How to Designate a Document as Restricted

TI version 10.7

TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● eTMF
- ● eISF

Designating documents as Restricted Content is the first step to applying redaction within the TI platform. This action protects documents from being accessed by any users not having the adequate permissions, until Redaction is completed.
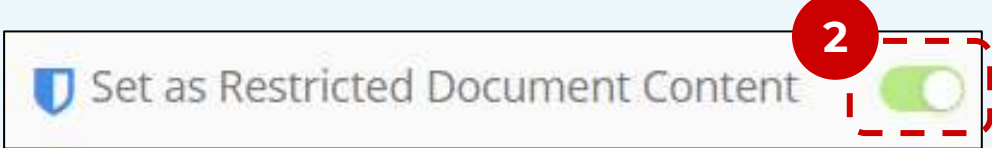
A document may be designated as 'Restricted' either during or after upload.

Designating a Document as Restricted during Upload

1 Start importing a document.

📄 Document ▾	🔒 Manage Security	🗒 Mass Coding	⬆ Import ▾	⬇
⊕ Add Document **1**			📄 Metadata **1**	
✖ Delete			⬆ Documents	

2 Locate the **Set as Restricted Document Content** toggle, and activate it (indicator turns green).

🛡 Set as Restricted Document Content 🟢 **2**

3 Complete your upload as usual. A shield mark indicates restricted document(s).

☐ 🇼 ⭐ 🛡 **3**

Designating a Document as Restricted after Upload

4 **Right-click** on the chosen document to open the document actions menu.

5 Click on **Set as Restricted Document Content**.

- ⊕ Add Document
- ⧉ Copy Link
- ✖ Delete
- ✖ Reject
- 🔒 View document security
- 🛡 Set as Restricted Document Content **5**
- 🔗 Replace Attachment / URL

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