

How to Redact Documents

TI version 10.7

APPLICABLE TO:

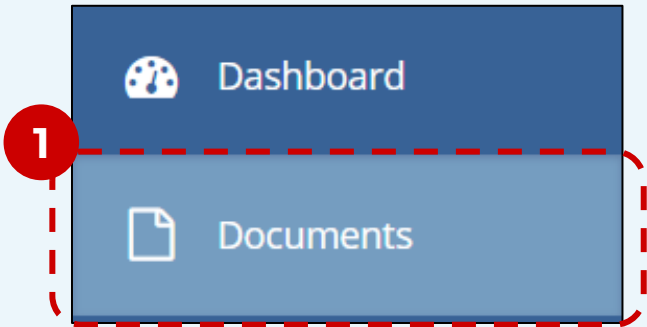
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ eTMF
- ☒ eISF



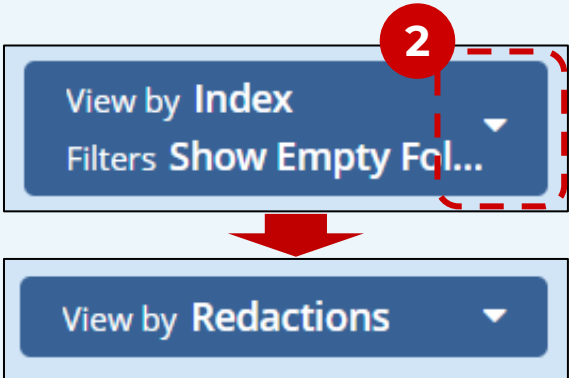
Users may only perform redaction if they have been assigned the respective action by an Administrator (via **User Management** module).

In order for a document to be redacted, it must first be marked as **Containing Restricted Content** (see related job aid).

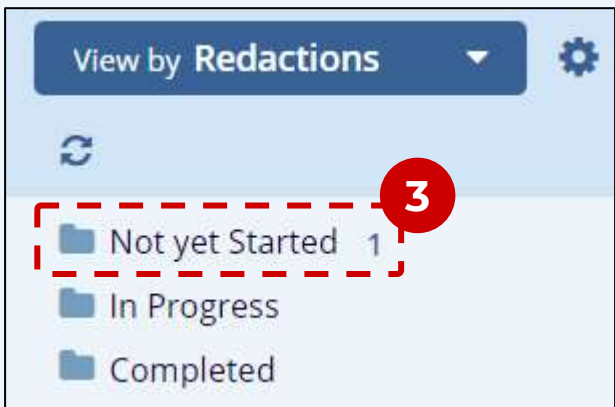
1 Log in to a room, and navigate to the Documents module.



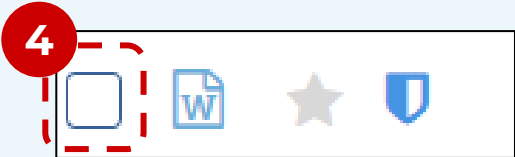
2 Using the View selector, switch to the **Redactions** view.



3 Documents awaiting redaction are stored in **Not yet started**.



4 Select a document.

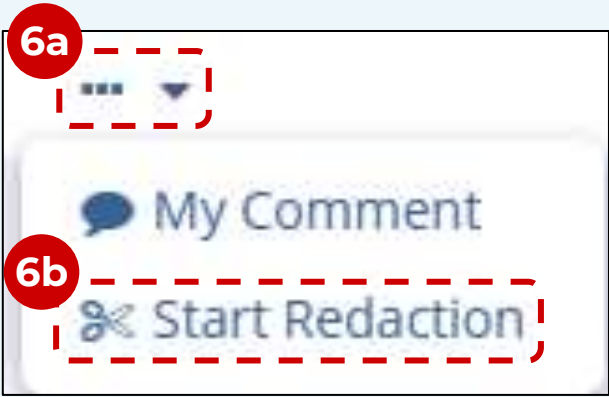


Note: Documents under redaction are marked in grid views with a shield – the color indicates at what stage of Redaction the document is.

5 Switch to **Document View**.



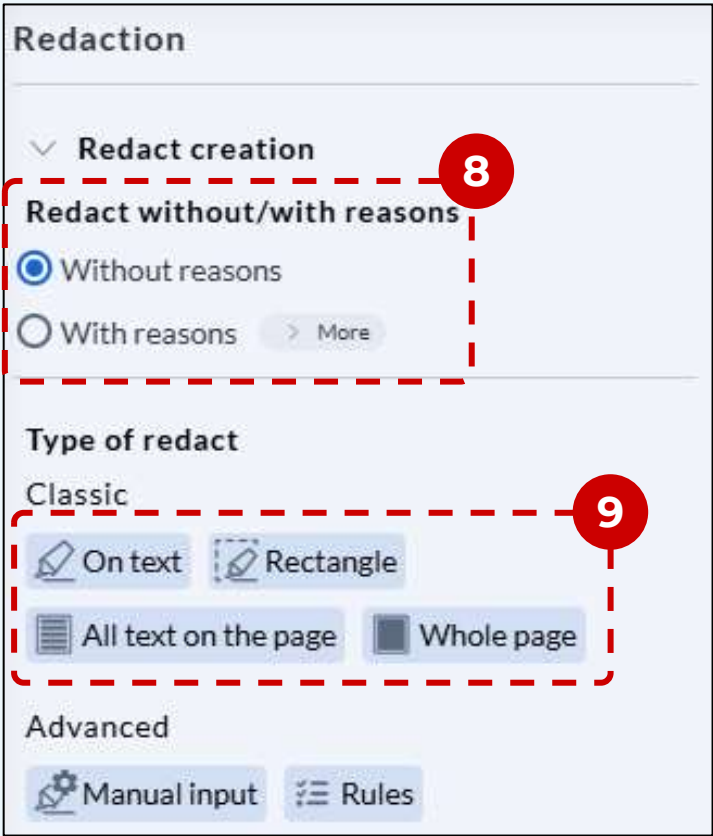
6 Expand the More Actions list (ellipsis button), then click **Start Redaction**.



7 Click on the **Redact browser** button on the left-side menu.



8 Choose your preferred style of redacting.

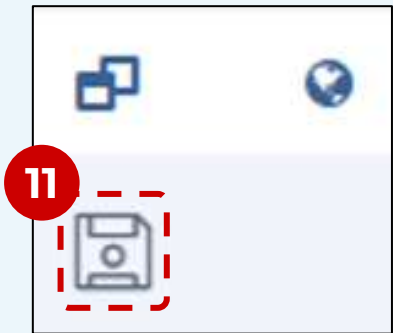


9 Select **how** you will apply the redaction.

10 If you selected On Text or Rectangle, **apply** the redaction directly on the page.

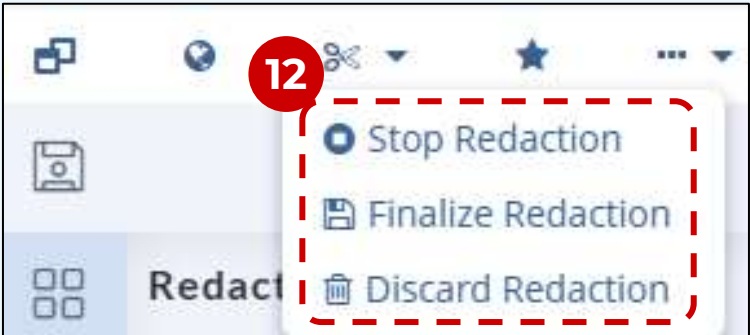


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- Apply redaction as many times as necessary. When you are satisfied, click the **Save** button (floppy disk icon) in the ribbon.



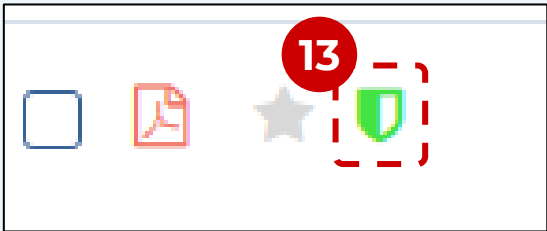
Principal Investigator: _____		
Protocol #: _____ TYP-0034 _____		
Staff Member	Title/Role (e.g., PI, Sub-I, Study Coordinator, etc.)	Signature
_____	Principal Investigator	_____
_____	Med Assistant	

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- Expand the **Complete Redaction** (scissors icon) menu in the ribbon and choose one of these options:
- Stop Redaction** – save changes for later.
- Finalize** – Save and lift visibility restrictions.
- Discard** – undo all changes.



A redaction process is complete only when Finalize is used.

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- Documents in a completed redaction state are marked with a green shield. Any users can see the redacted version of the document, but not the original.



Note: Admins and users with Redaction privileges will always be able to see the unredacted original.