

How to Designate a Document as Restricted

TI version 10.8

APPLICABLE TO:

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

Designating documents as Restricted Content is the first step to begin applying redaction to documents in TI. This action protects documents from being accessed by any users not having special designated 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.



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



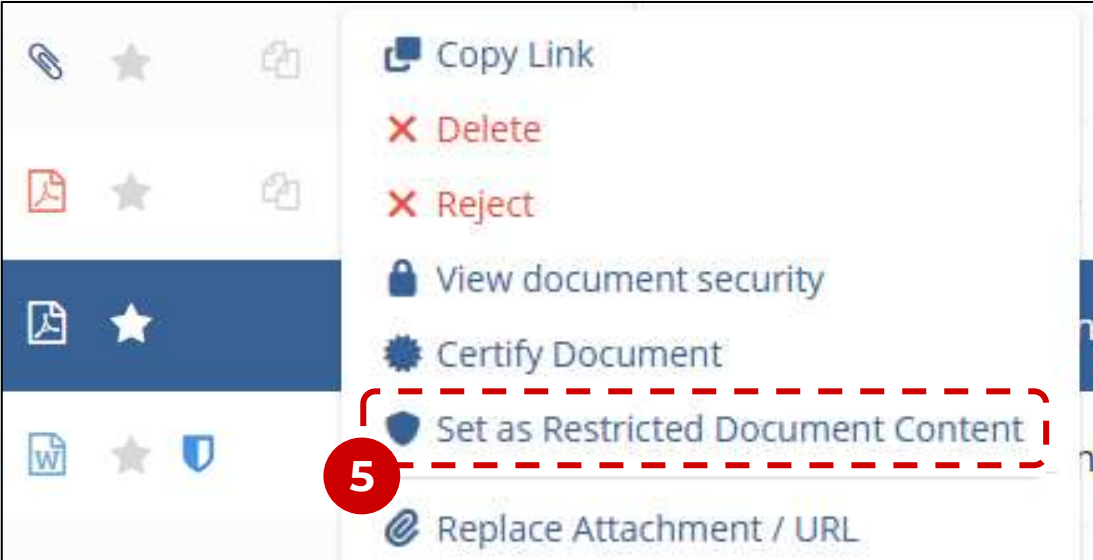
3 Complete your upload as usual. A shield mark indicates restricted document(s).



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**.



How to Designate a Document as Restricted

- 6
- Read the message describing what restricting documents does.
Confirm with **Yes**.

Set As Restricted Document Content

X

This option will lock the un-redacted (source) documents only to users with the permissions to access the original documents, and all other users will have access only to the redacted documents.

No

Yes

- 7
- The document is now restricted. It will be marked with a **blue shield** indicating Redaction has not started.

