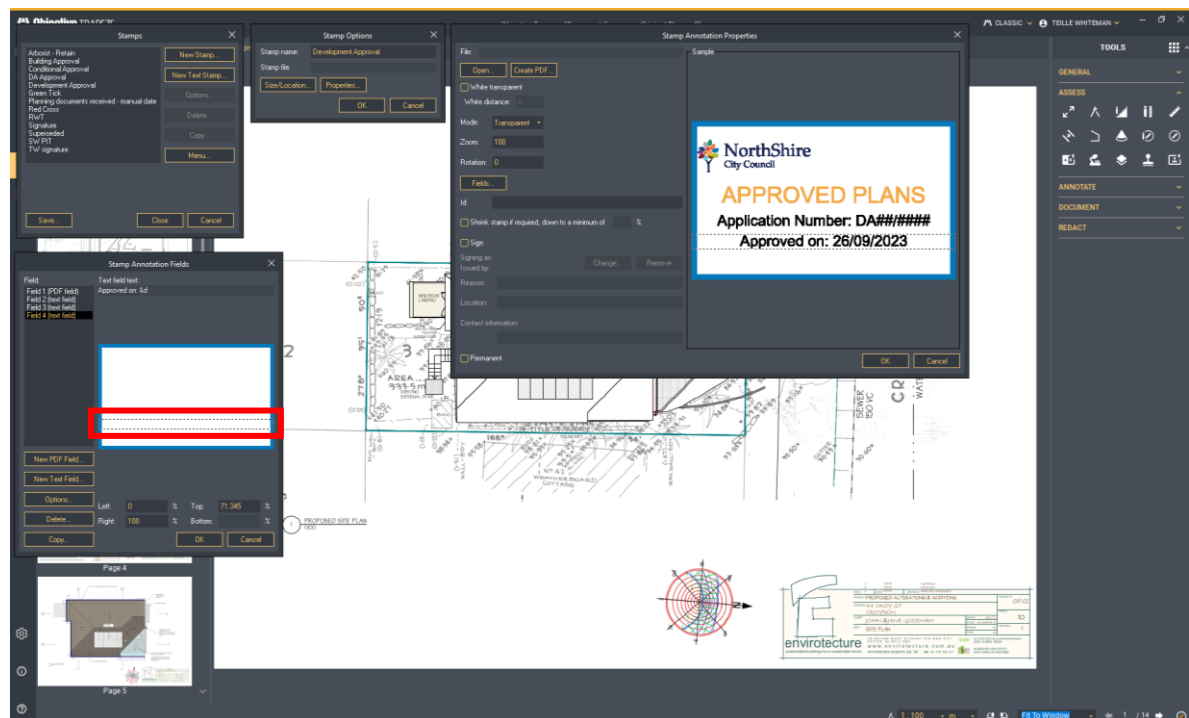38. Click **Copy** or **New Text Field** to create another Text Field.

39. Change the **Text** and formatting as required.

40. Click **OK** to return to the **Stamp Annotation Fields** window.

41. Click and drag the dotted rectangle to move the Text Field to the required location.

42. When finished adding Text Fields and PDF Fields to the stamp, click **OK** on the **Stamp Annotation Properties** window.
Note: Click and drag any of the fields in the Sample area to reposition them or double click the field to modify the properties.
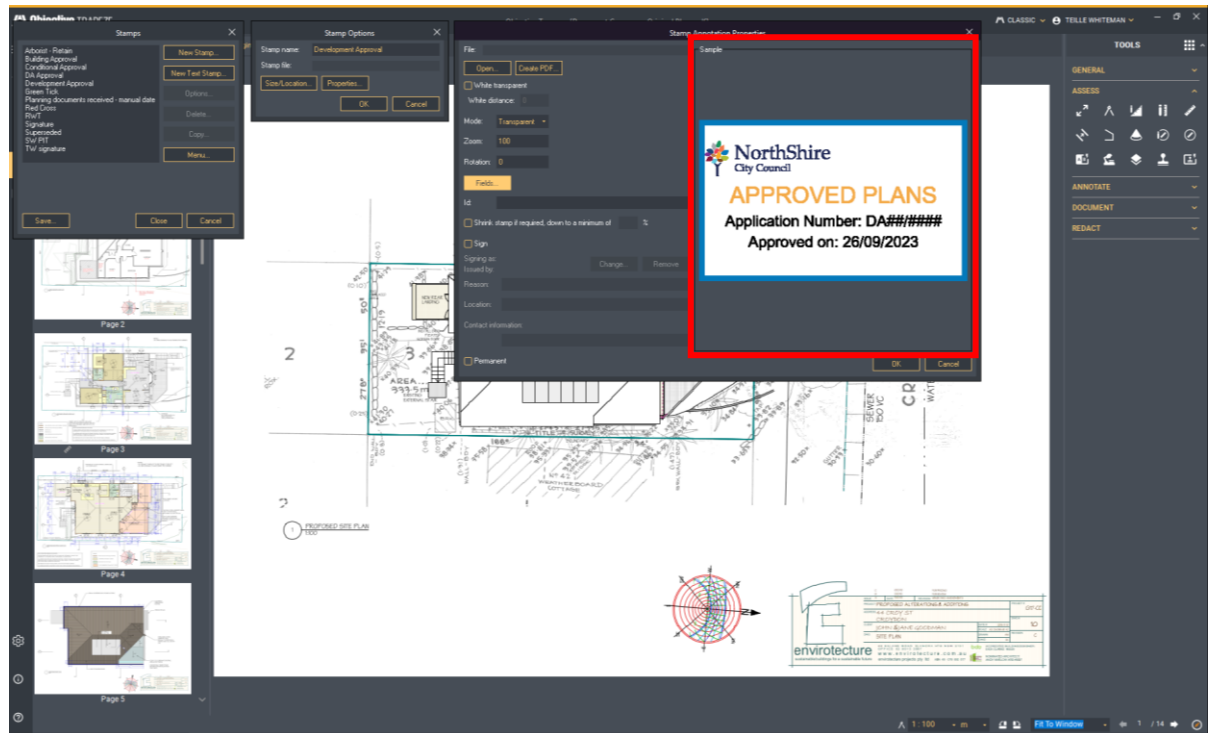

43. Click **Create PDF** to specify a new stamp size or border thickness if there is too much white space around the Text/PDF Fields.
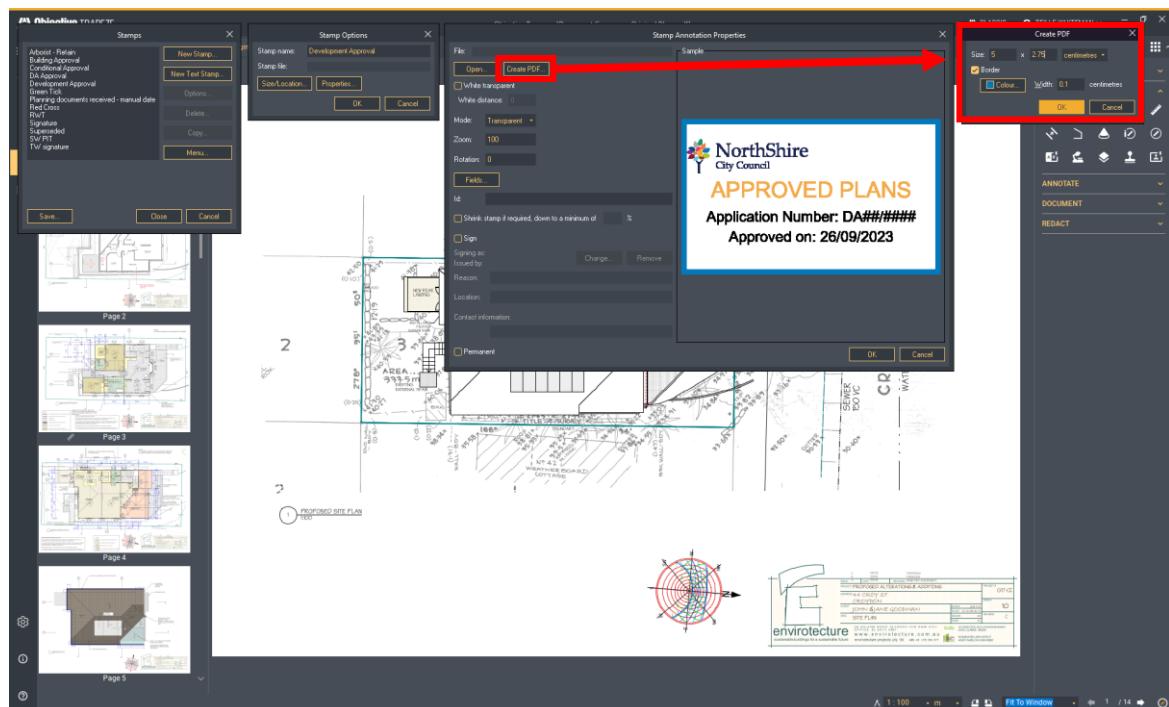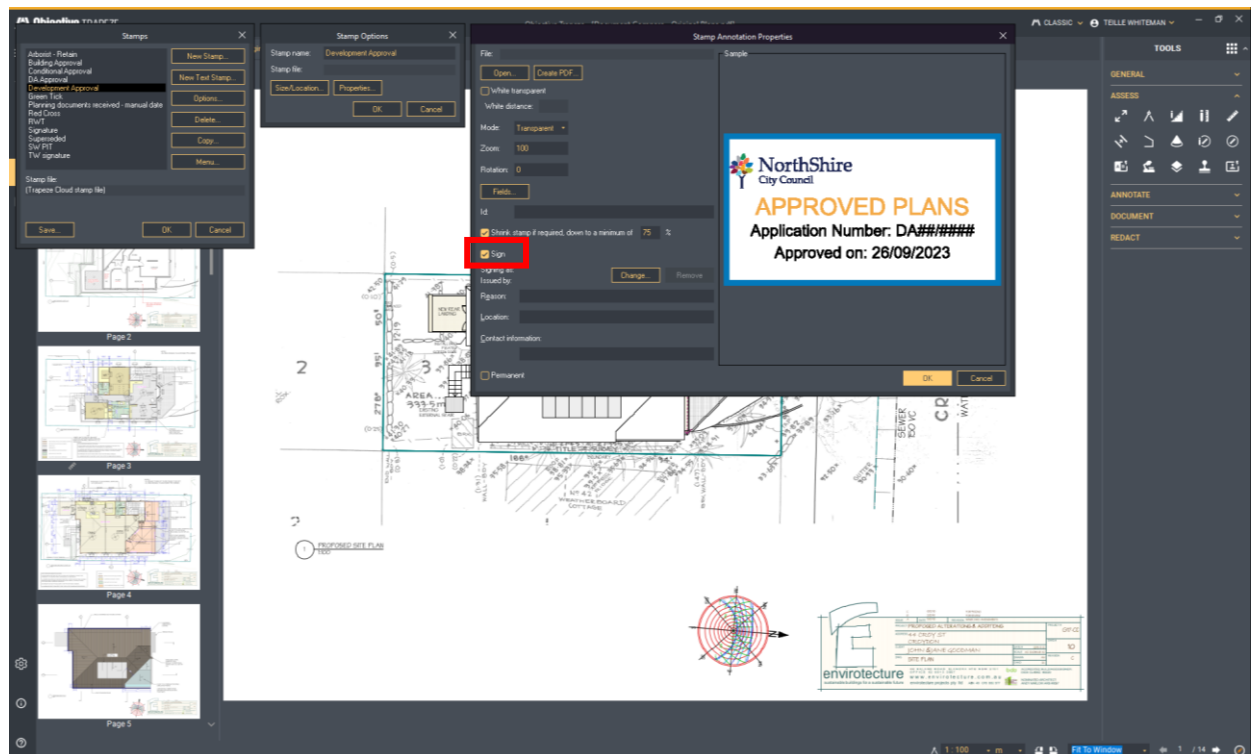
1.5 Configure stamp to shrink down to improve efficiency of Smart Stamp

44. Select **Shrink stamp if required, down to a minimum of** to make the stamp automatically shrink down to fit into blank spaces found by the Smart Stamping Tool. Specifying 75%, for example, means that the stamp will shrink by up to 25% of its original size.
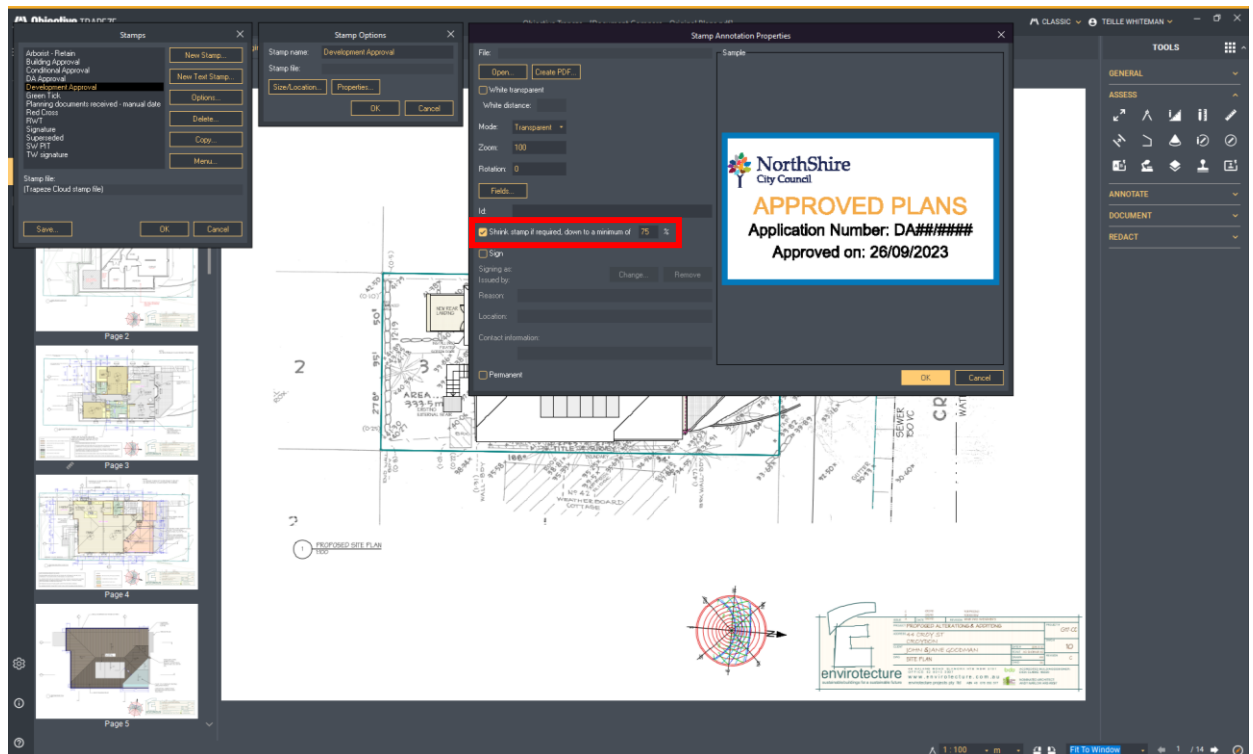
## 1.6   Add a digital signature to a stamp

45. Select **Sign** to add a digital signature to a stamp, provided you have a digital signing certificate in your Windows certificate store.

| Signing preferences	
Signing as	Displays the name of the Certificate in the Windows Store.
Issued by	Displays the name of the Issuer of the Certificate in the Windows Store.
Change button	Selecting this button allows the user the change the Certificate being used for signing.
Reason	Select a reason for signing the document, this is a global setting.
Location	Select a location of the person signing the document, this is a global setting.
Contact information	Select a contact information for the person signing the document, this is a global setting.

Note: A digital signature can be added to an entire document (provided you have a digital signing certificate in your Windows certificate store) by clicking Menu > Edit > Preferences > Signing.

If required, contact Trapeze Support for assistance.
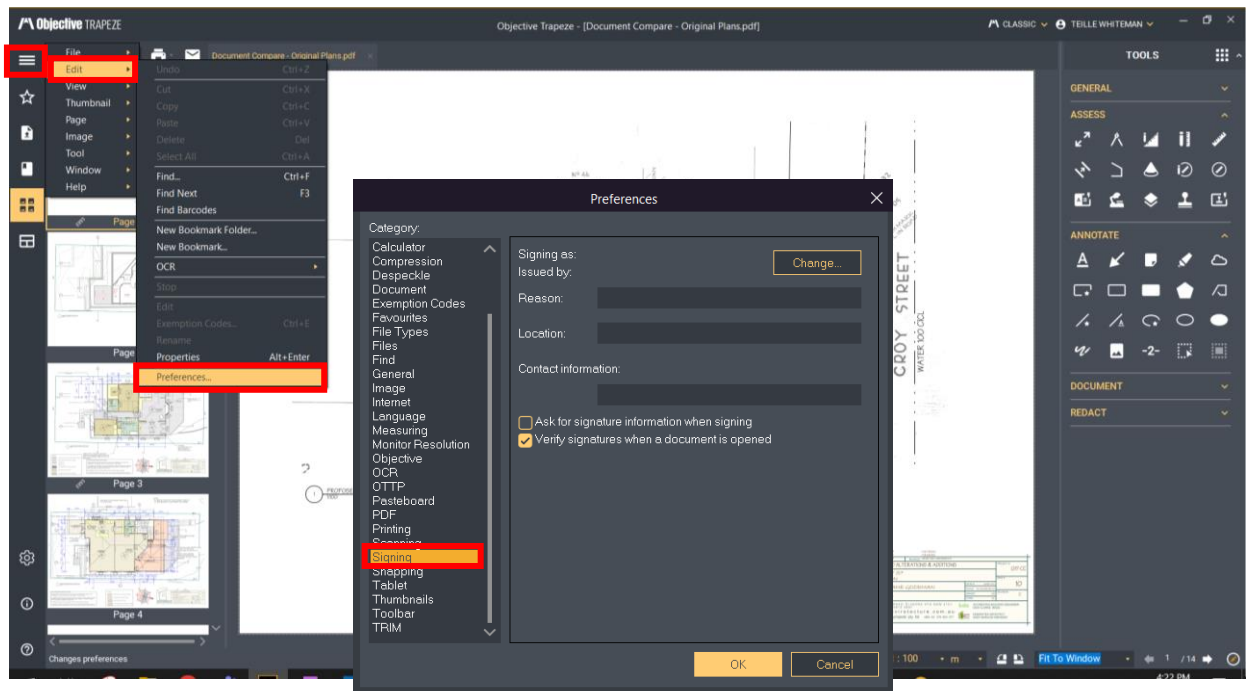
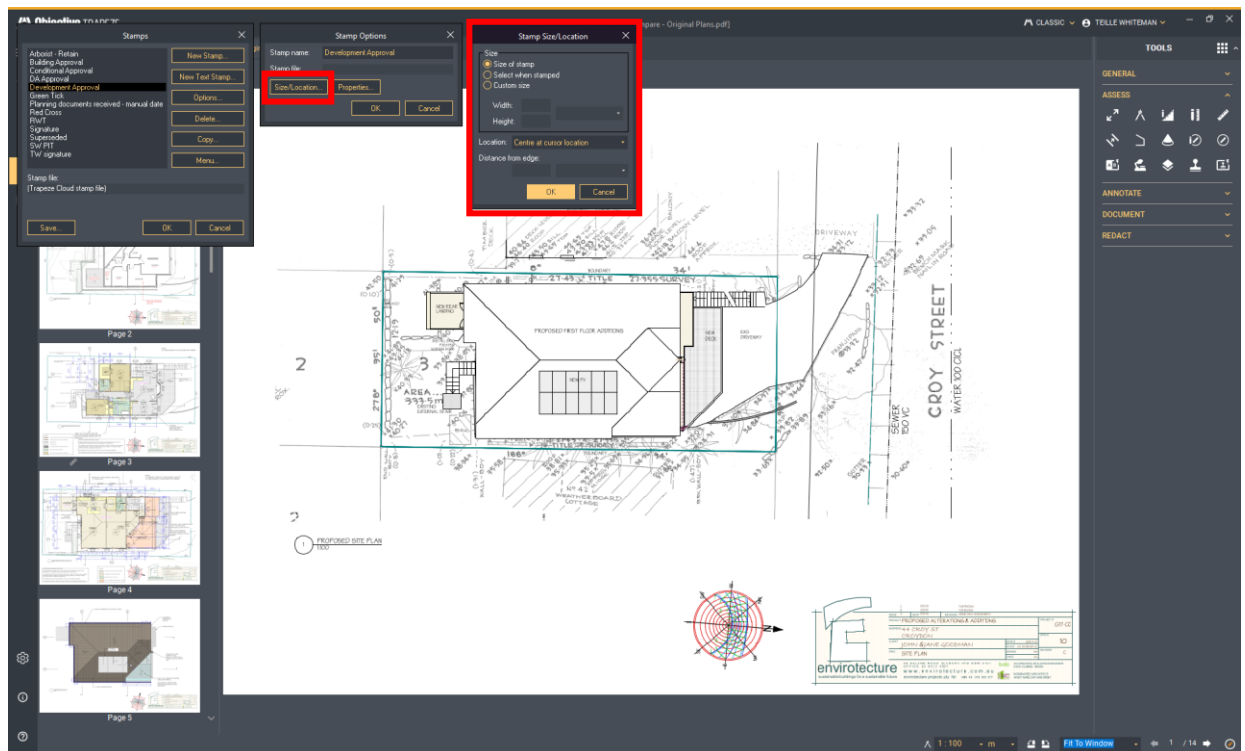46. Select **Permanent** to make a stamp permanent when placed on a page.
Note: This takes away the ability to edit the text or move the stamp to a new location using Trapeze. It is advised that this is left unticked as users can save the stamp as permanent at a later stage.
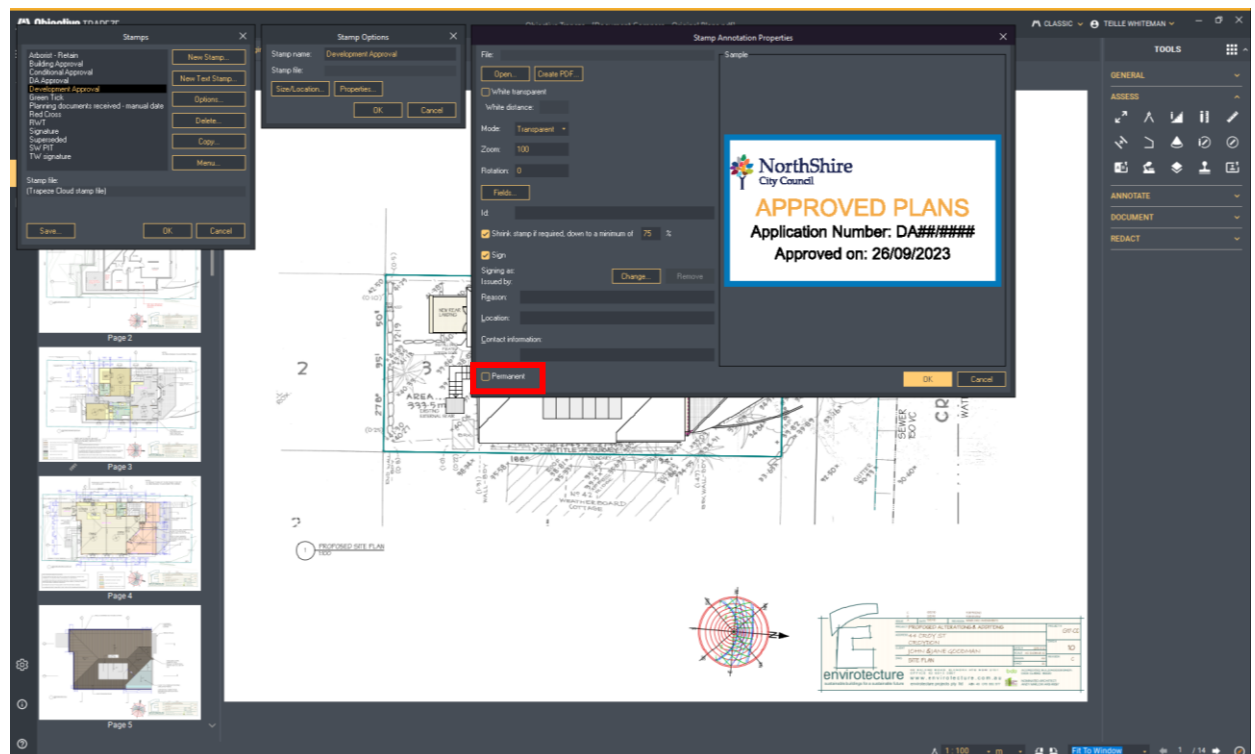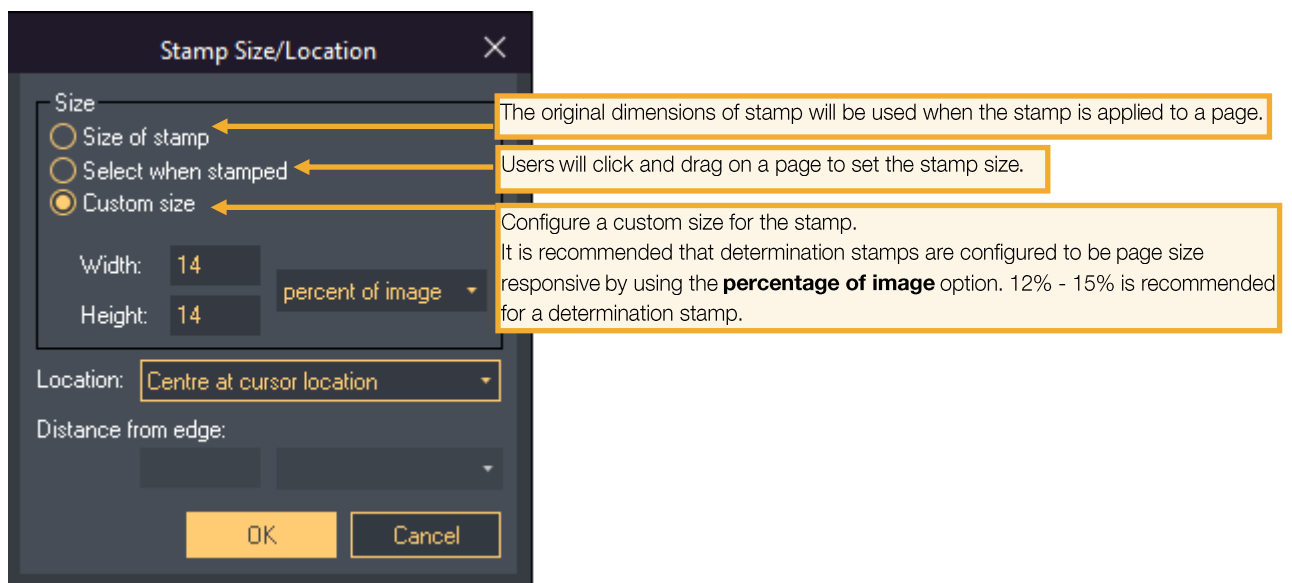

47. Click **OK** on the **Stamp Annotation Properties** to return to the **Stamp Options** window.

## 1.7 To configure stamp size and location on when applied on a page

48. Click **Size/Location** to open the **Stamp Size/Location** window.

49. Select the default size requirements for when the stamp is stamped on a page.

The original dimensions of stamp will be used when the stamp is applied to a page.

Users will click and drag on a page to set the stamp size.

Configure a custom size for the stamp.
It is recommended that determination stamps are configured to be page size responsive by using the **percentage of image** option. 12% - 15% is recommended for a determination stamp.

50. Select **Location** of stamp to control where the stamp is applied on the page. If desired, input a **Distance from edge** of the page. Click **OK** to return to the Stamp Options window.
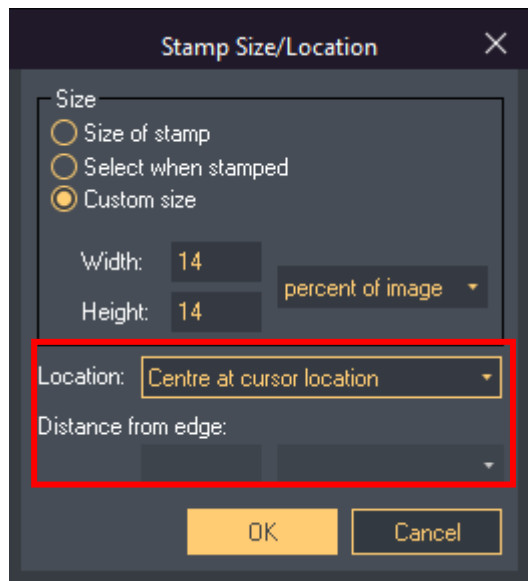
51. Click **OK** to return to the **Stamps** window.

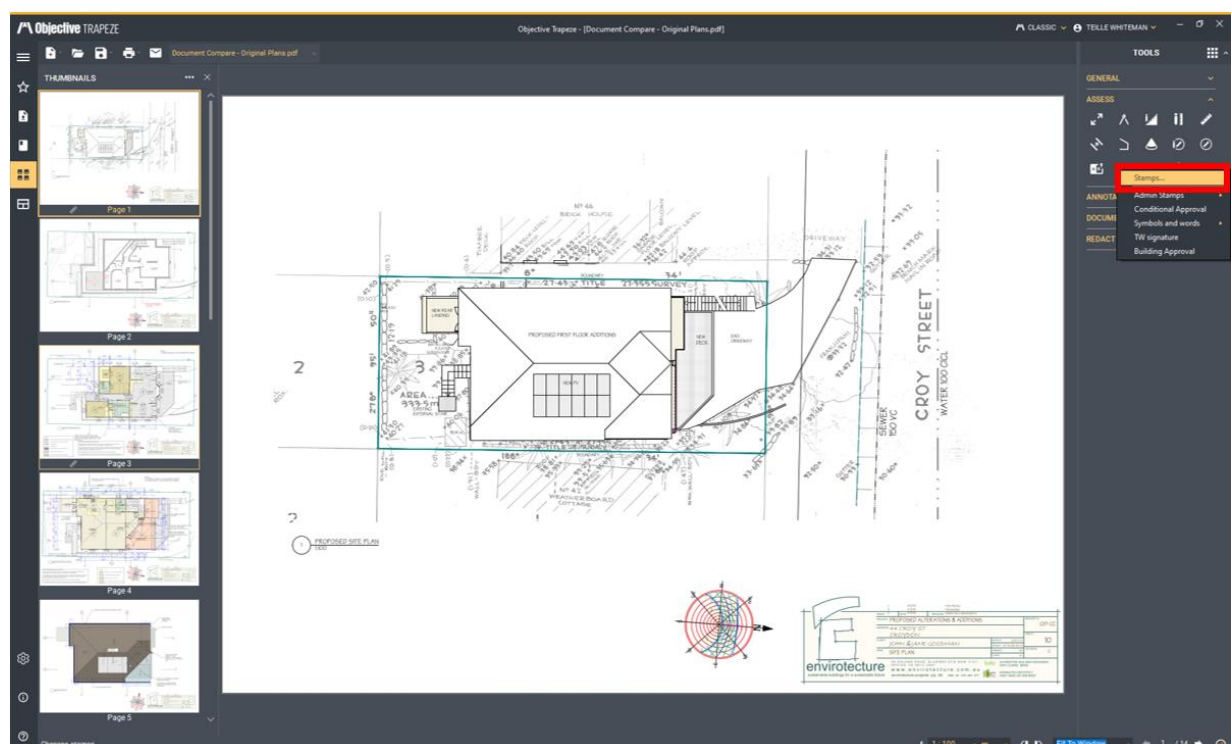52. Click **OK** to return to the open document and test the stamp.
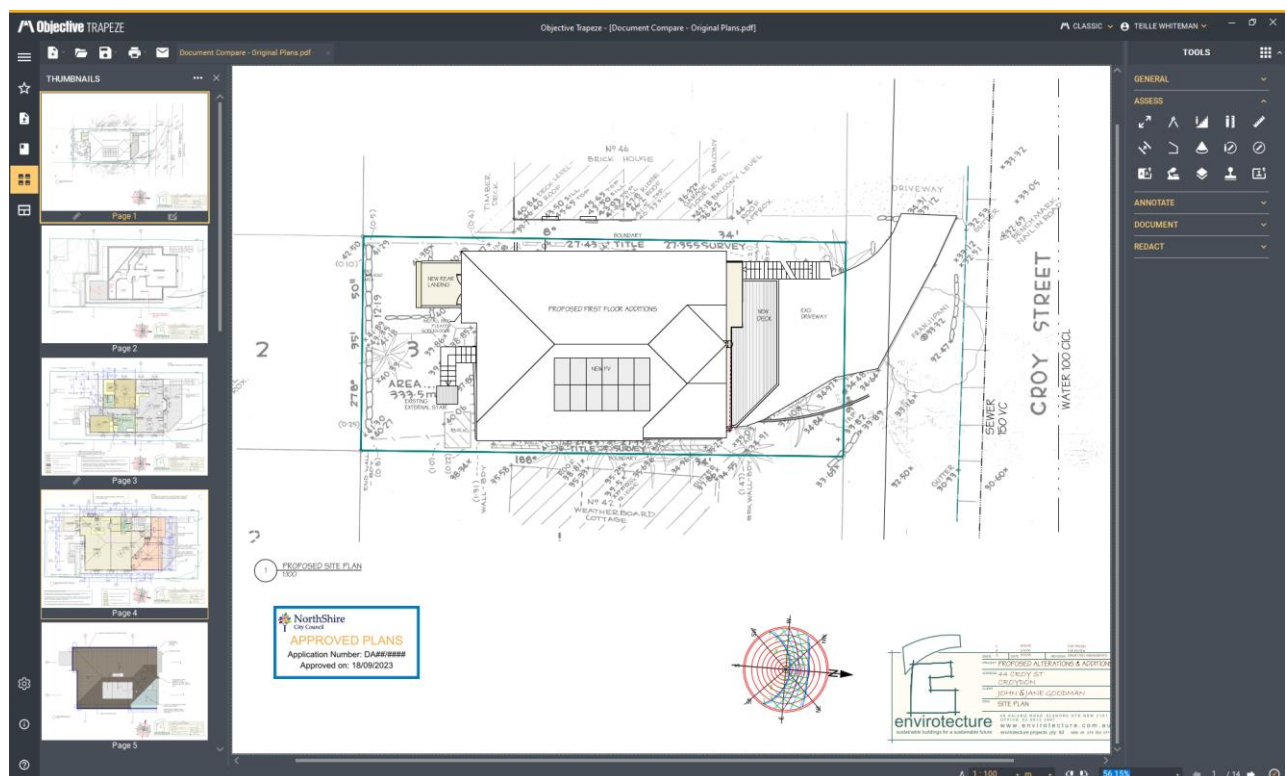
1.8   To modify the properties or size/location of a stamp

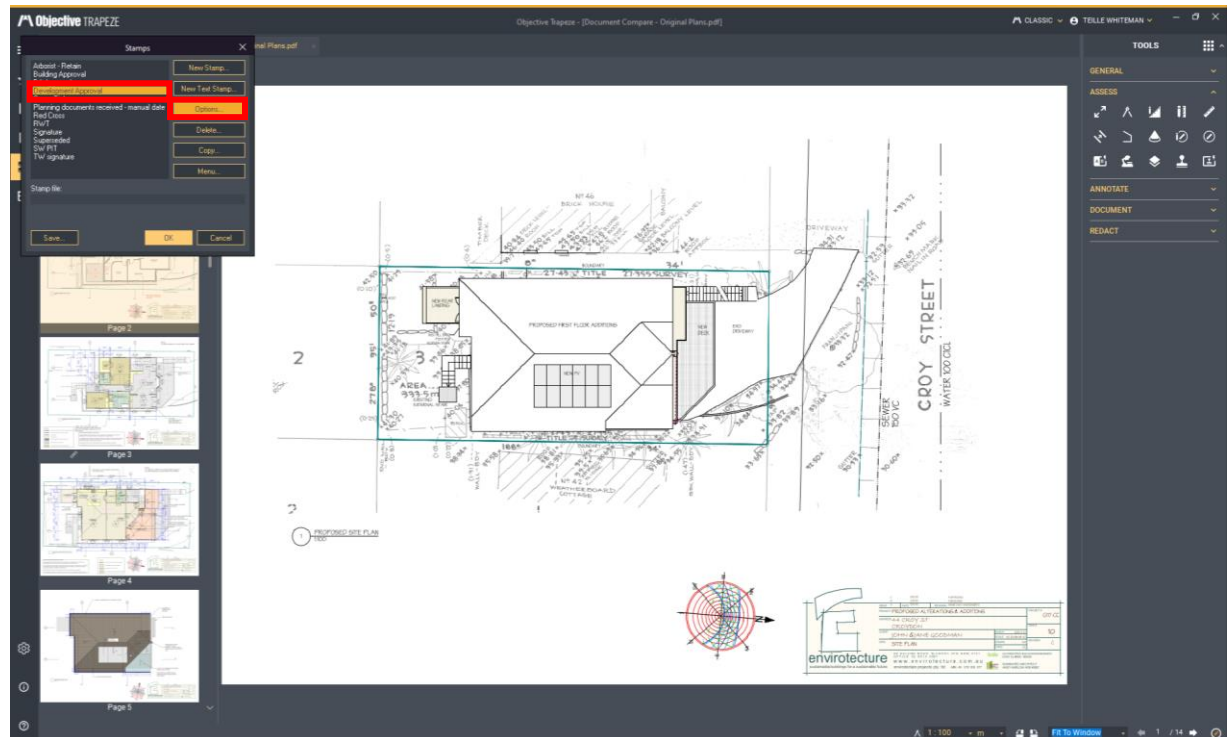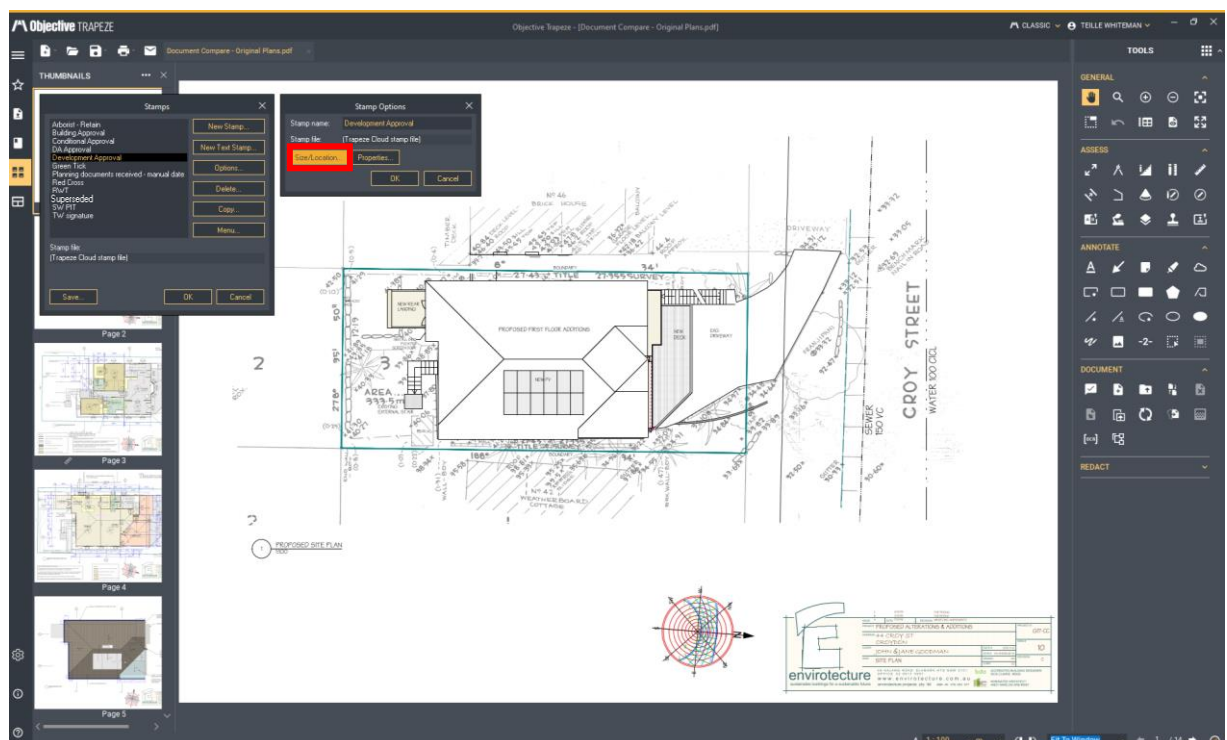53. Click the **Stamp Annotation Tool** from the **Assess Toolset**.
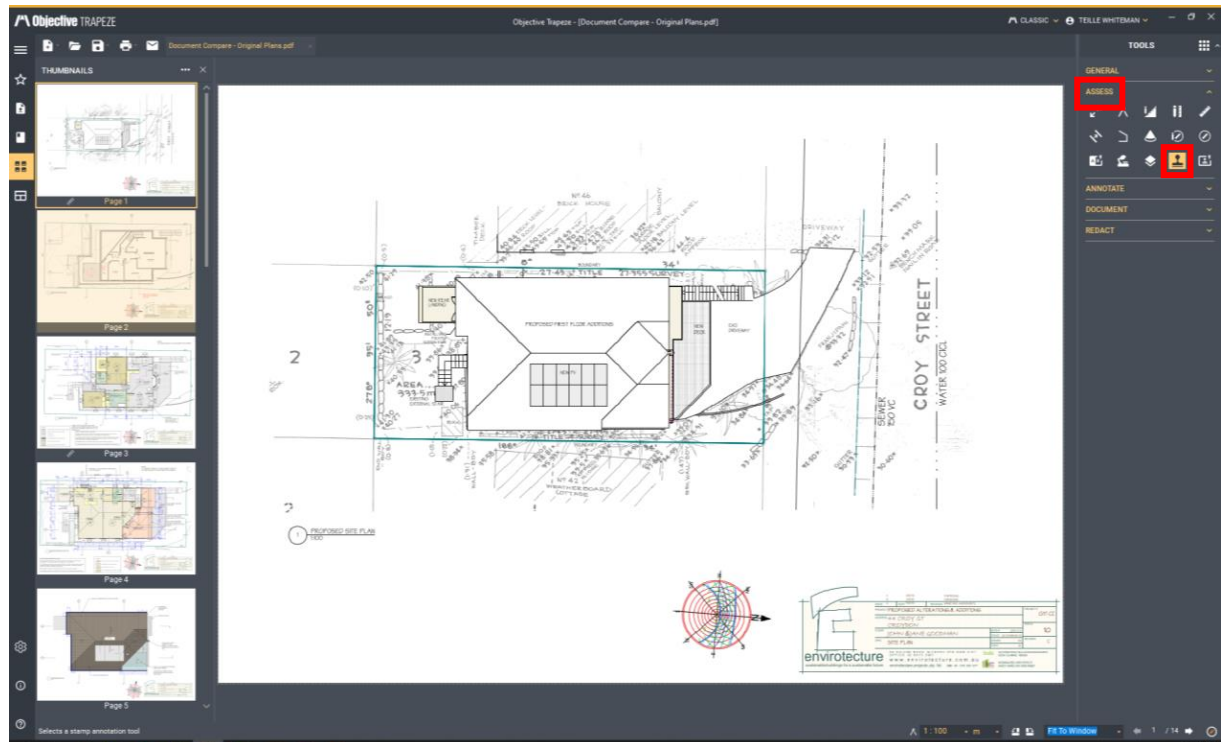
54. Click **Stamps** to open the **Stamps** window.

55. Select the stamp to be modified and then click **Options** to open the **Stamp Options** window.
Note: Some stamps may appear as read-only if they have been shared by a stamp administrator. Please contact the stamp administration in the organisation to modify the stamp.

56. Click **Size/Location** to change the size or location of the stamp (see steps 48 - 51).

57. Click **Properties** to edit the properties of the stamp including content in PDF Field or Text Field (see sections 1.2 – 1.6 above for detailed instructions).
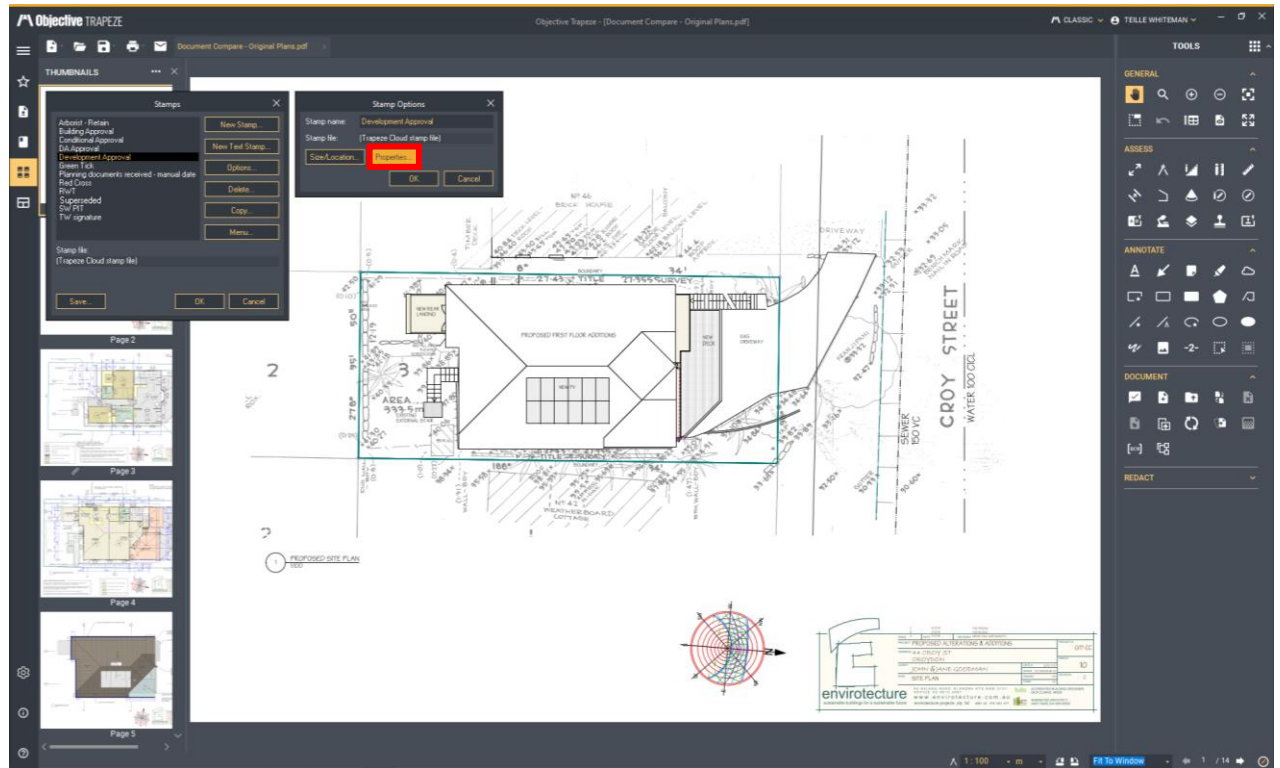
1.9 Copy stamp to use as template for a new stamp

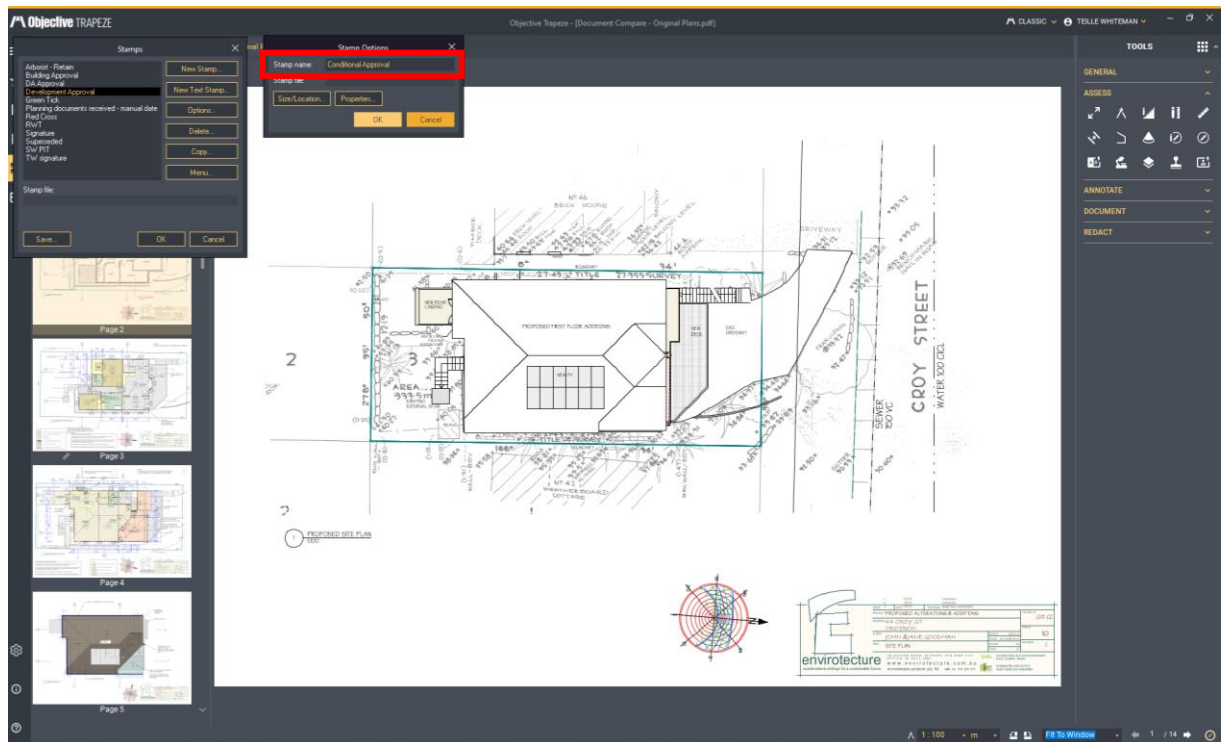58. Click the **Stamp Annotation Tool** from the **Assess Toolset.**
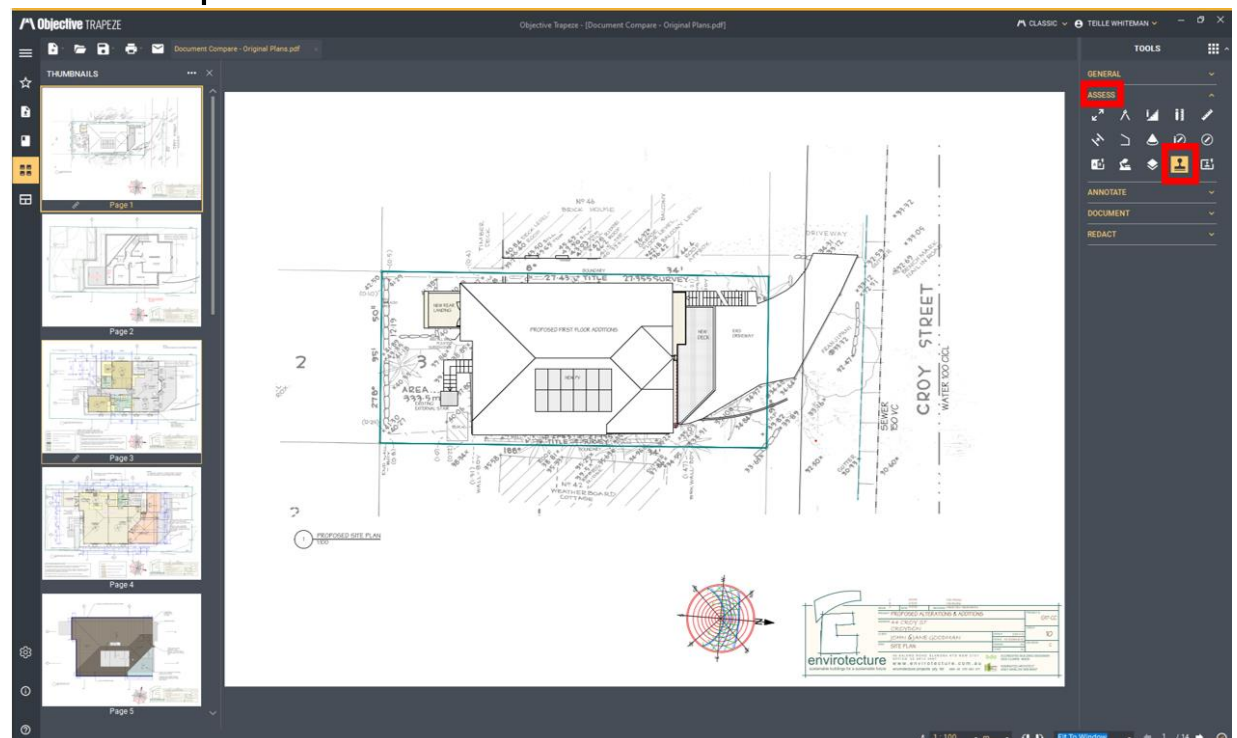
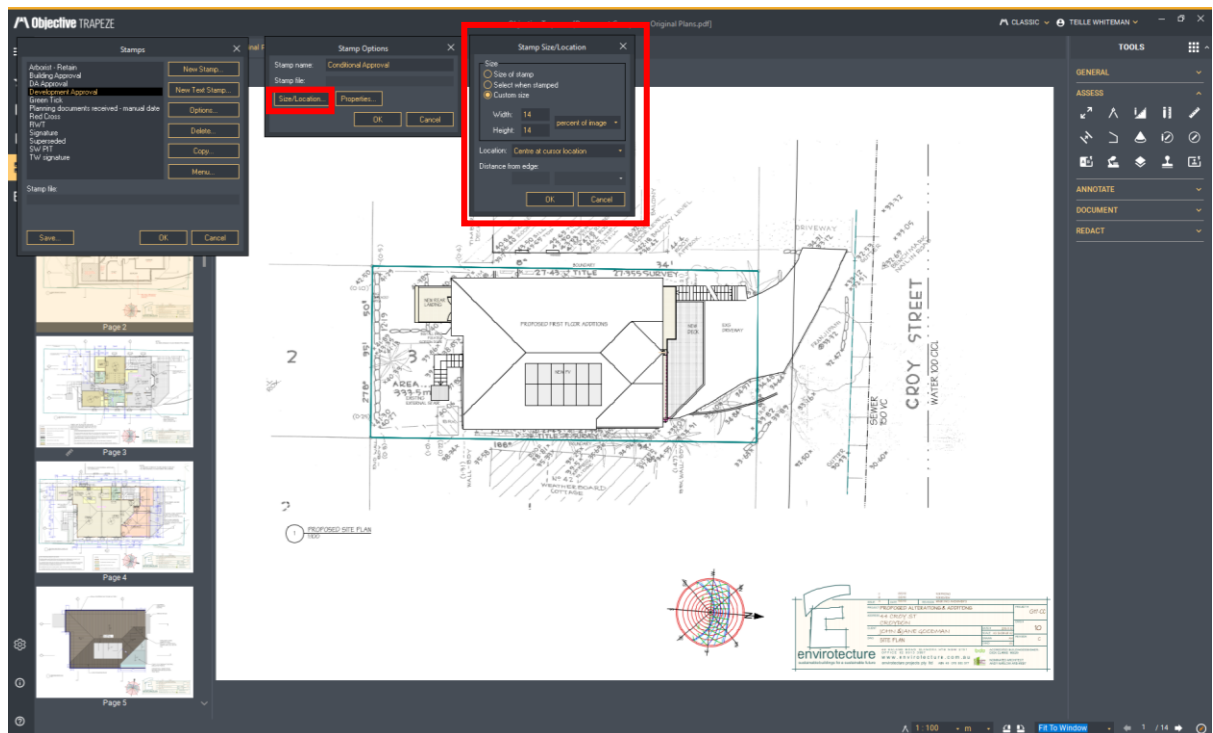59. Select **Stamps** to open the **Stamps** window.
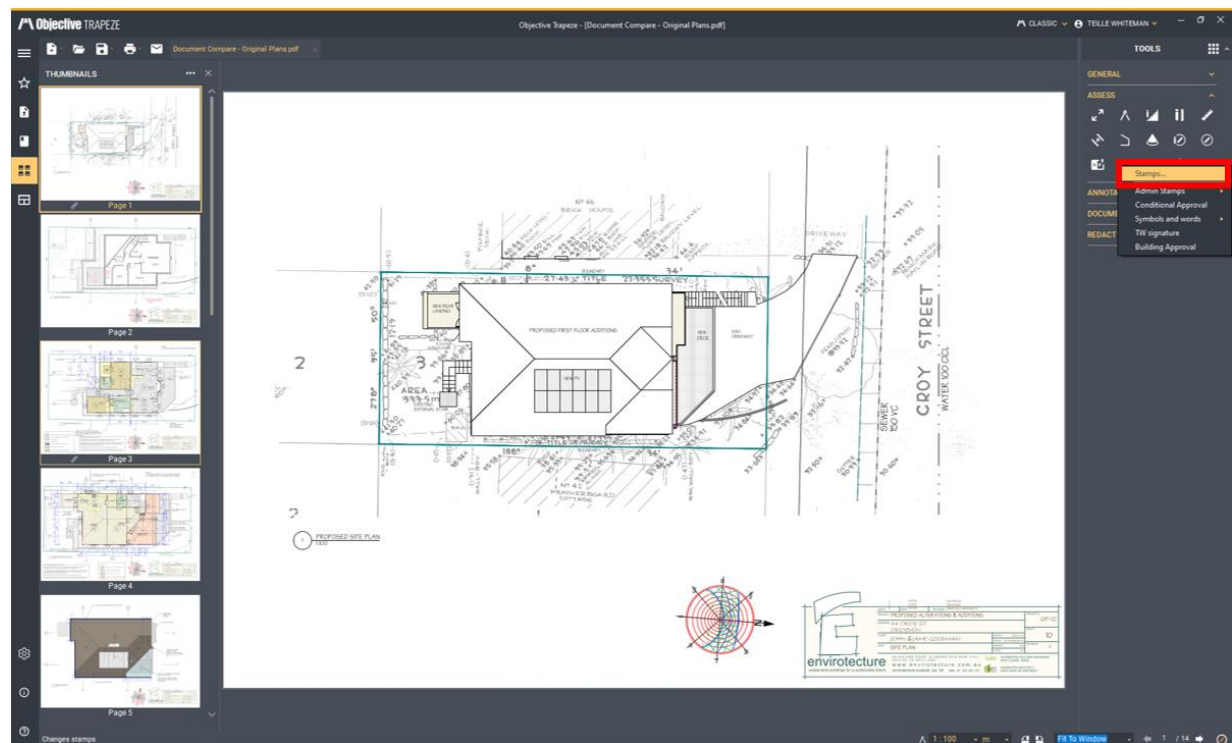
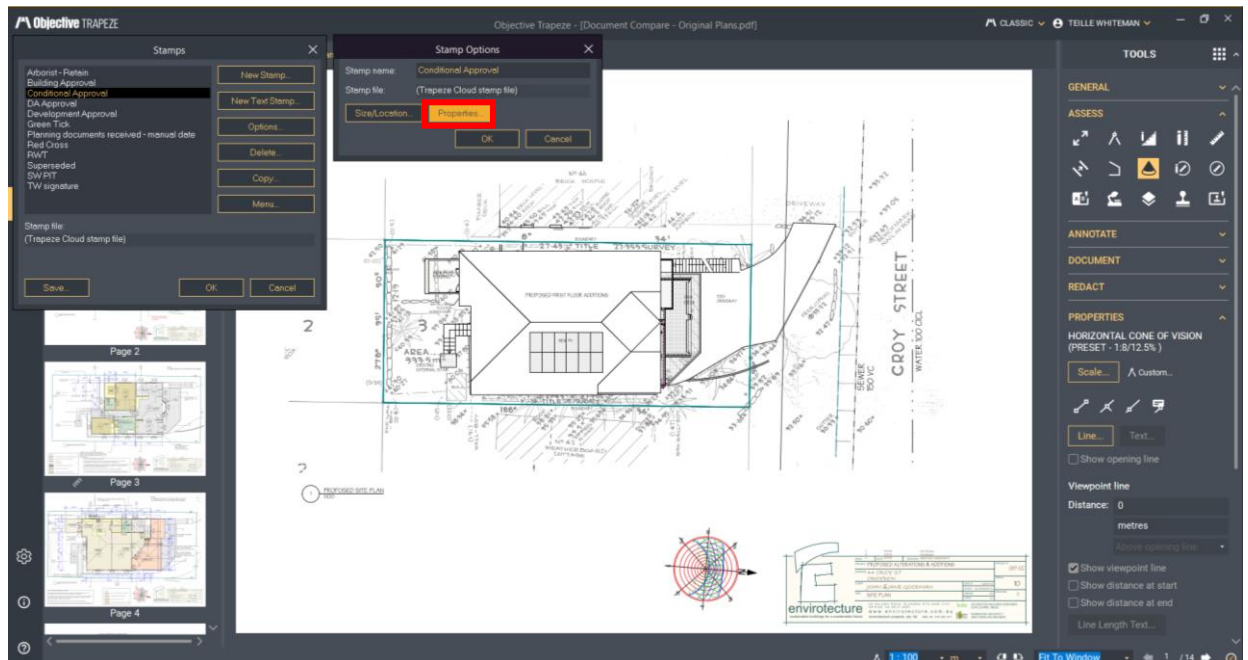60. Select the stamp to be used as a template and then click **Copy.**
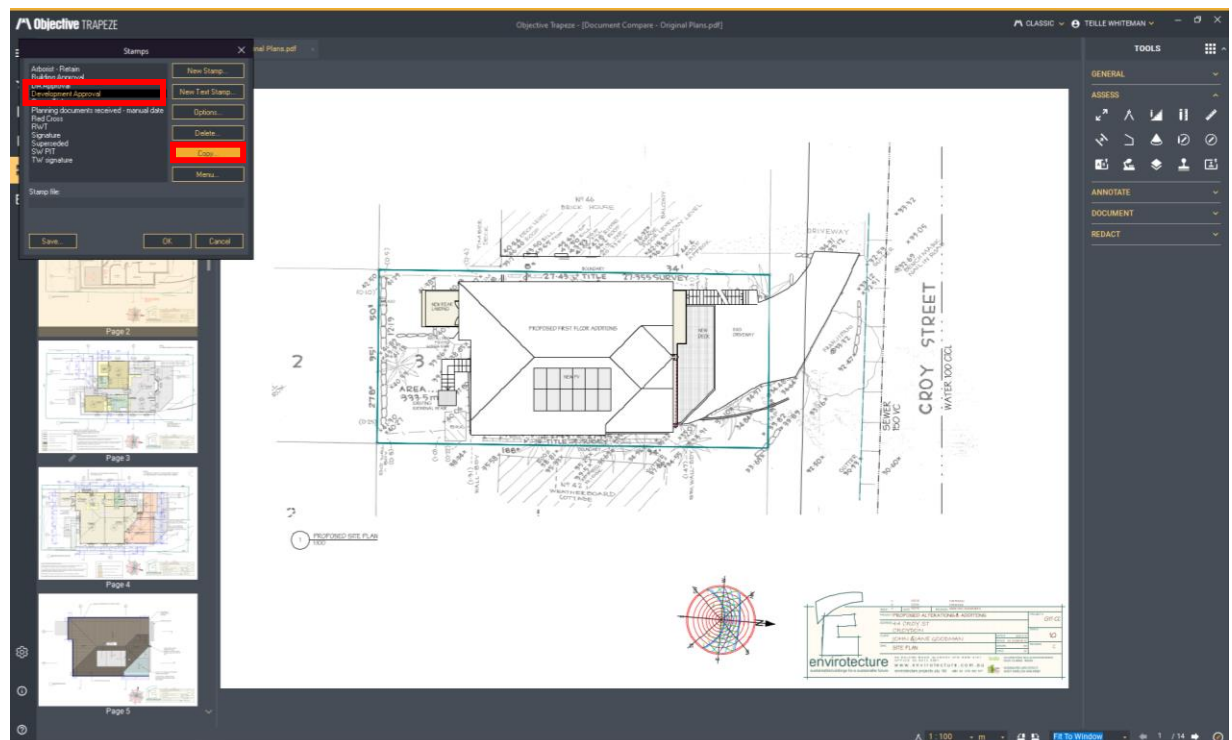
61. Type a name for the new stamp in the **Stamp name** field.

62. Click **Size/Location** to modify as required (see Section 1.7). Then Click **OK** to return to the **Stamps Options** window.
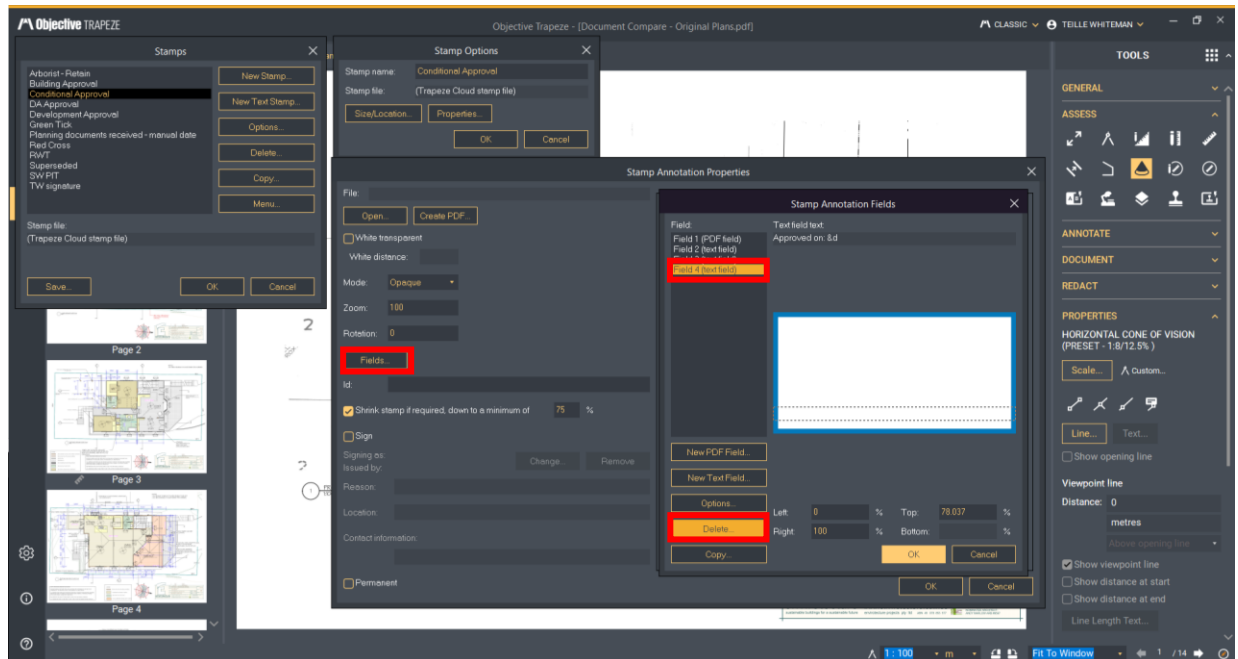
63. Click **Properties** to modify/delete the PDF Field or Text Field.

64. To modify the fields either double click the field in the Sample area or click **Fields**. Change properties as required (refer to sections 1.2 –1.4 above for detailed instructions).
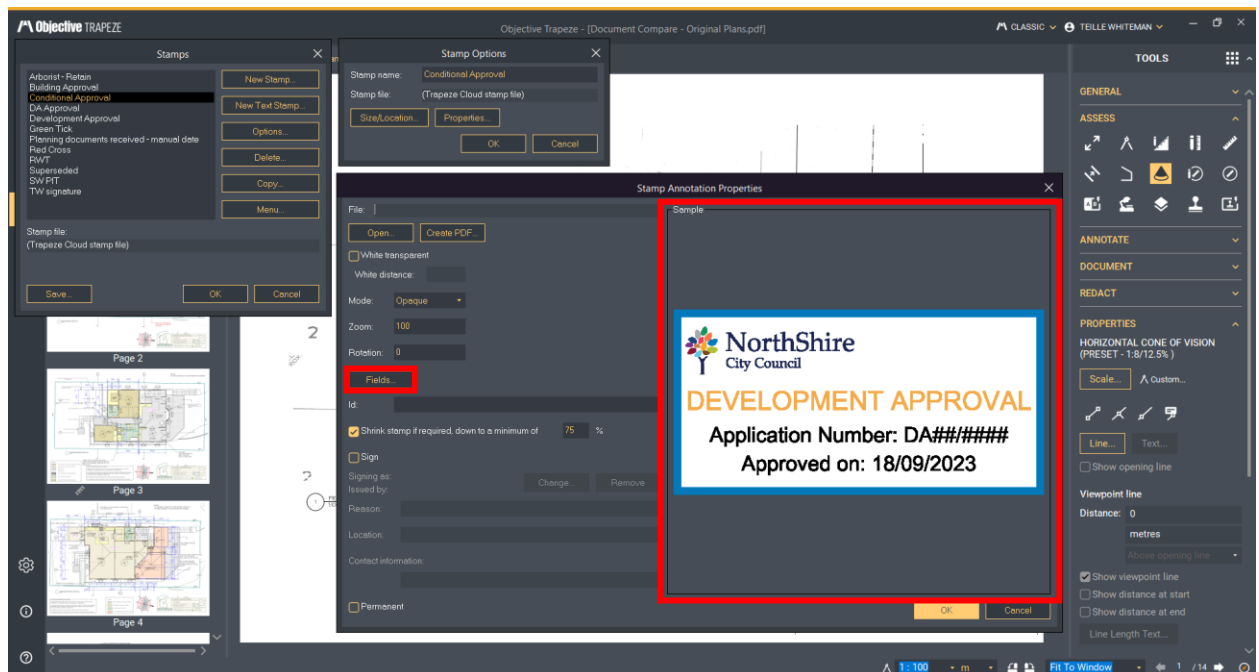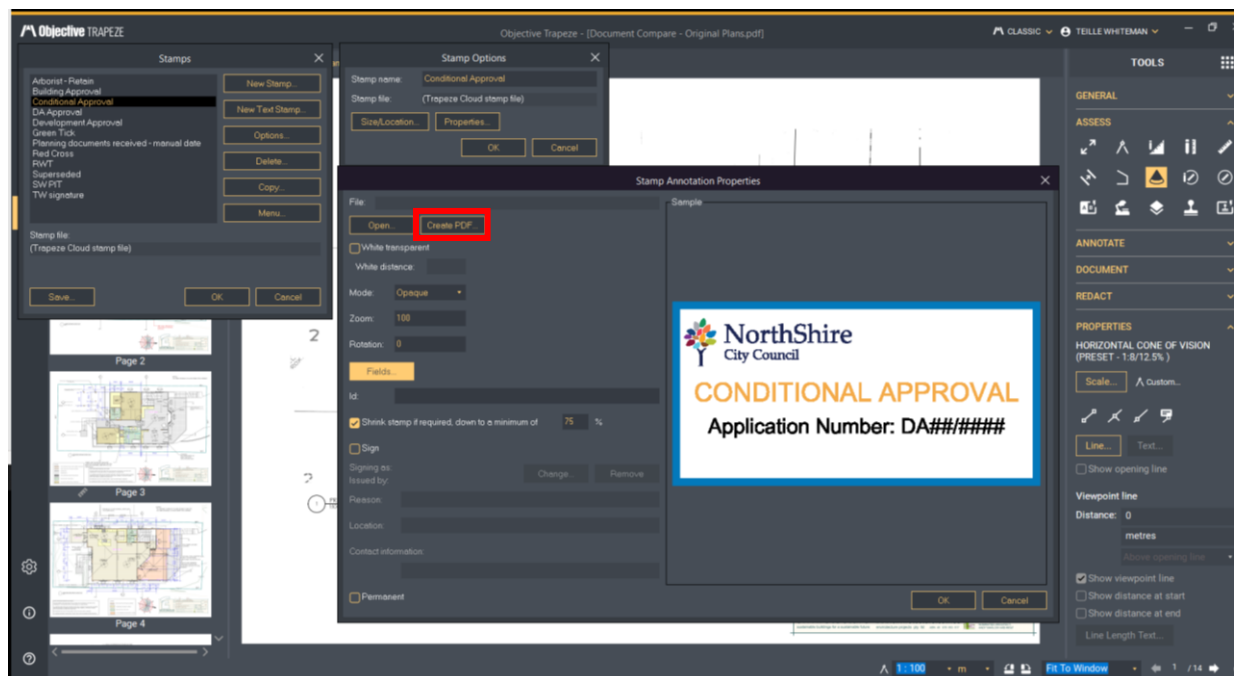
65. To delete a field, click **Fields**, select the field to be deleted and then click **Delete**.
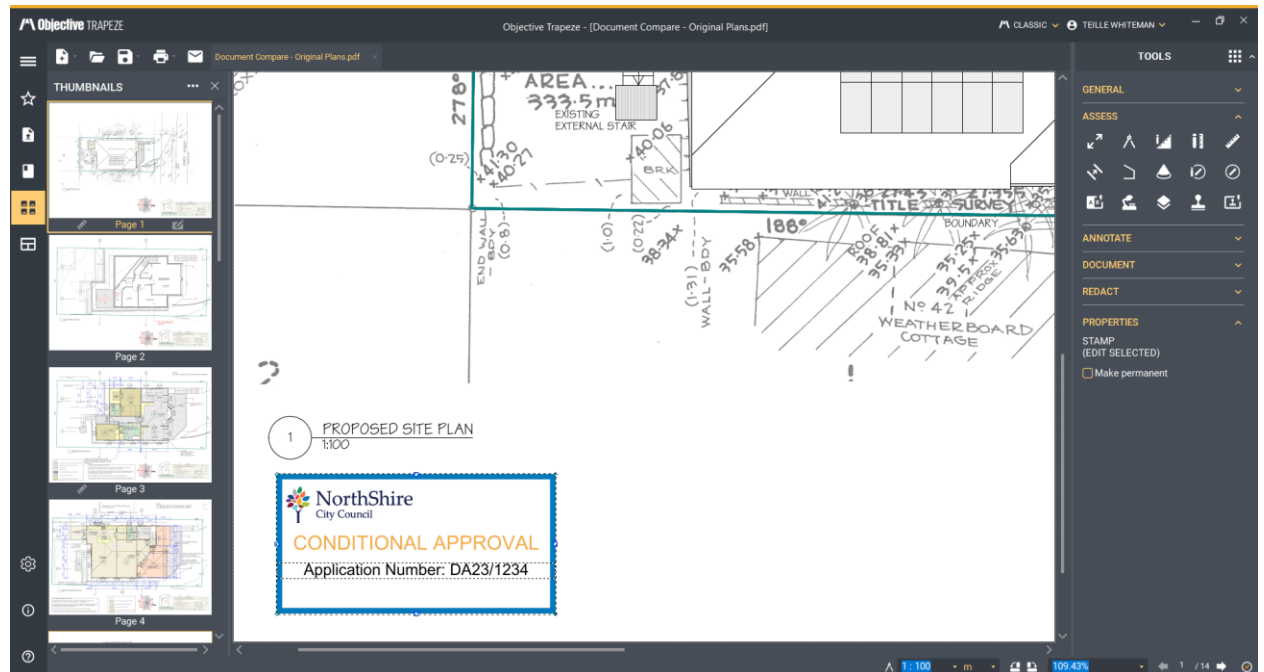

66. Click **OK** to return to Stamp Annotation Properties window.

Note: Click **Create PDF** to change the proportions of the stamp if required.

67. Click **OK** on all windows and test stamp.

Creating stamps for electronic signatures, symbols or words

Stamps provide a consistent set of electronic content that can be inserted into a file using Objective Trapeze. Stamps may include text, images (SVG, AI or PDF Files supported) or metadata from other systems.
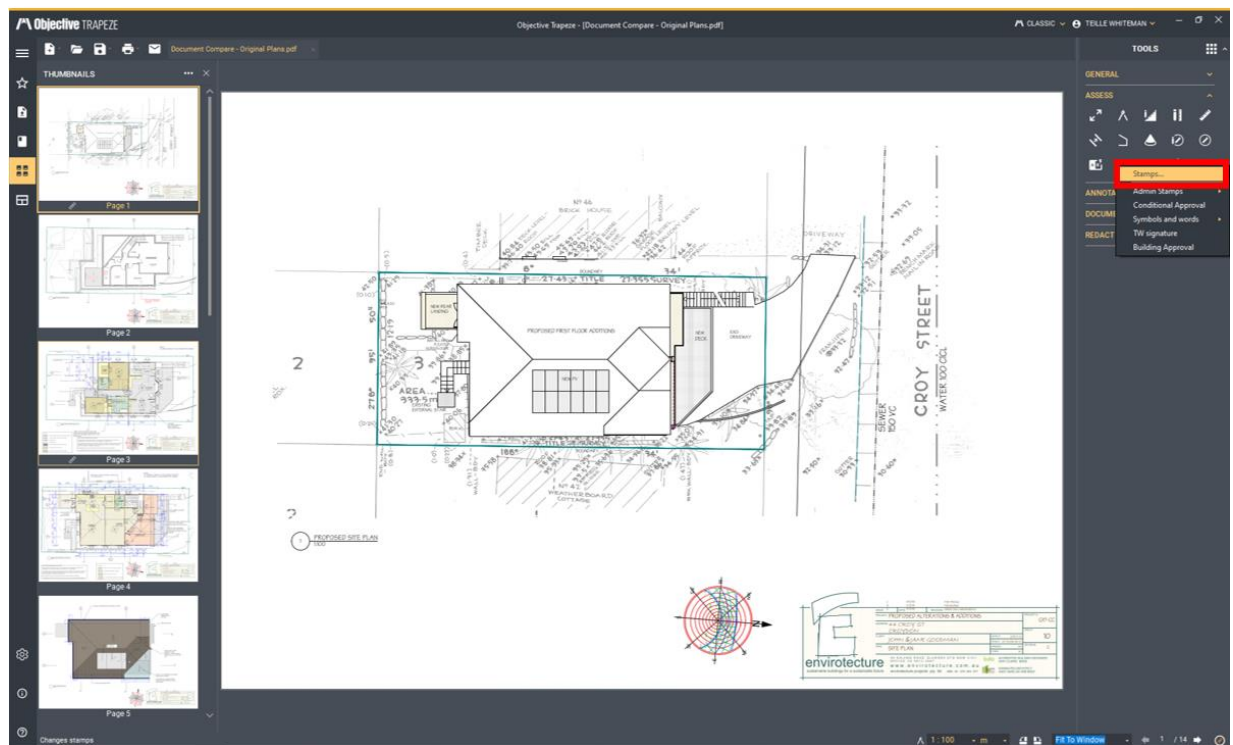
This section of our guide outlines the steps in creating a stamp of an electronic signature and commonly used symbols/icons or words.

1.1   Creating an electronic signature stamp or symbol/icon
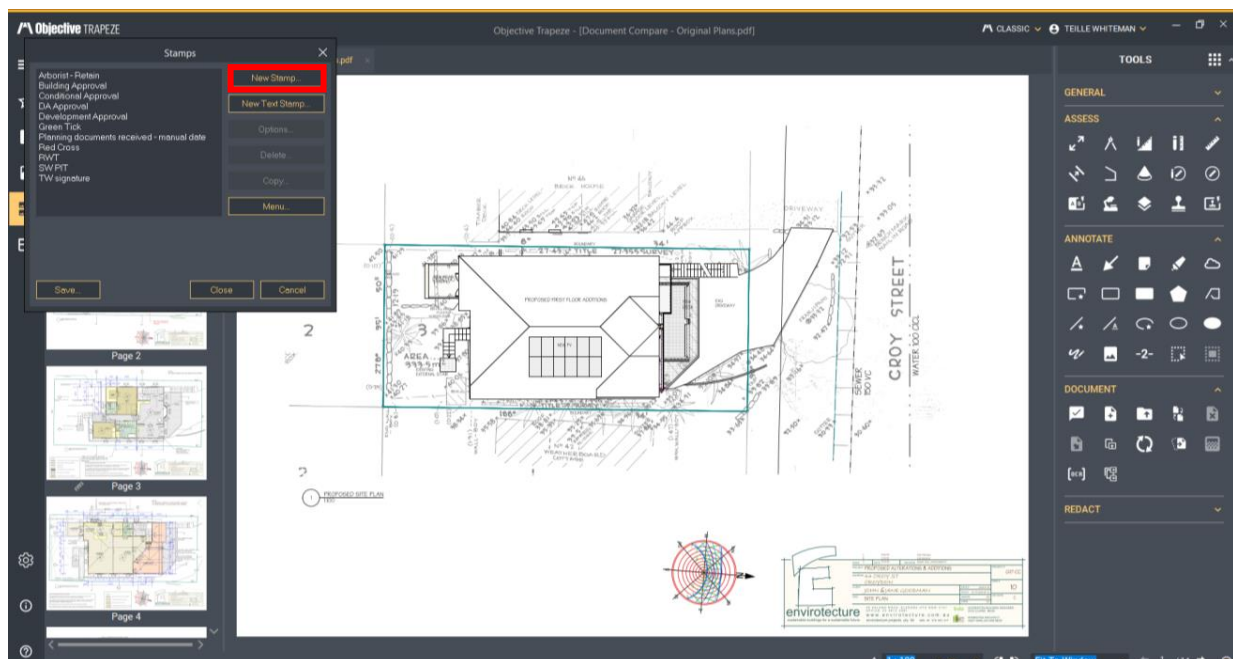
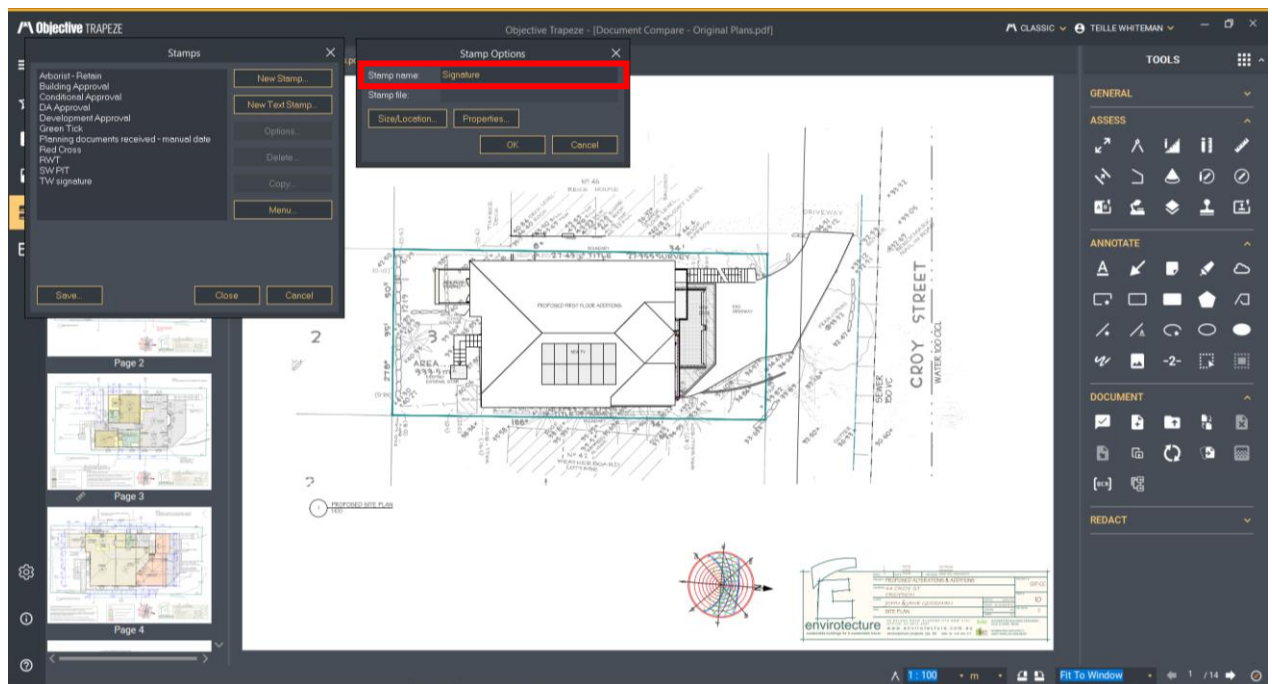1. Click the **Stamp Annotation Tool** from the **Assess Toolset**.
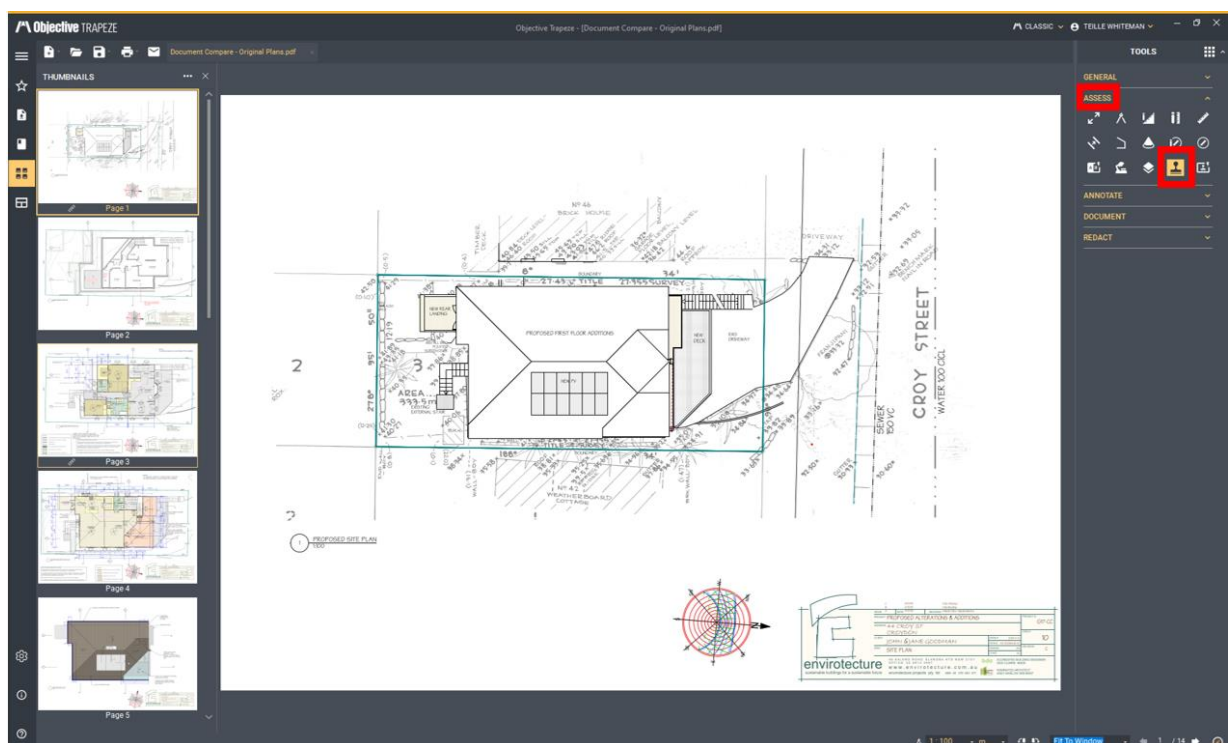
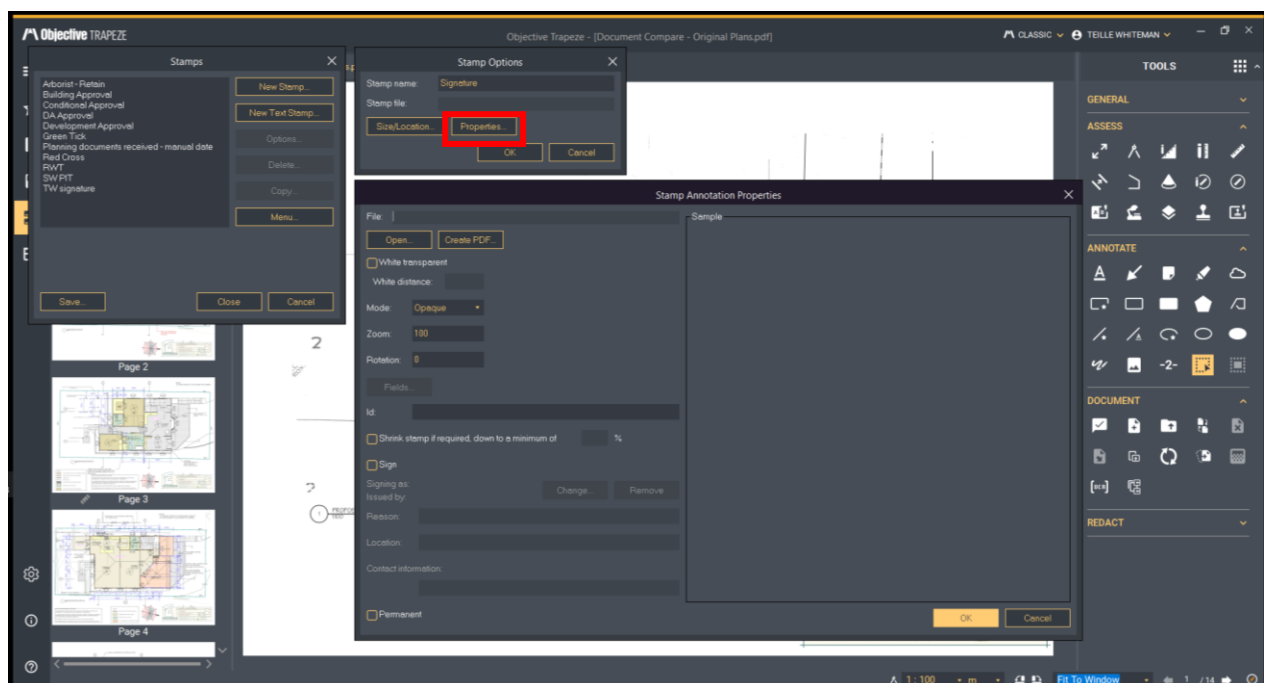2. Select **Stamps** to open the **Stamps** window.

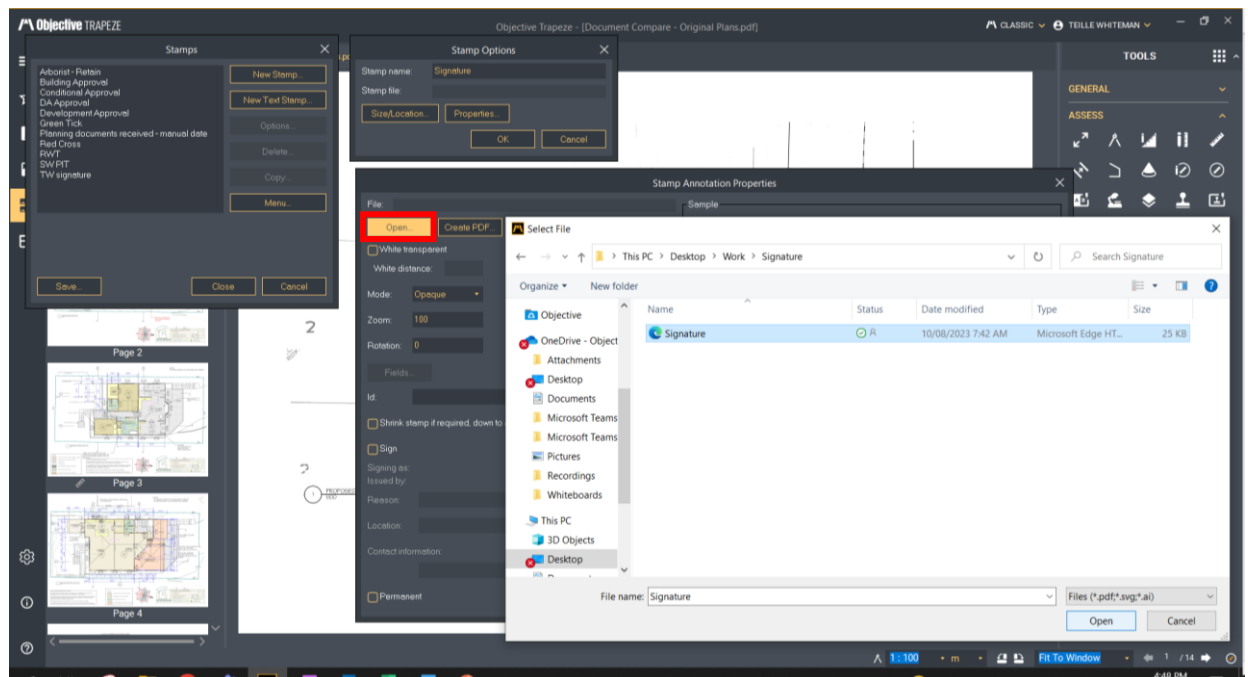3. Click **New Stamp** to open the **Stamp Options** window.

4. Type a name for the new stamp in the **Stamp name** field.

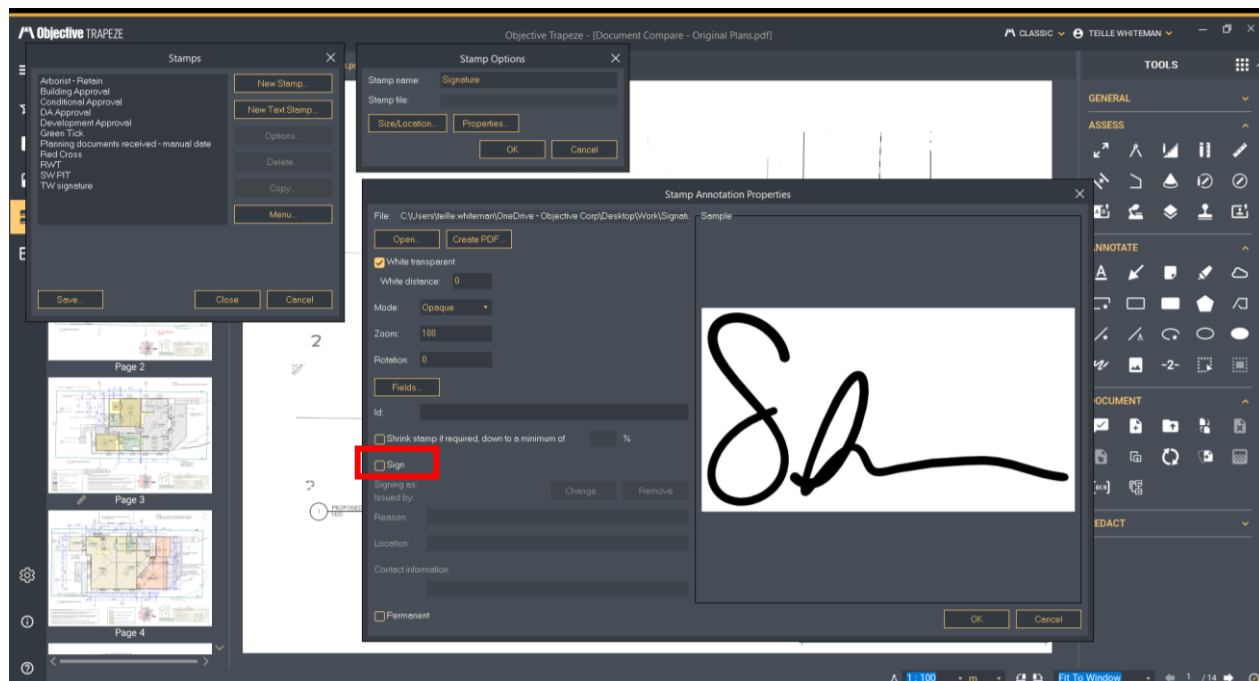5. Click **Properties** to open the **Stamp Annotation Properties** window.

6. Click **Open** to upload a picture of a signature, SVG if the recommended format. Please contact Trapeze Support if you require assistance.

7. Select make **White transparent** so the background is transparent.

8. Select **Mode**, **Zoom** and **Rotation** as required (see screenshot below for recommended settings).
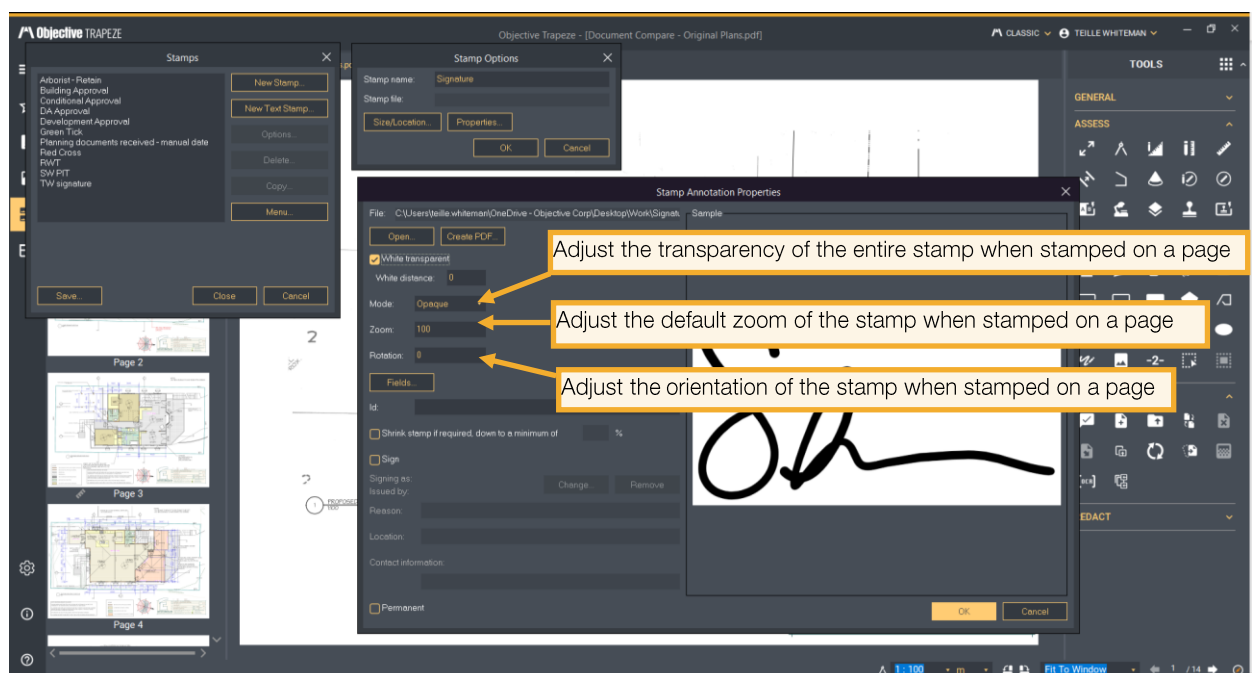
9. Select **Sign** to add a digital signature to a stamp for additional security, provided you have a digital signing certificate in your Windows certificate store. Please contact Trapeze Support if you require assistance.

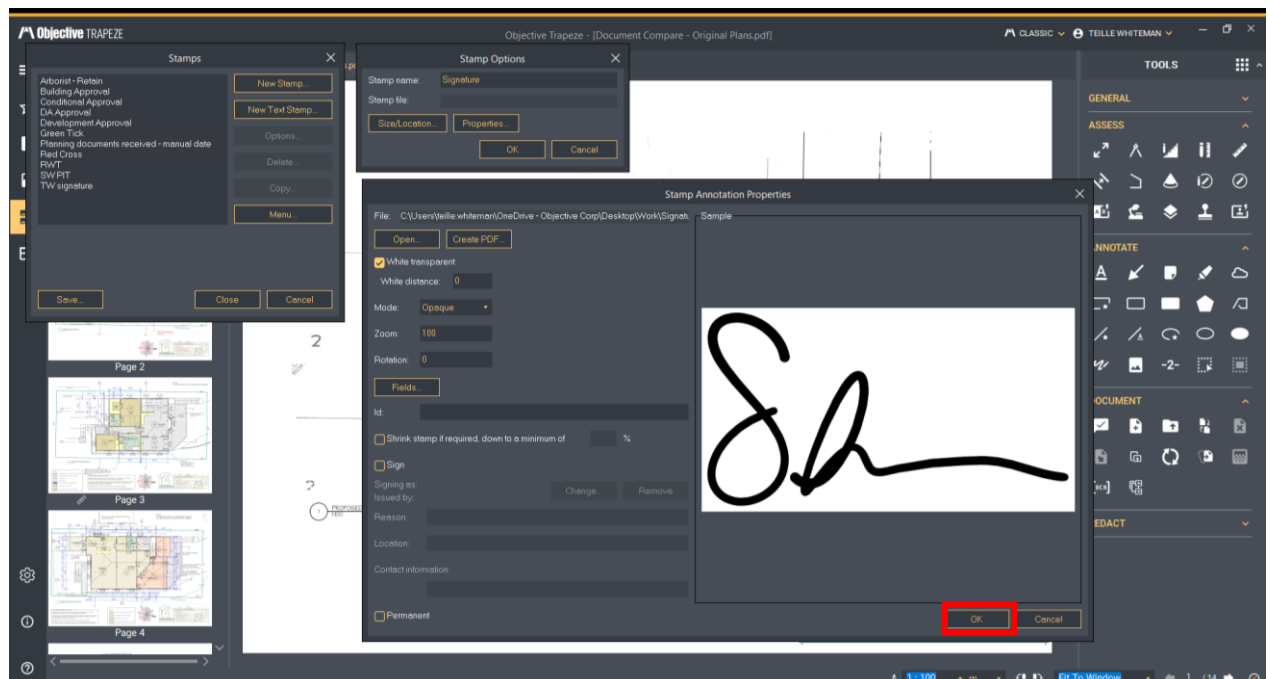| Signing preferences	
Signing as	Displays the name of the Certificate in the Windows Store.
Issued by	Displays the name of the Issuer of the Certificate in the Windows Store.
Change button	Selecting this button allows the user the change the Certificate being used for signing.
Reason	Select a reason for signing the document, this is a global setting.
Location	Select a location of the person signing the document, this is a global setting.
Contact information	Select a contact information for the person signing the document, this is a global setting.

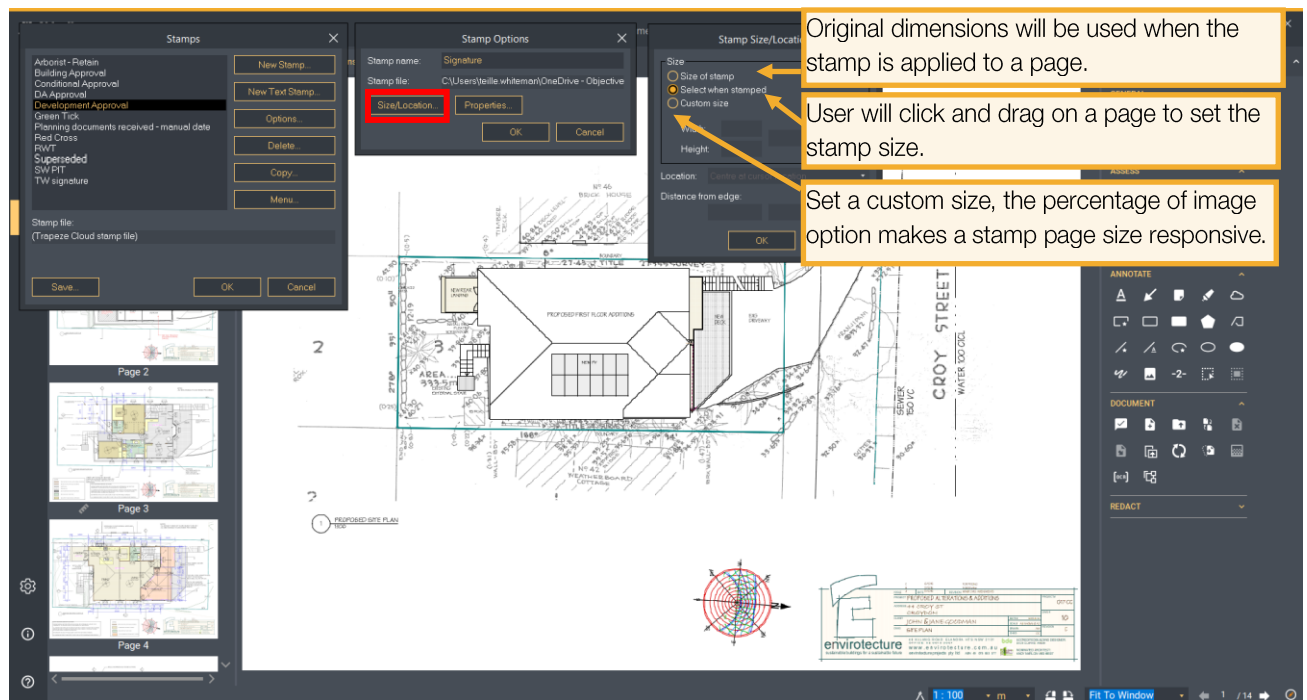10. Select **Permanent** to make a stamp permanent when placed on a page.

   Note: This takes away the ability to delete or move it to a new location using Trapeze. It is advised that this is left unticked as the stamp can be saved as permanent by the user at a later stage.
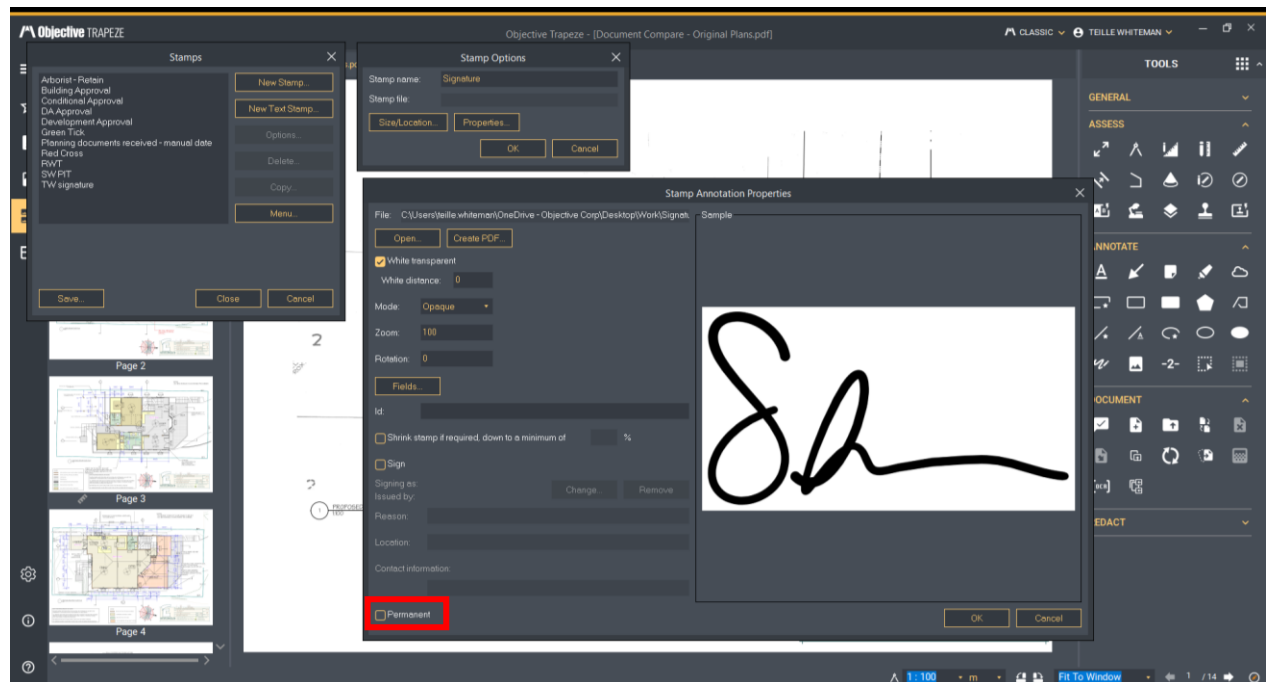

11. Click **OK** on the **Stamp Annotation Properties** to return to the **Stamp Options** window.

12. Click **Size/Location** and select **Size** preferences.

Original dimensions will be used when the stamp is applied to a page.

User will click and drag on a page to set the stamp size.

Set a custom size, the percentage of image option makes a stamp page size responsive.

13. Select the stamps default **Location** and **Distance from edge** of the page (optional). Click **OK** to return to the **Stamp Options** window.
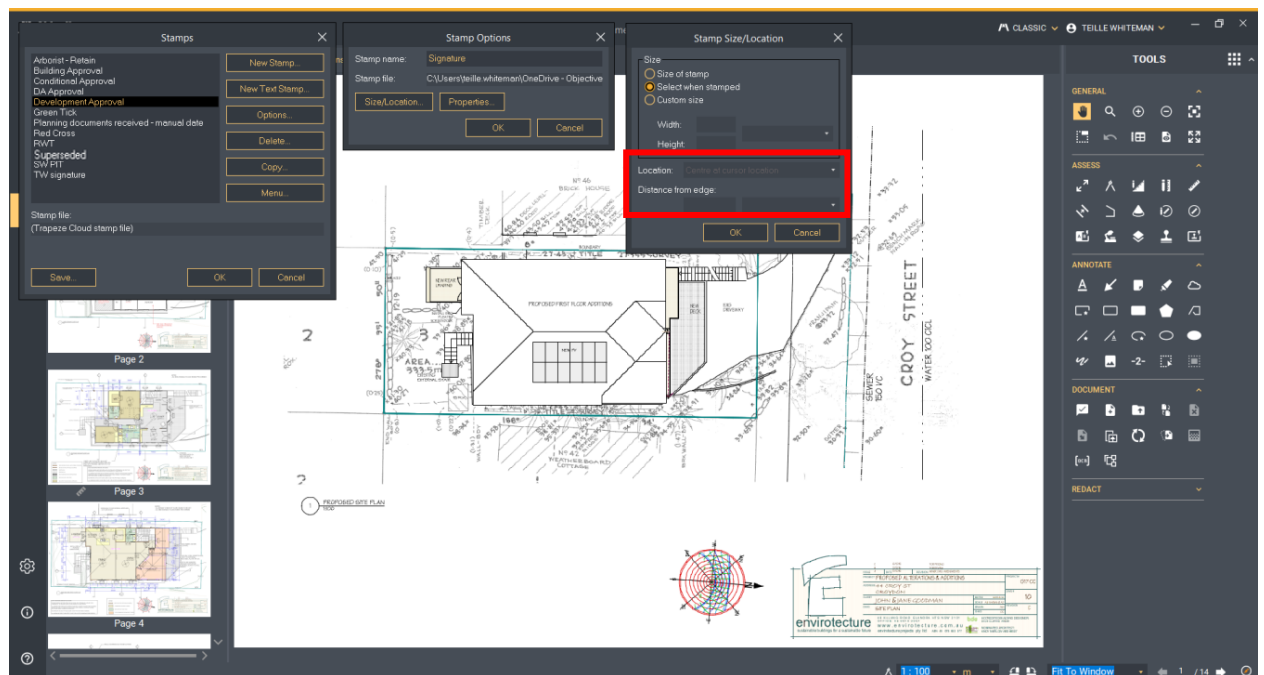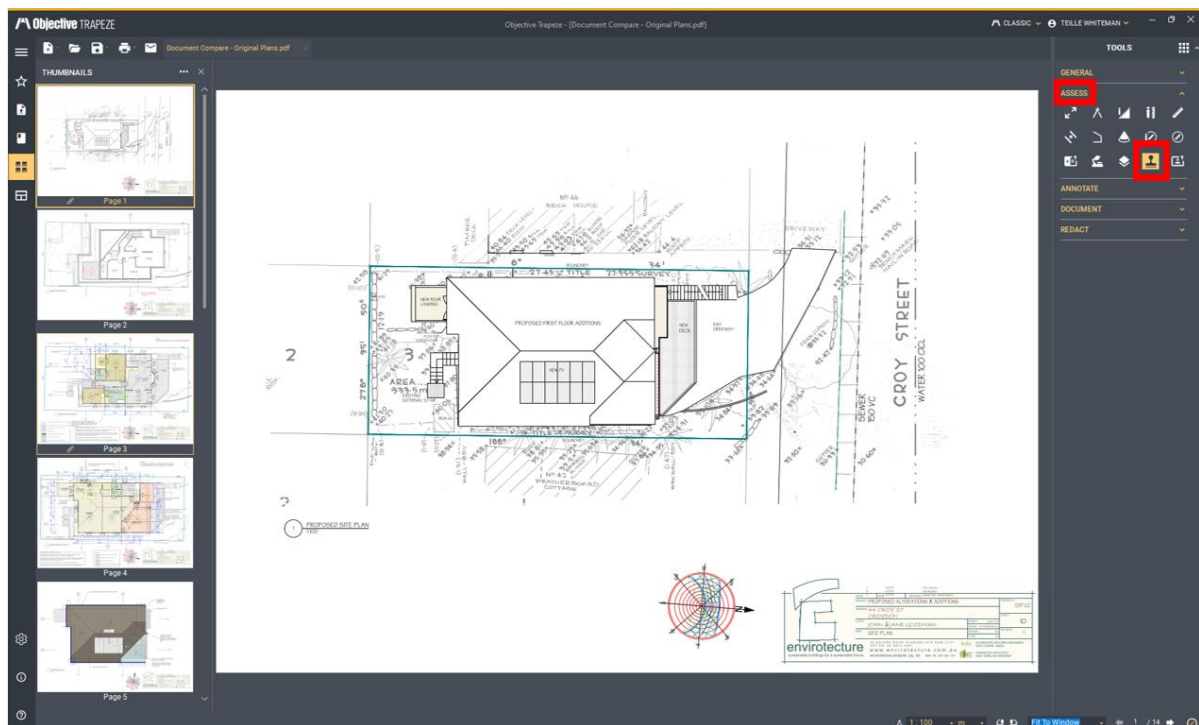
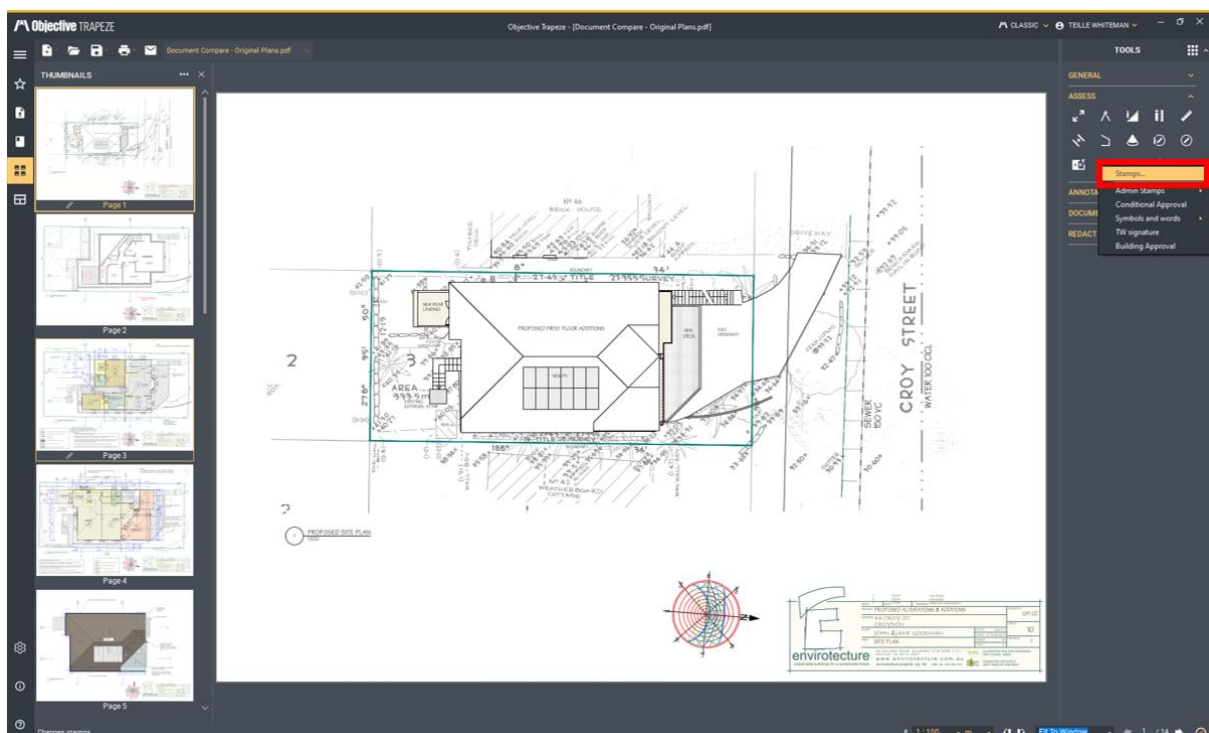13. Click **OK** on all open windows and then test stamp on page.
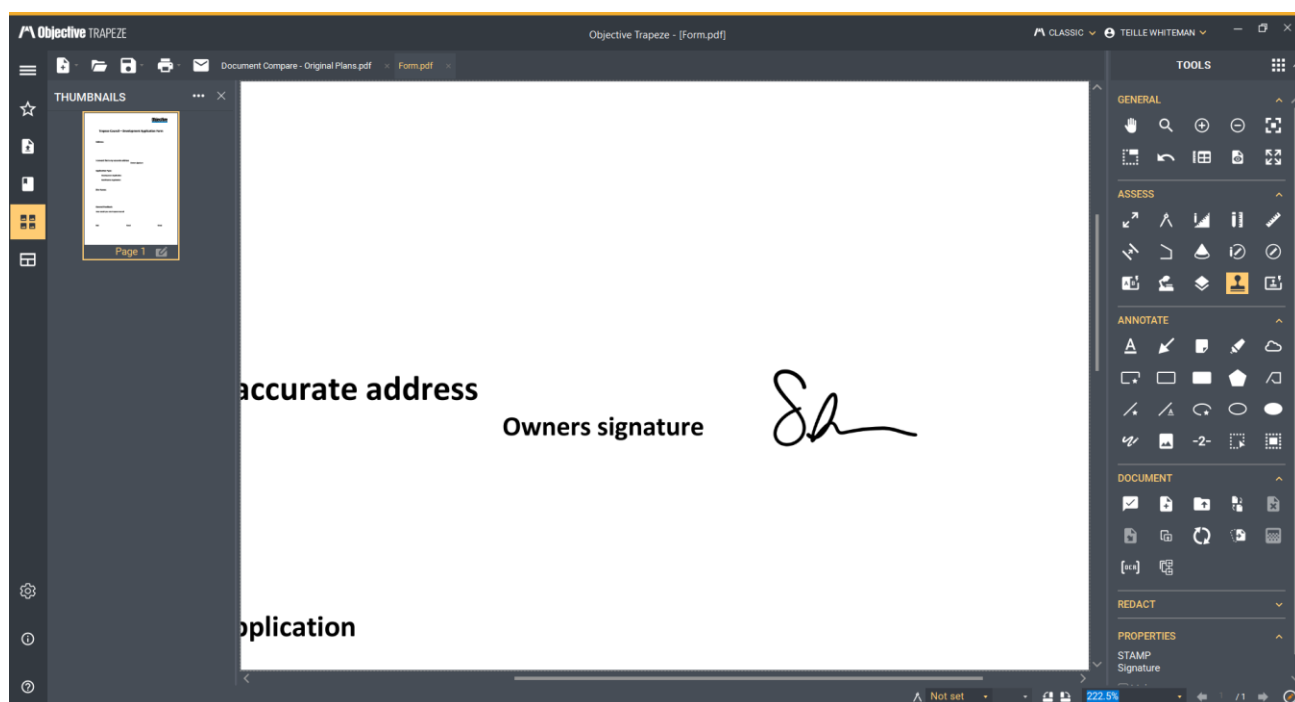
14. Follow the above steps to create stamps for symbols or icons commonly used to mark up plans (i.e., a green tick to mark properties that have been sent a neighbour notification letter).

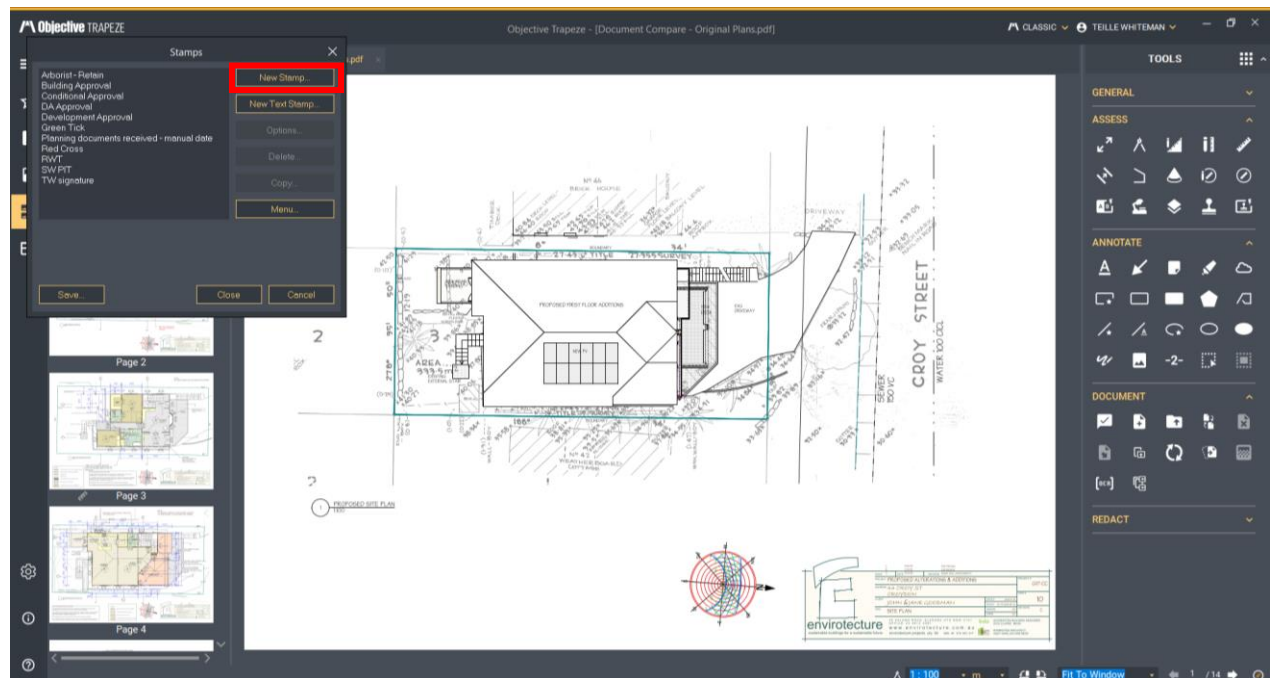## 1.2   Creating a stamp of a commonly used word

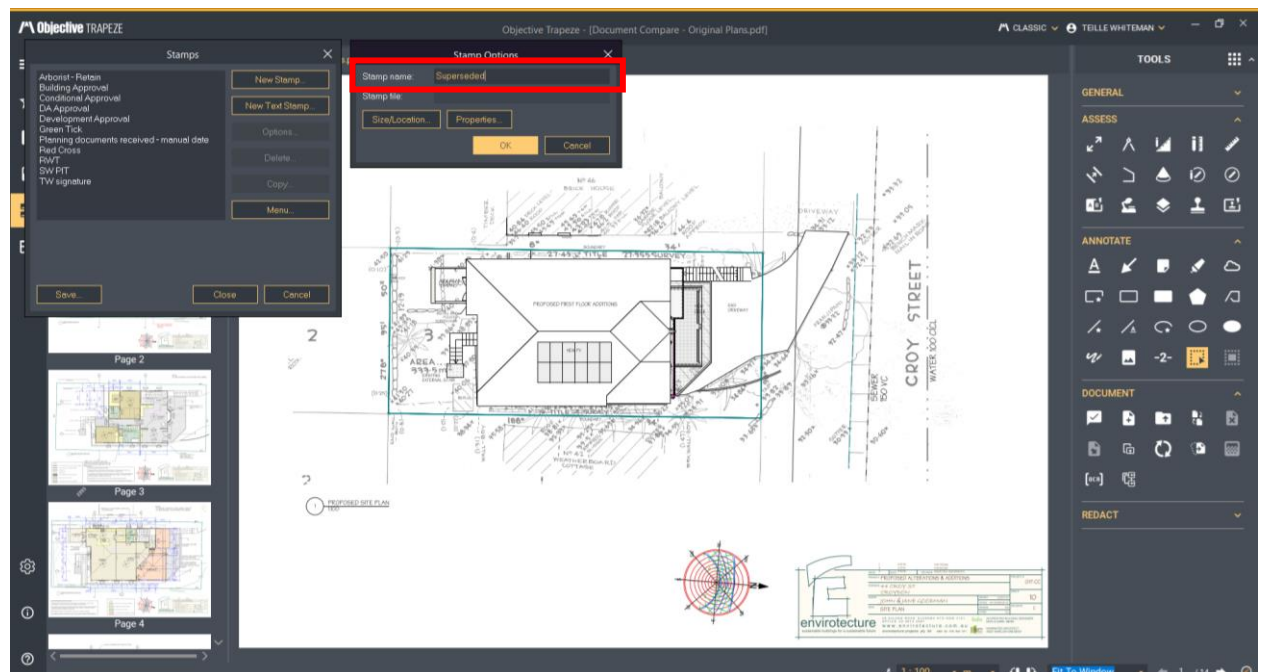1.   Click the **Stamp Annotation Tool** from the **Assess Toolset**.
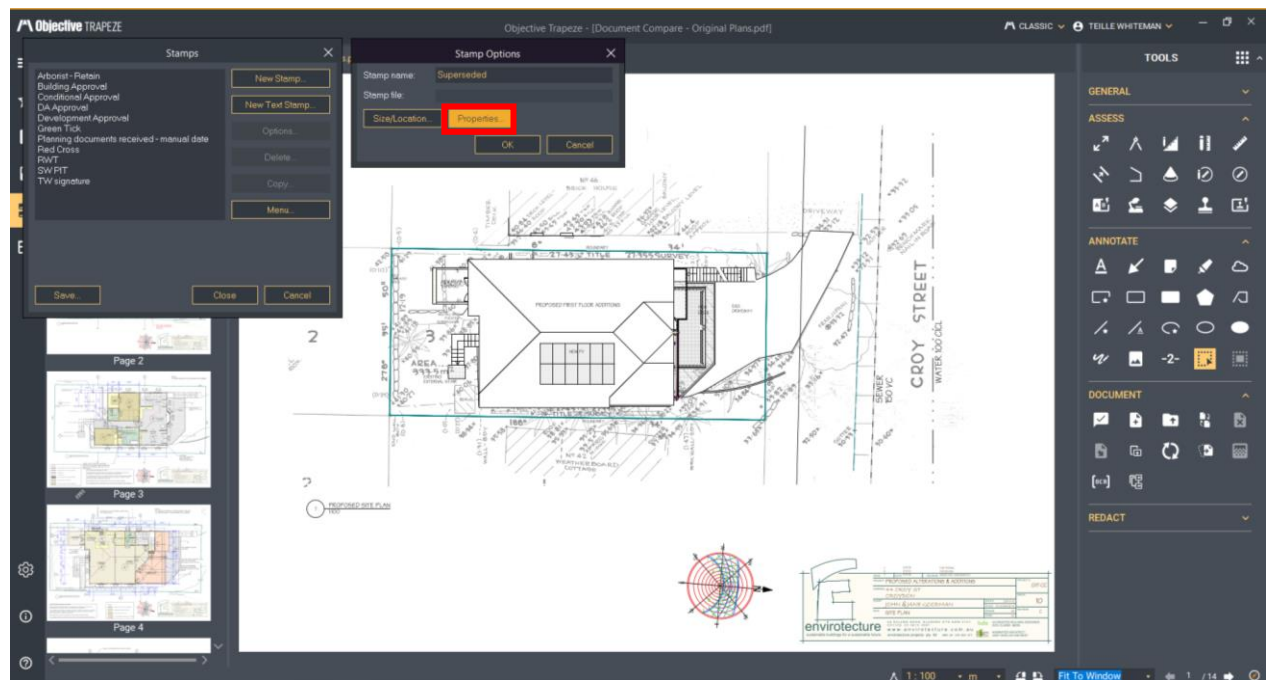

2.   Select **Stamps** to open the **Stamps** window.

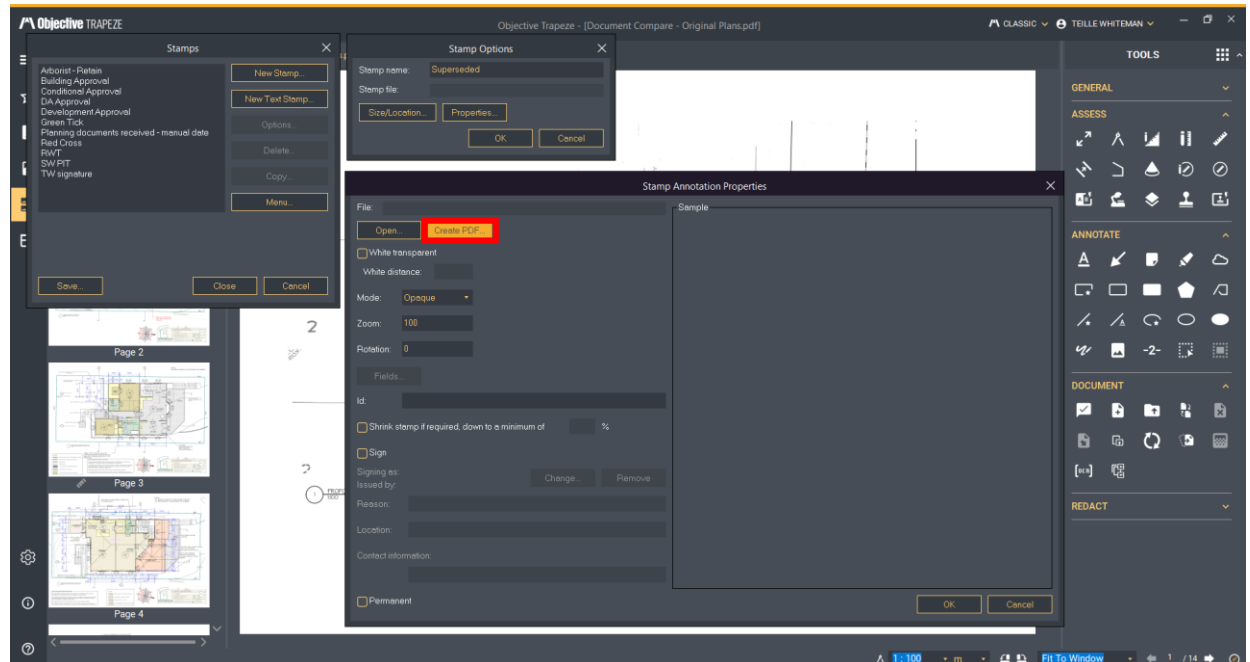3. Click **New Stamp** to open the **Stamp Options** window.

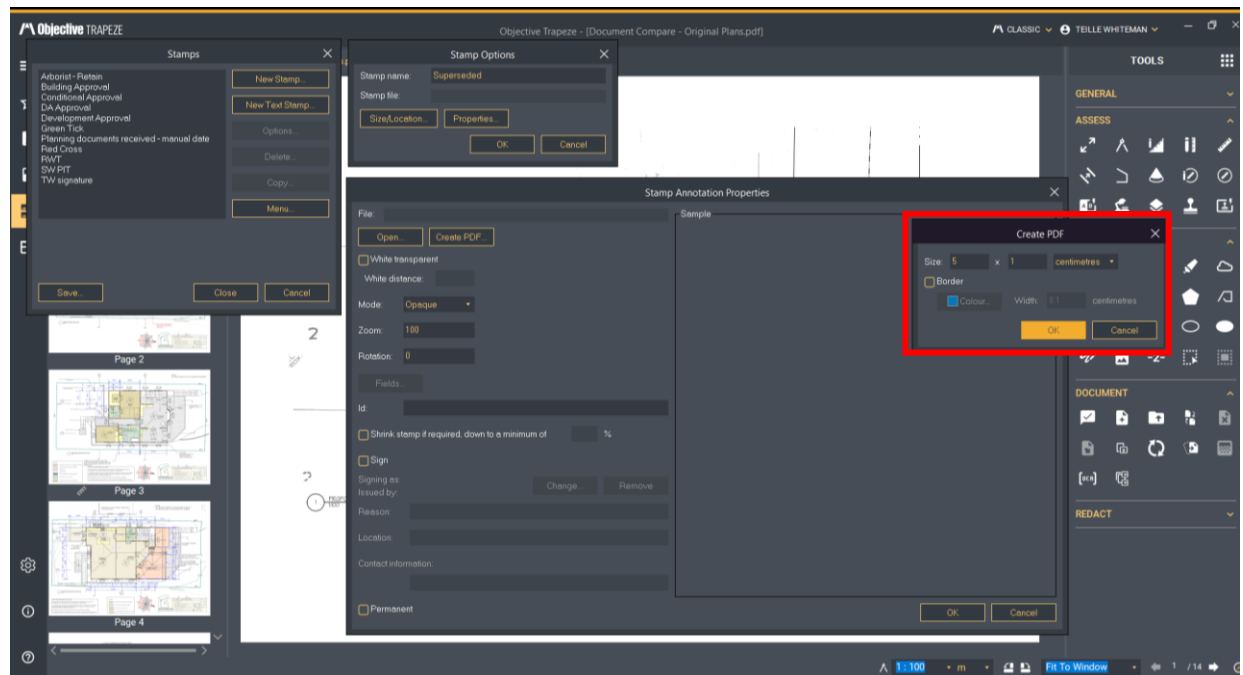4. Type a name for the new stamp in the **Stamp name** field.

5. Click **Properties** to open the **Stamp Annotation Properties** window.
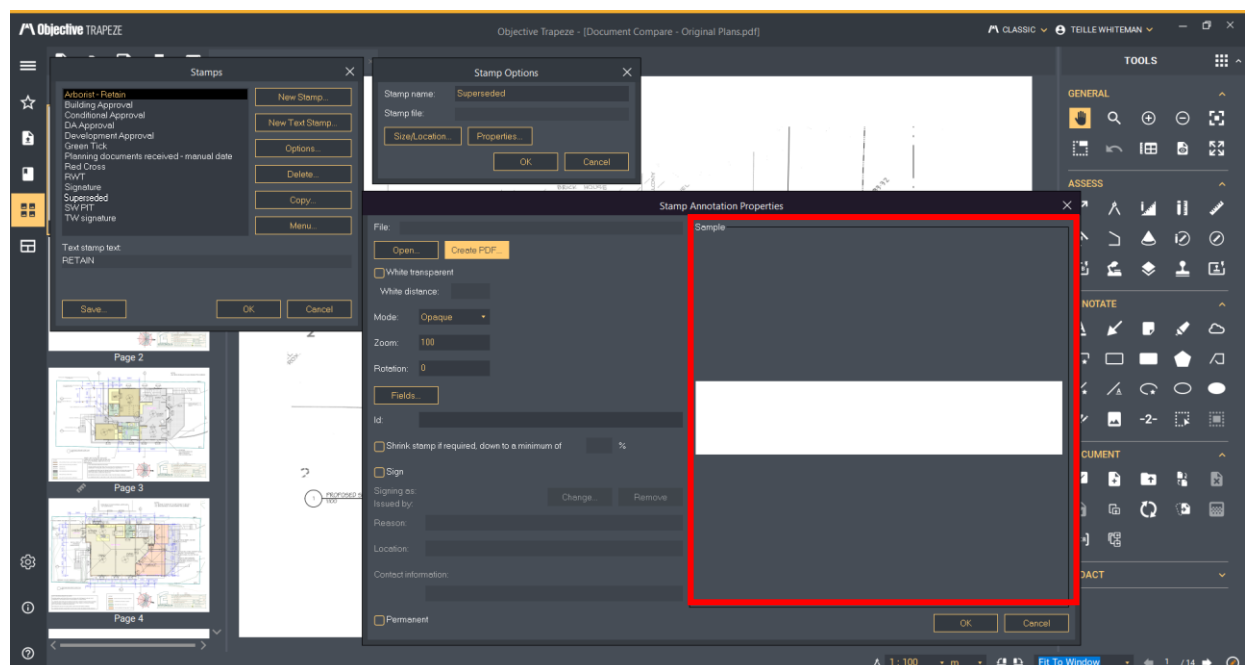

6. Click **Create PDF** to open the **Create PDF** window.
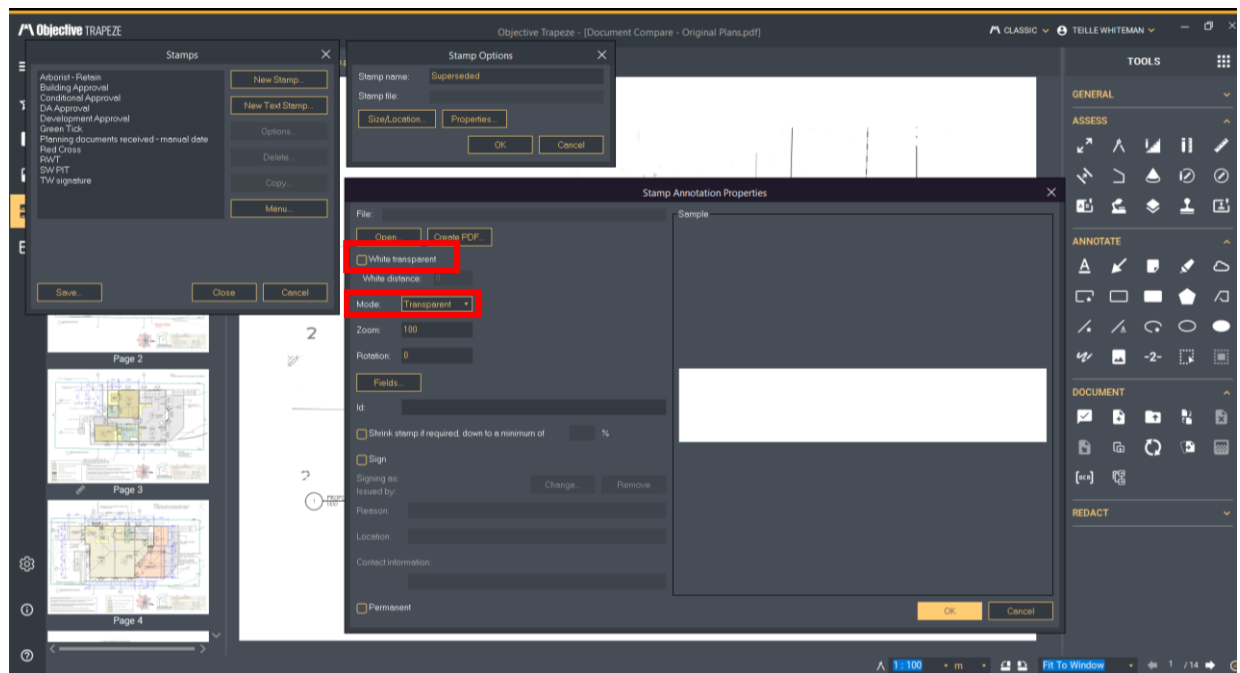
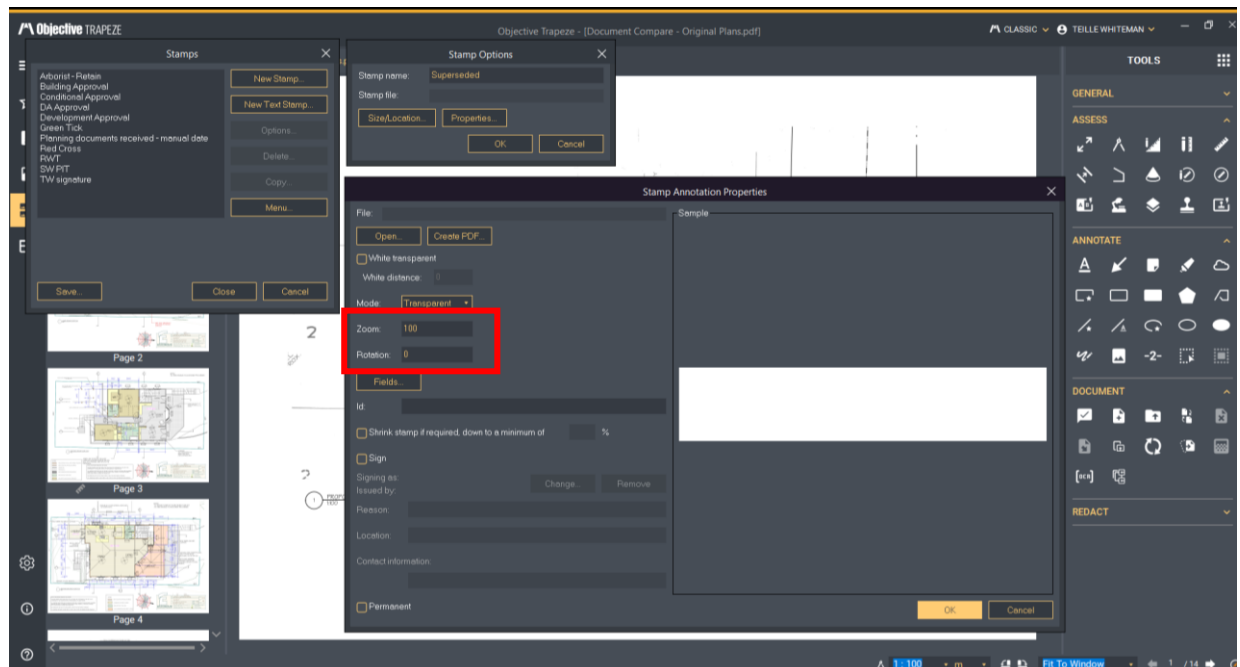7. Set the stamp proportions and any border requirements.

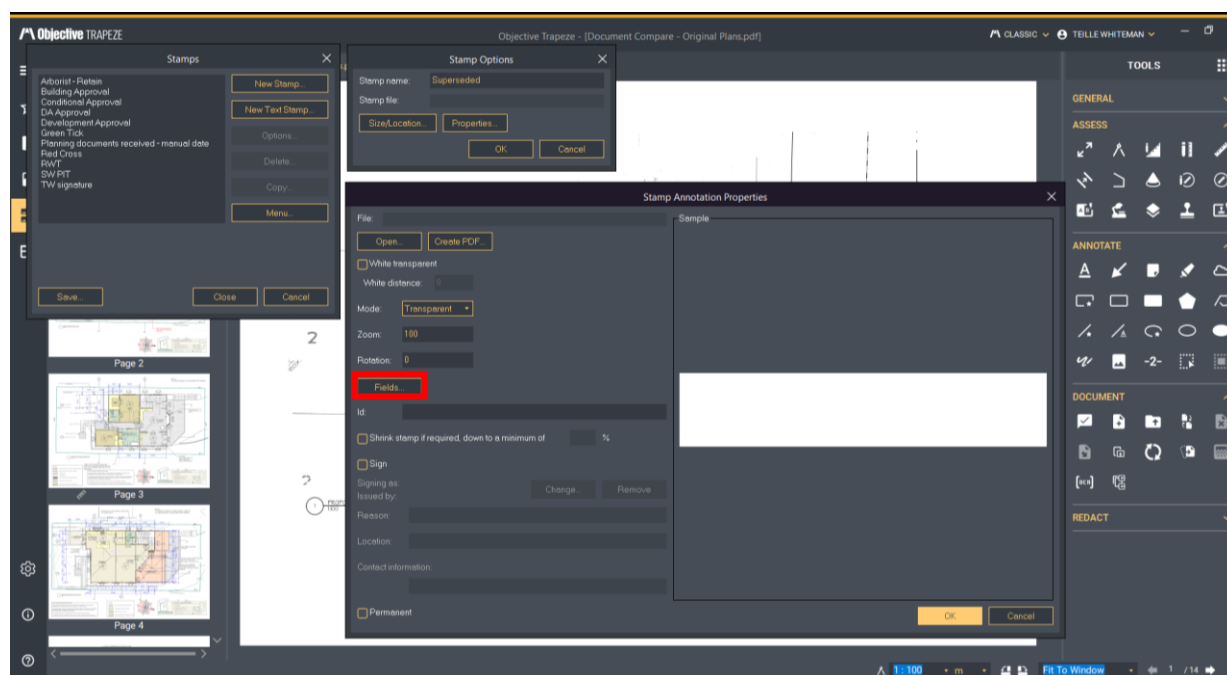8. Click **OK** to close the **Create PDF** window and display the stamp appearance in the Sample area.

9. Select **White Transparent** to make only the background to be transparent. Otherwise, make the entire stamp transparent using the **Mode** options.
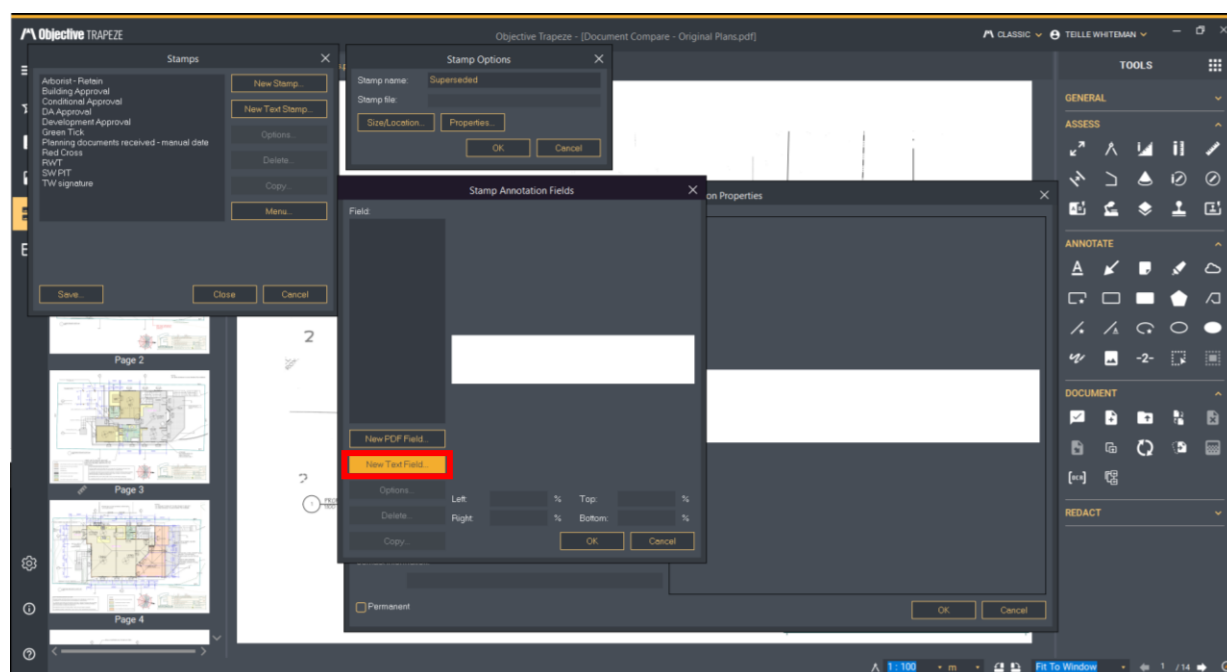

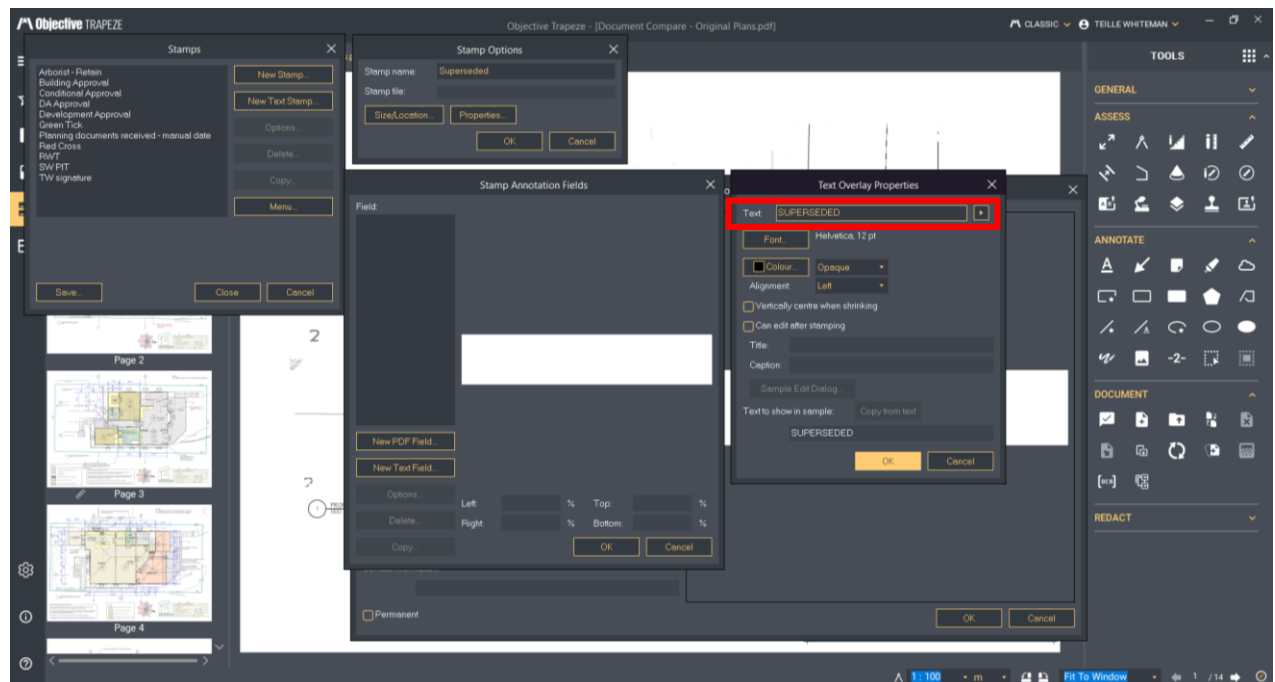10. Change the stamps default **Zoom** and **Rotation** if required.

11. Click **Fields** to open the **Stamp Annotation Fields** window.

12. Click **New Text Field** to open the **Text Overlay Properties** window.

13. Type the required text into the **Text** field (this can be static and/or dynamic text).


14. Change the properties of the text as required.

Note: The **Mode** option controls the transparency of this Text Field. This is necessary when layering multiple text/images on top of each other. In this example, it does not need to be changed as there is only one Text Field. Please contact Trapeze Support for assistance relating to the layering of stamp fields.
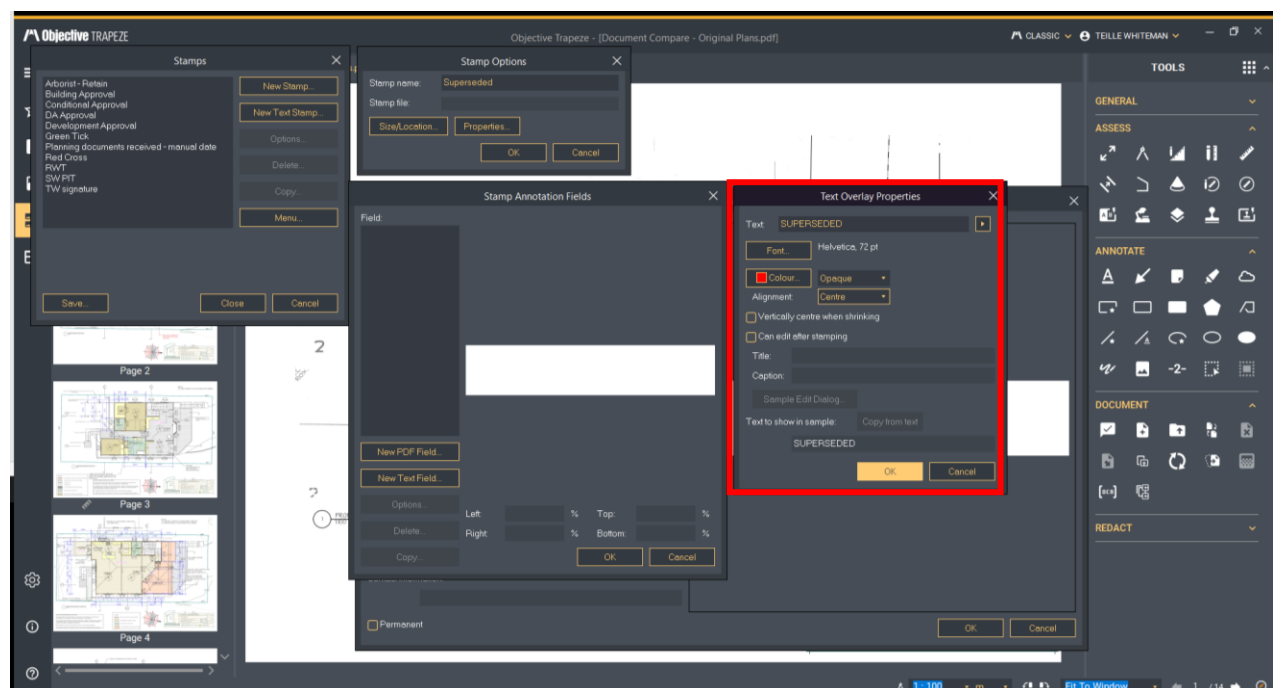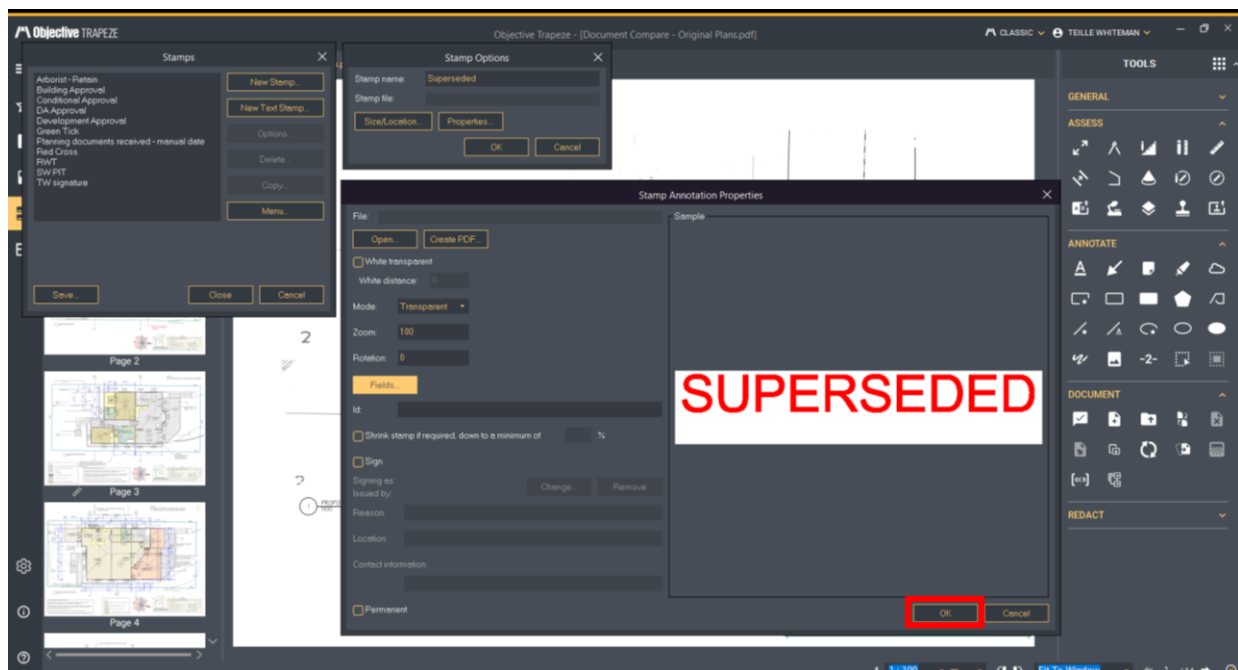
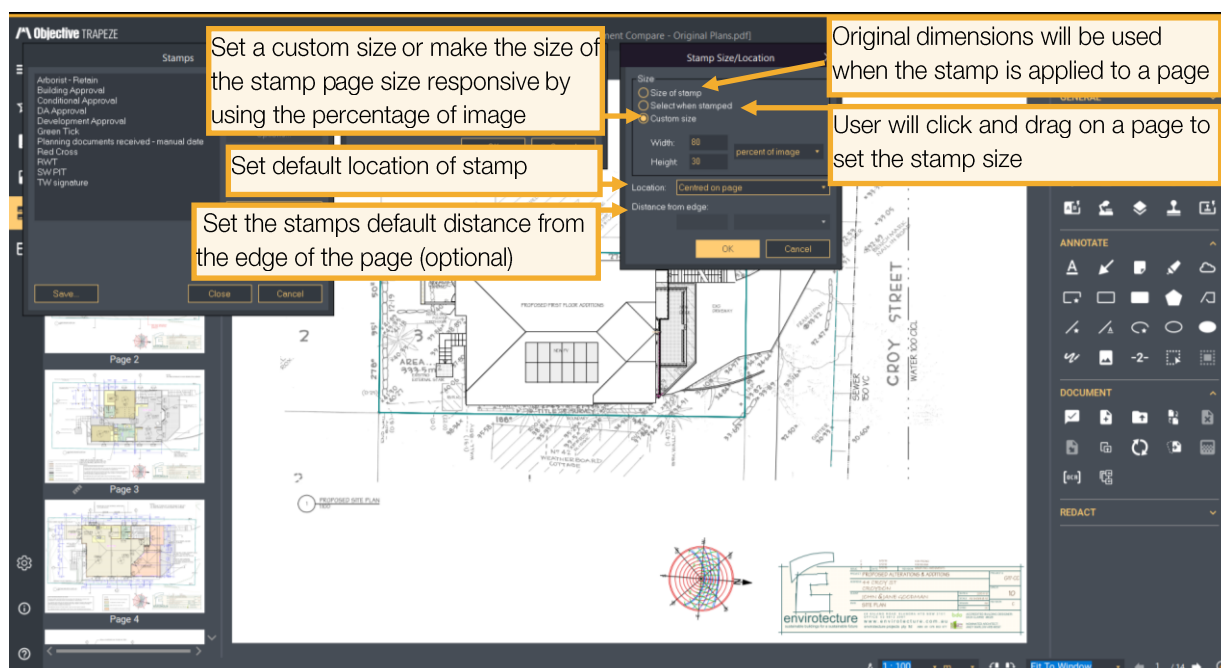15. Click **OK** to return to the **Stamp Annotation Fields** window.

   Note: The text will display in the Sample area of the **Stamp Annotation Properties** window.
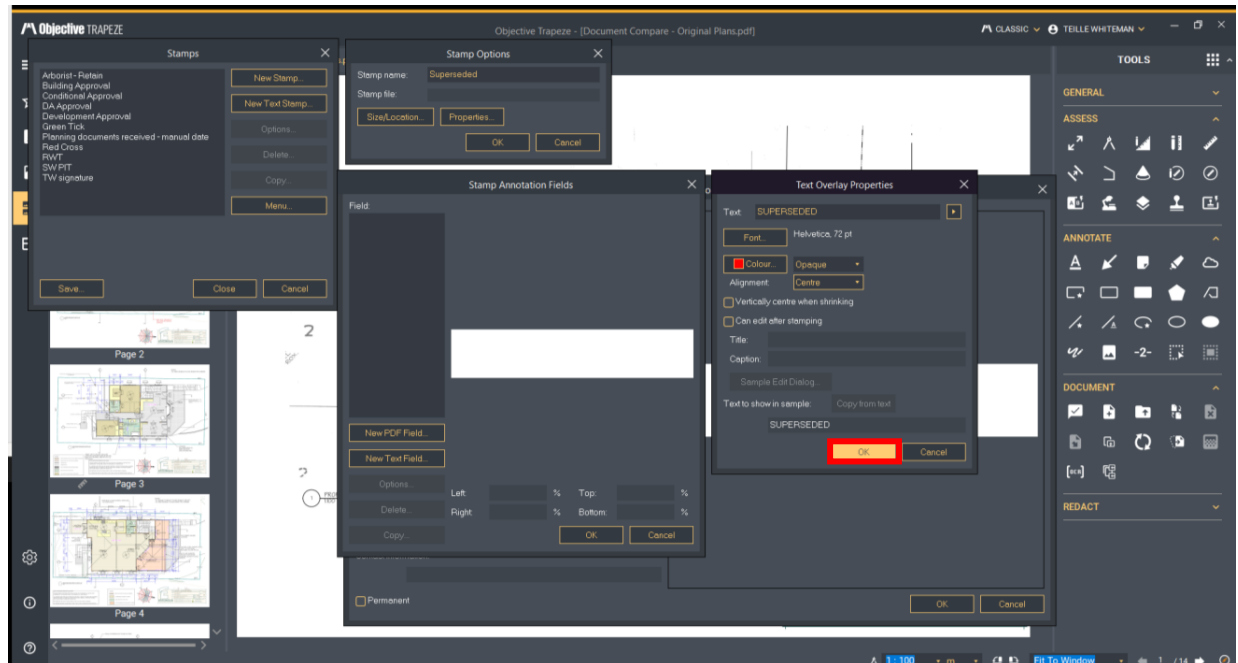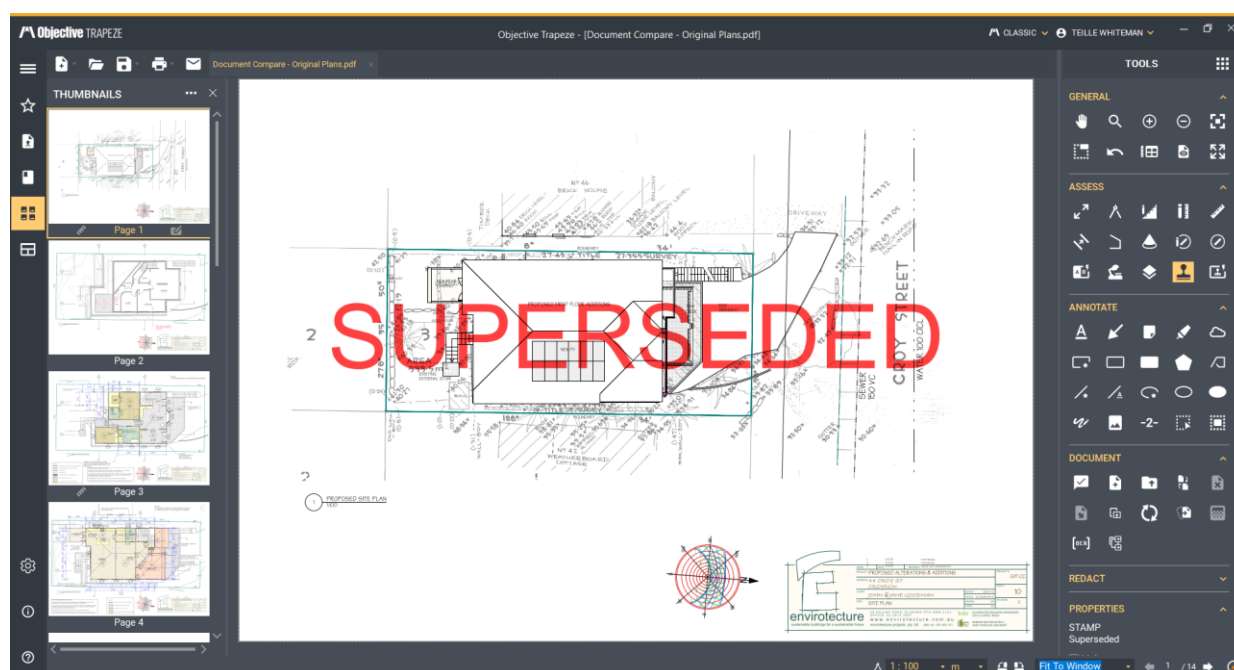

16. Click **OK** to return to the **Stamp Options** window.

17. Click **Size/Location** and change preferences as required.

Set a custom size or make the size of the stamp page size responsive by using the percentage of image

Set default location of stamp

Set the stamps default distance from the edge of the page (optional)

Original dimensions will be used when the stamp is applied to a page

User will click and drag on a page to set the stamp size

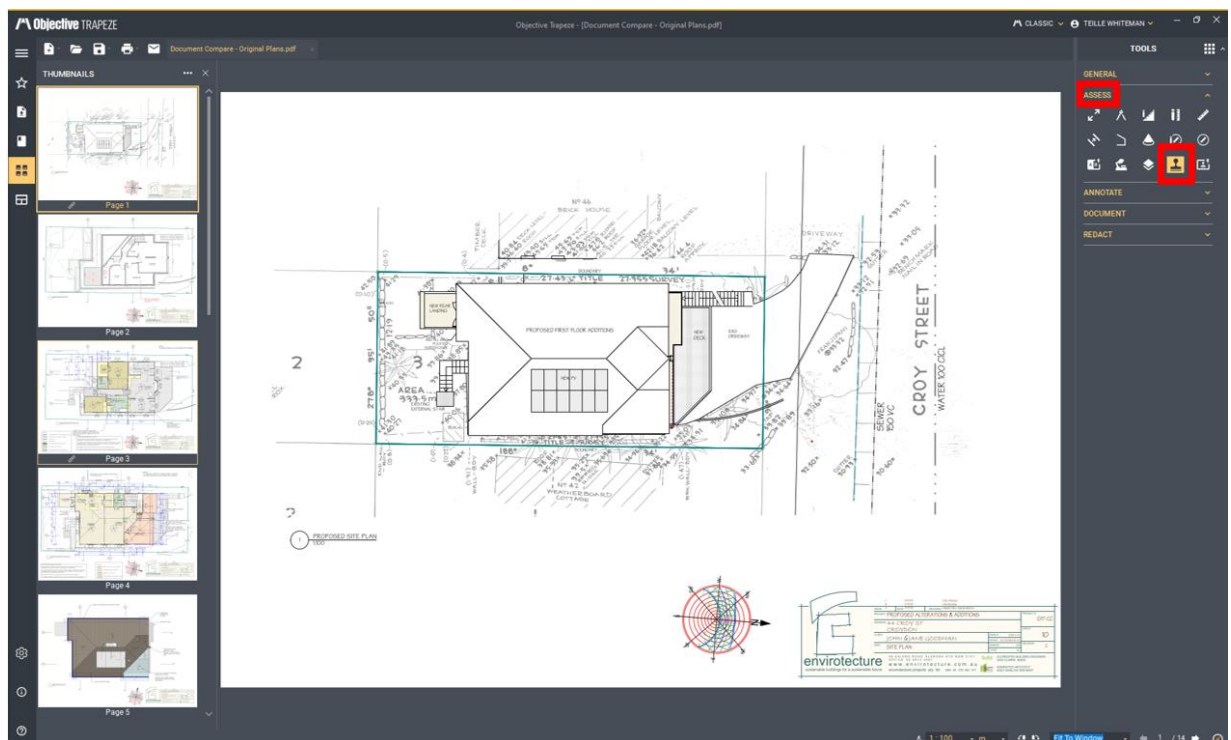18. Click **OK** on all open windows and then test stamp on page.
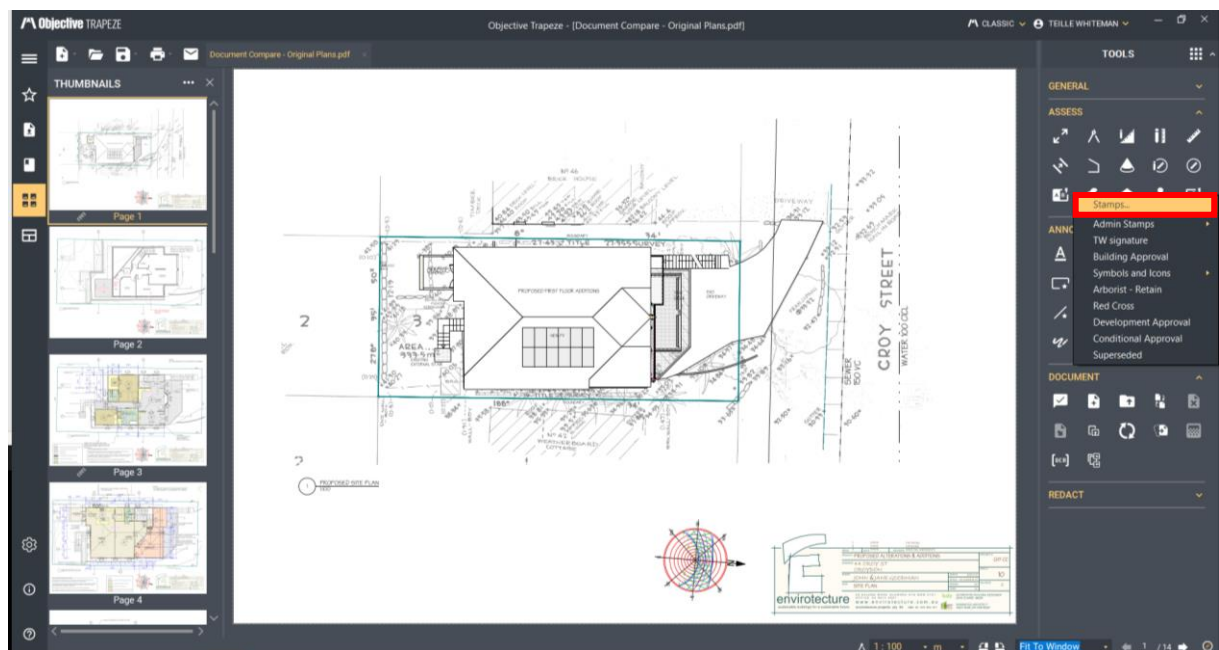
Organise and share stamps

1.1 Organise stamps into submenus

Stamps can be organised into logical submenus, which is particularly helpful if your organisation has lots of stamps.
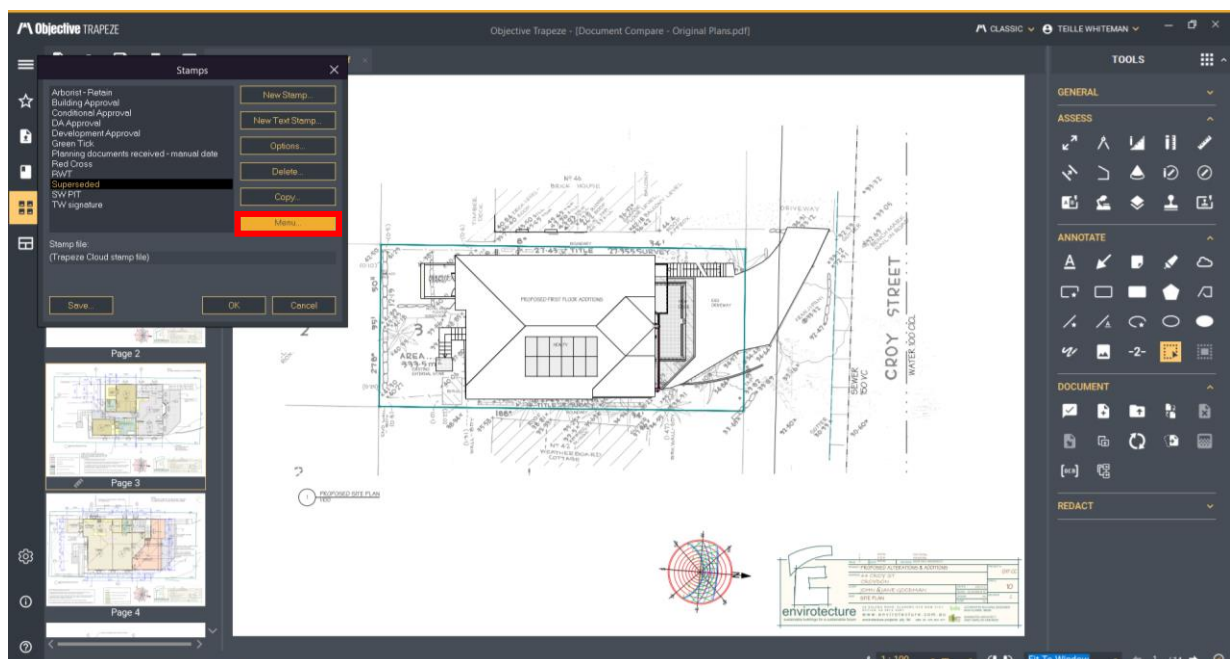
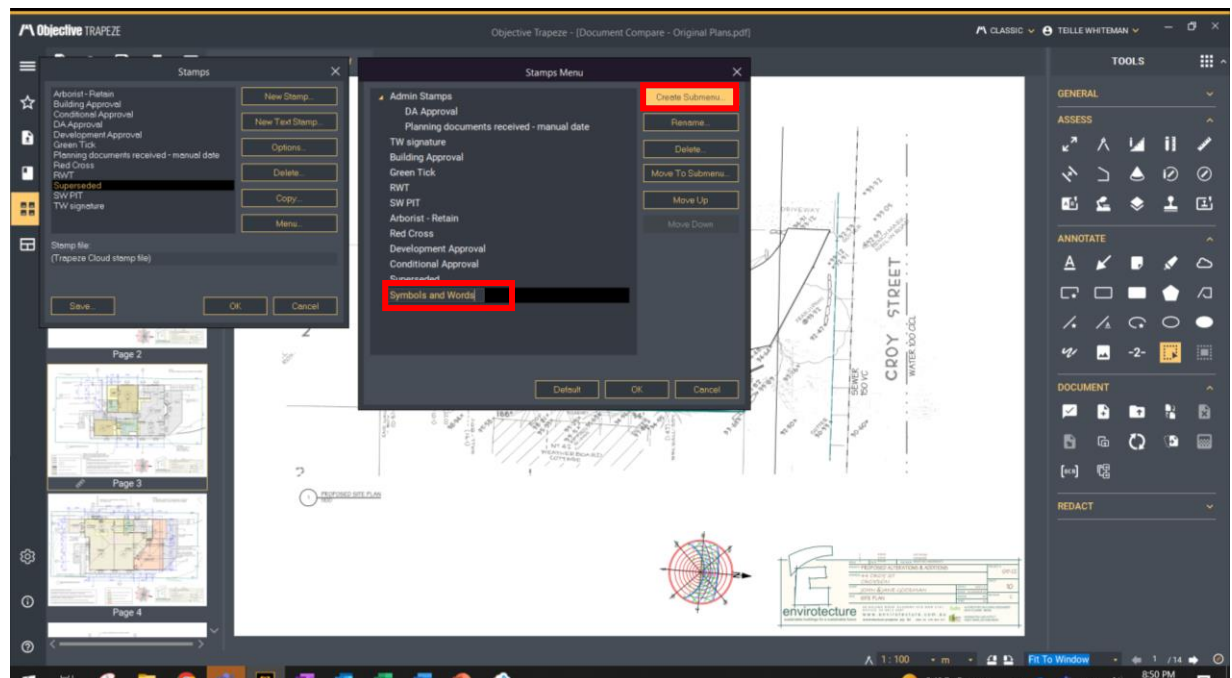1. Click the **Stamp Annotation Tool** from the **Assess Toolset**.

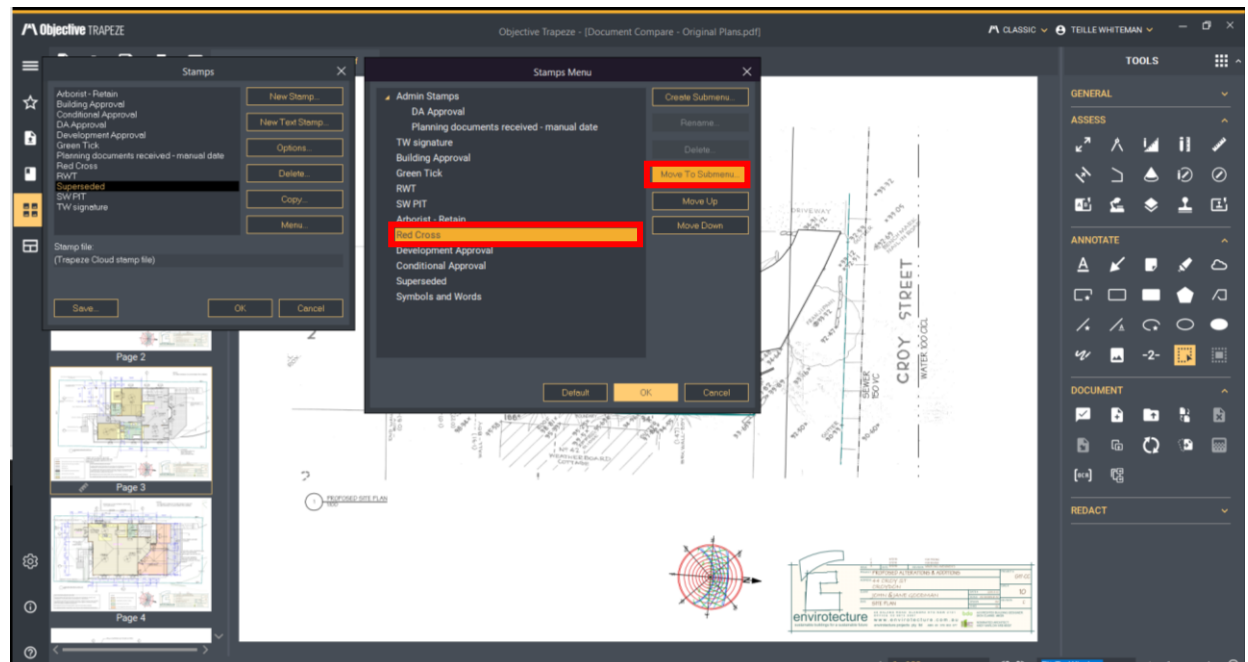2. Select **Stamps** to open the **Stamps** window.

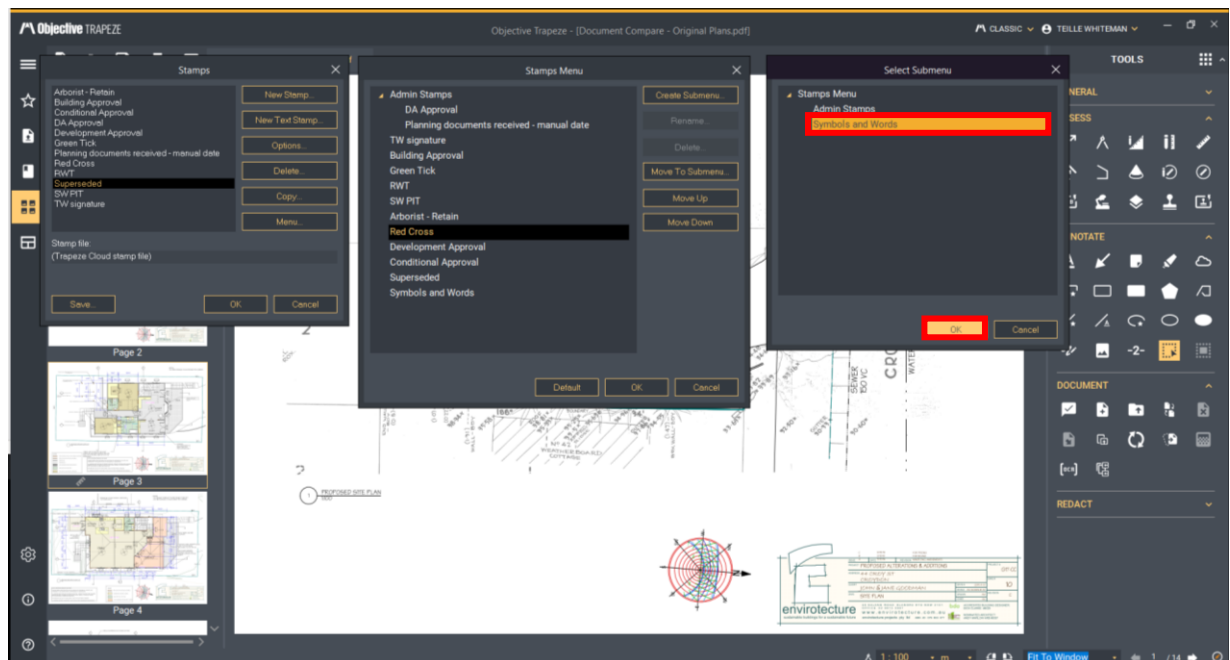3. Click **Menu** to open the **Stamp Menu** window.
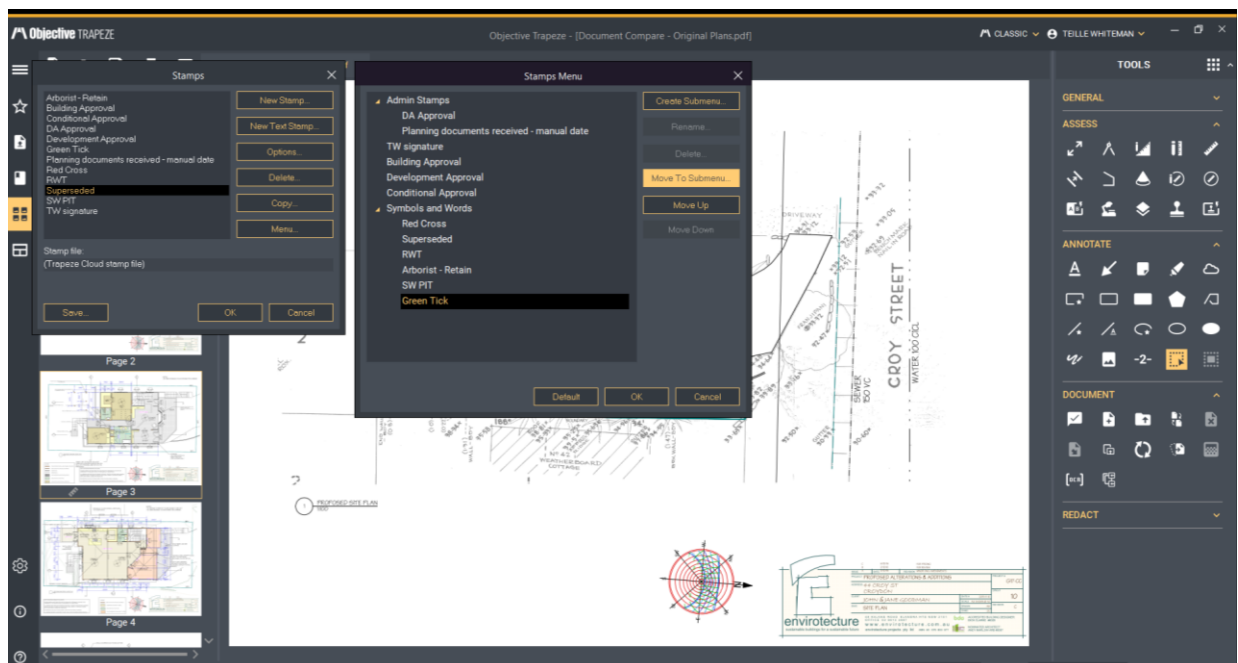
4. Click **Create Submenu** and name the submenu.

5. Click a stamp and then click **Move to Submenu.**
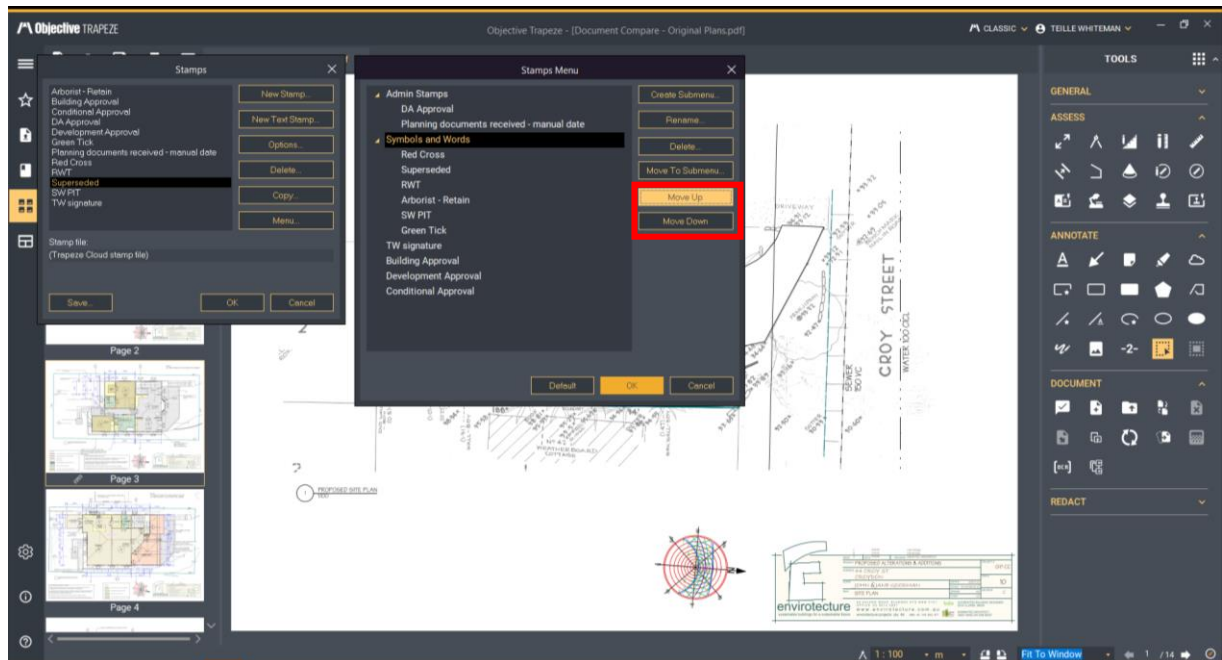
6. Select the desired submenu and then click **OK** to return to **Stamp Menu** Screen.
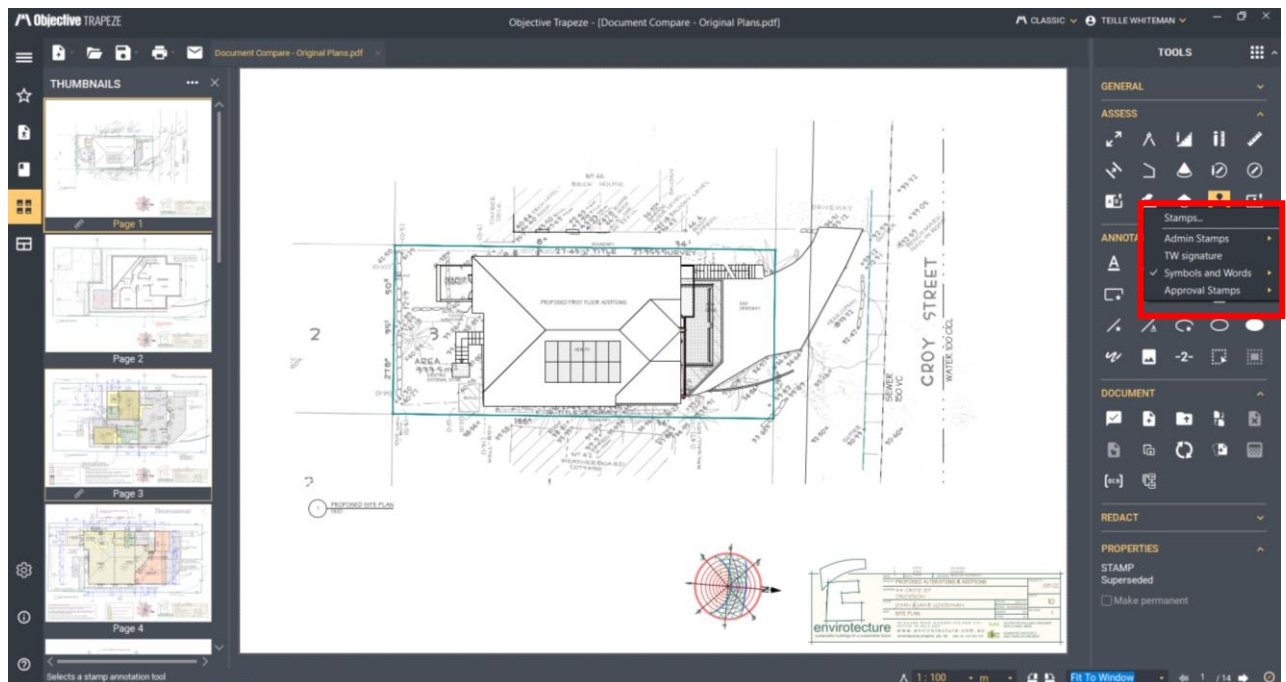

7. Follow steps 5 and 6 to add any other stamps to the submenu.

8. Click the **Move Up** and **Move Down** buttons to rearrange the order of the submenus or stamps.
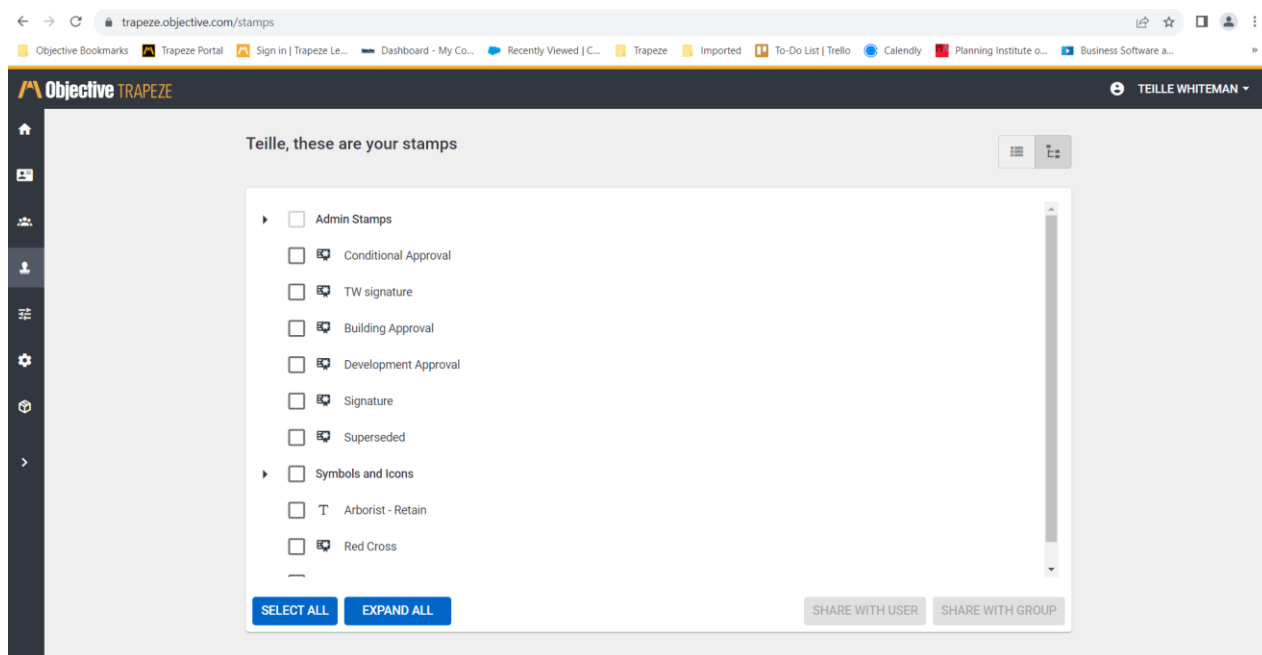

9. Click **OK** to return to the **Stamps** window and click **OK** to return to screen.

10. Click **Stamps** in the **Assess Toolset** to see resulting stamp menu and list structure.

1.2   Share stamps with other users

1. Use Trapeze Cloud Administration to easily share stamps with other users or groups as detailed in the Trapeze Cloud Admin Guide.

Note: The Trapeze Cloud Administration system in included in the Trapeze subscription and can be set up by following the Trapeze Cloud Admin Migration Guide. Please contact trapeze.support@objective.com for assistance.

For customers not using the Cloud Administration system, stamps can be shared via the .ini configuration file using the Trapeze Administration Tool which is accessed by clicking Menu > Help > Administration. Please contact trapeze.support@objective.com for assistance.

Need assistance?

If you have any questions, encounter difficulties, or simply need assistance, please do not hesitate to reach out to our dedicated support team at trapeze.support@objective.com