APPLICABLE TO:

- ● Administrators
- ● Room Managers
- ● Editors
- ○ Readers

- ● eTMF
- ● Study Start-Up
- ○ myTI
- ● Content Management

- • Administrators must enable the **Redaction** Action within the **User Profile** in order for a user to perform these steps.
- • In order for documents to be redacted, they must first be marked as **Containing Restricted Document Content.** This protects the document so non-redacting users cannot see its contents
- • See related job aid: **How to Mark a Document as Containing Restricted Content**
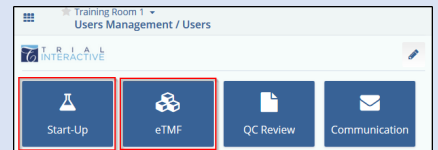
Redaction can be useful for:
- ✓ Removing subject identifiers
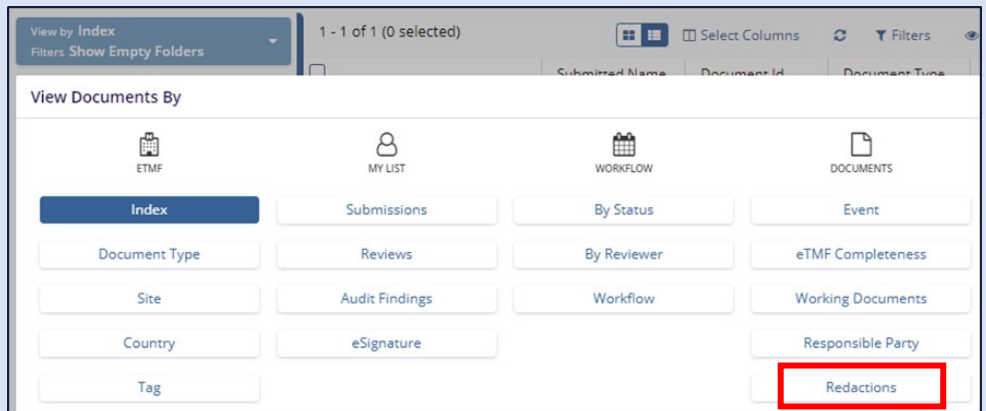- ✓ Protected Health Information (PHI)

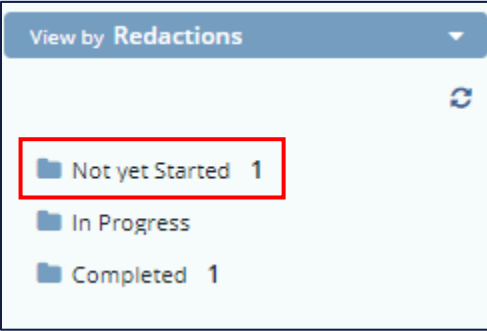These features are available with the **TI Viewer** selected.

1. Log in to a room and go to the relevant application using the Navigation grid

2. From within the **Documents** Module, select the **Redactions** folder from the View by Pane

TRIAL INTERACTIVE

View by Redactions

📁 Not yet Started **1**
📁 In Progress
📁 Completed **1**

3. To view documents awaiting redaction, click the **Not Yet Started** folder.
Select a document from the grid

Note: Documents that are waiting for redaction are indicated by the blue shield icon

		Submitted Name	Document Id
☐ 📄 ⭐ 🛡 📖 ⋯		Confidentiality A...	208528

4. Open the selected document by clicking **Document View** below the grid.

Grid View	Document View

5. Above the document, under *More* Actions, click **Start redaction.**

Print CTRL + p

💬 My Comment
✂ Start Redaction
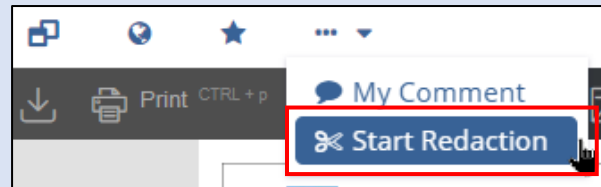
6. *Method 1*: For OCR-enabled documents only;

First choose the location within the document where you will mask text, then click and drag the cursor over the text to select text for redaction.

💡 Documents available for redaction include any Microsoft® Office files and any PDF.

PERSONAL DATA

Date of Birth	July 1, 1950
Place of Birth	Anchorage, AK
Citizenship	United States of America
Home Address	4456 Main Street Sunny, CA 00199
Telephone	555/123-0807

PERSONAL DATA

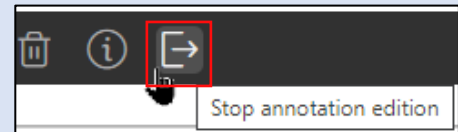|	
Date of Birth	July 1, 1950
Place of Birth	Anchorage, AK
Citizenship	United States of America

TRANSPERFECT
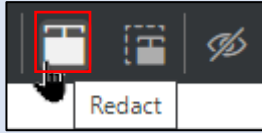
7. (method 1, cont.)
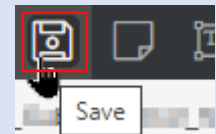Click on the Redact button.
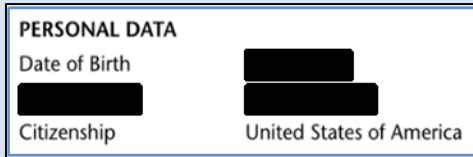
The selected text will be masked

8. When done redacting, use the **Stop annotation edition** button above the document
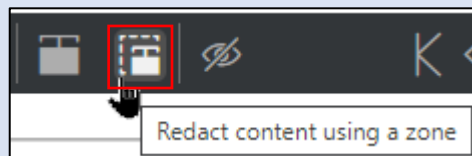
8a. Repeat steps 6 - 8 until all required redaction is complete.

Press **Save** to keep any changes made during this redaction session. See step 11 for finalizing the redaction process.
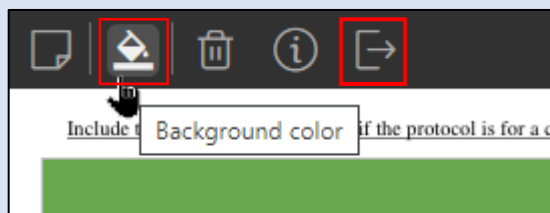
9. *Method 2*: For any eligible document;

After clicking the Start Redaction button (see Step 5), select **Redact content using a zone.**

9. *(cont.)* Drag the square selection tool over the area you wish to mask
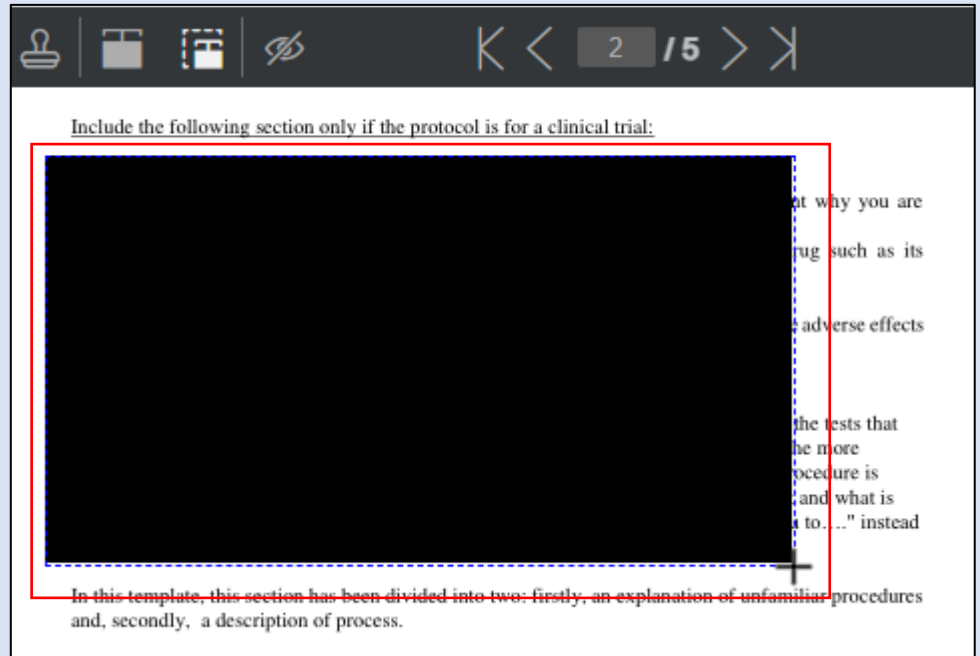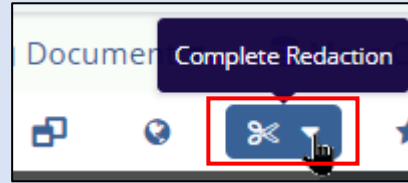

10. You can customize the mask color using the **Background color** button before stopping the annotation.
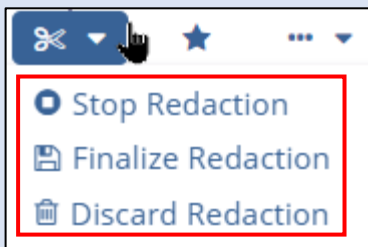

Save your changes when done.

11. After performing redaction, finalize the editing through the **Complete Redaction** button.

Choose the appropriate mode:

-**Stop Redaction** maintains changes in a 'draft' status – the document is still restricted
-**Finalize Redaction** publishes the document with masked content and removes restrictions
-**Discard Redaction** undoes any changes, even if the Save button was used – the document is still restricted

12. A document that was redacted will display a green shield in the Documents Grid.