

## APPLICABLE TO:

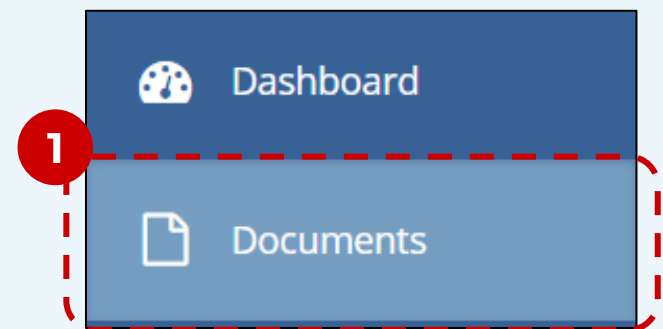
- Admin
- Manager
- Editor
- Reader
- eTMF
- eISF



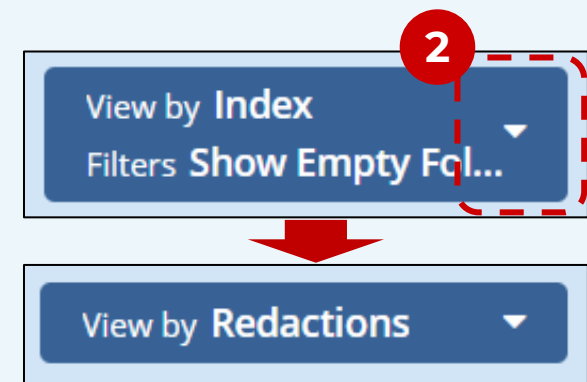
Users may only perform redaction if they have been assigned the respective action by an Administrator (via the [User Management](#) module).

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

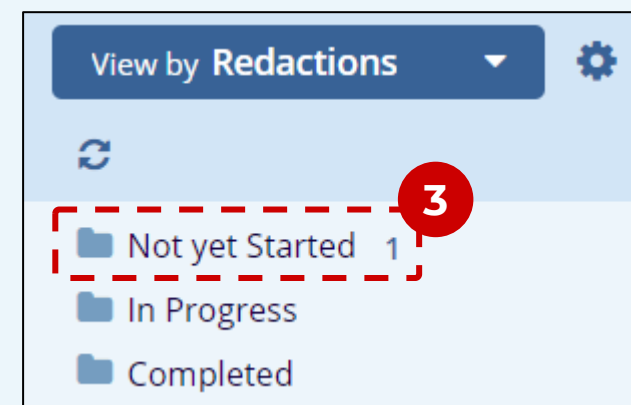
**1** Log in to a room, and navigate to the Documents module.



**2** Using the [View selector](#), switch to the **Redactions** view.



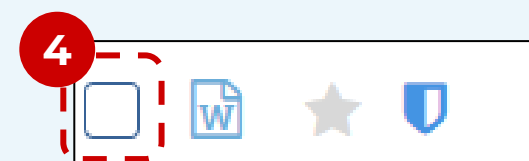
**3** Documents awaiting redaction are stored in **Not yet started**.



**4** Select a document.



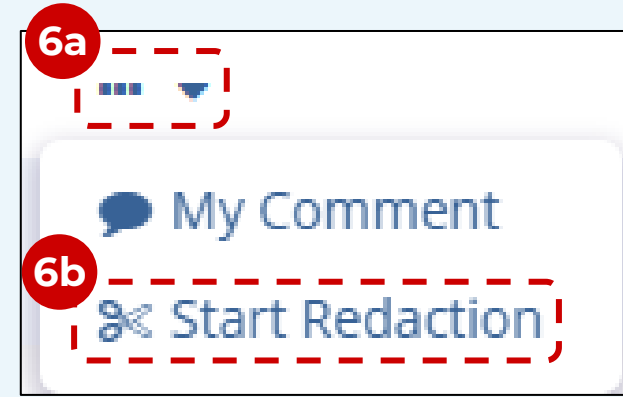
**Note:** Documents under redaction are marked in grid views with a shield – the color indicates at what stage of Redaction the document is.



**5** Switch to **Document View**.



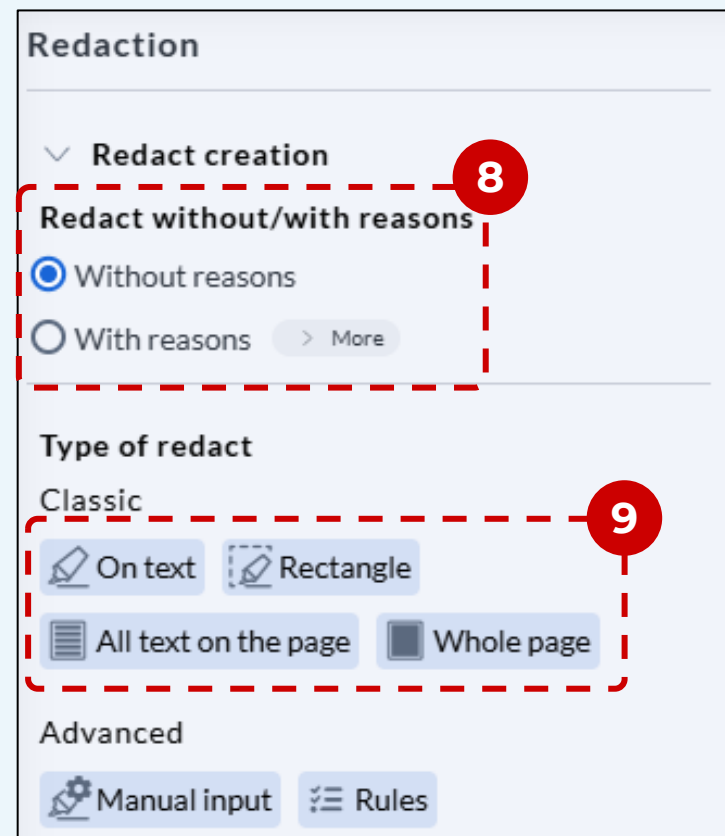
**6** Expand the More Actions list (ellipsis button), then click **Start Redaction**.



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

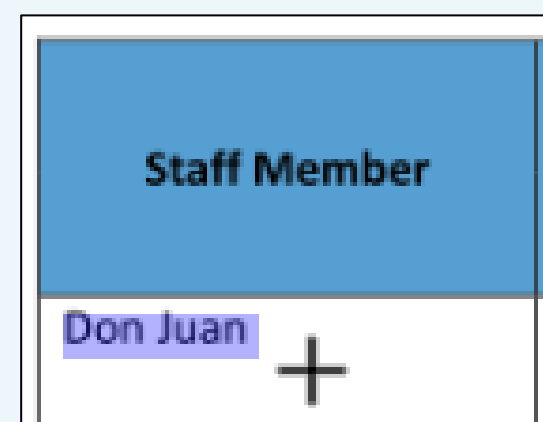


**8** Choose your preferred style of redacting.

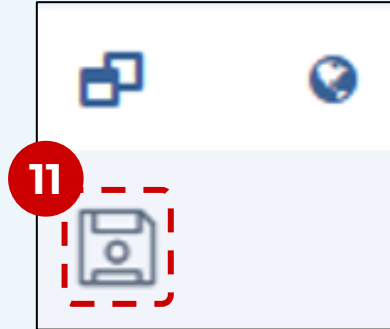


**9** Select **how** you will apply the redaction.

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



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

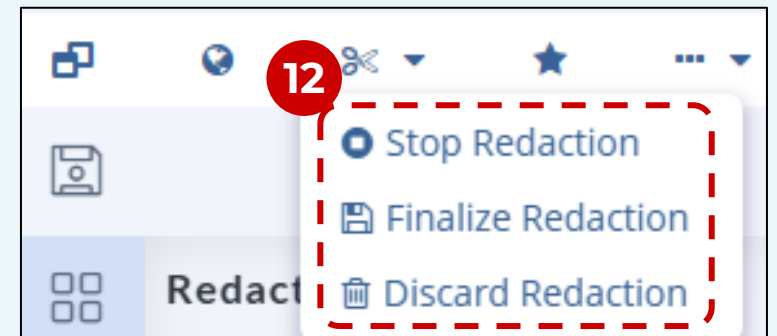


Principal Investigator: \_\_\_\_\_  
Protocol #: \_\_\_\_\_ TYP-0034 \_\_\_\_\_

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

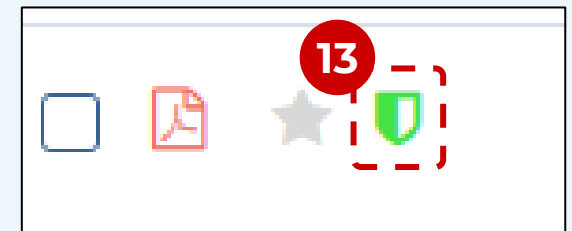
- 12** Expand the **Complete Redaction** (scissors icon) menu in the ribbon and choose one of these options:


**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.

- 13** 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.