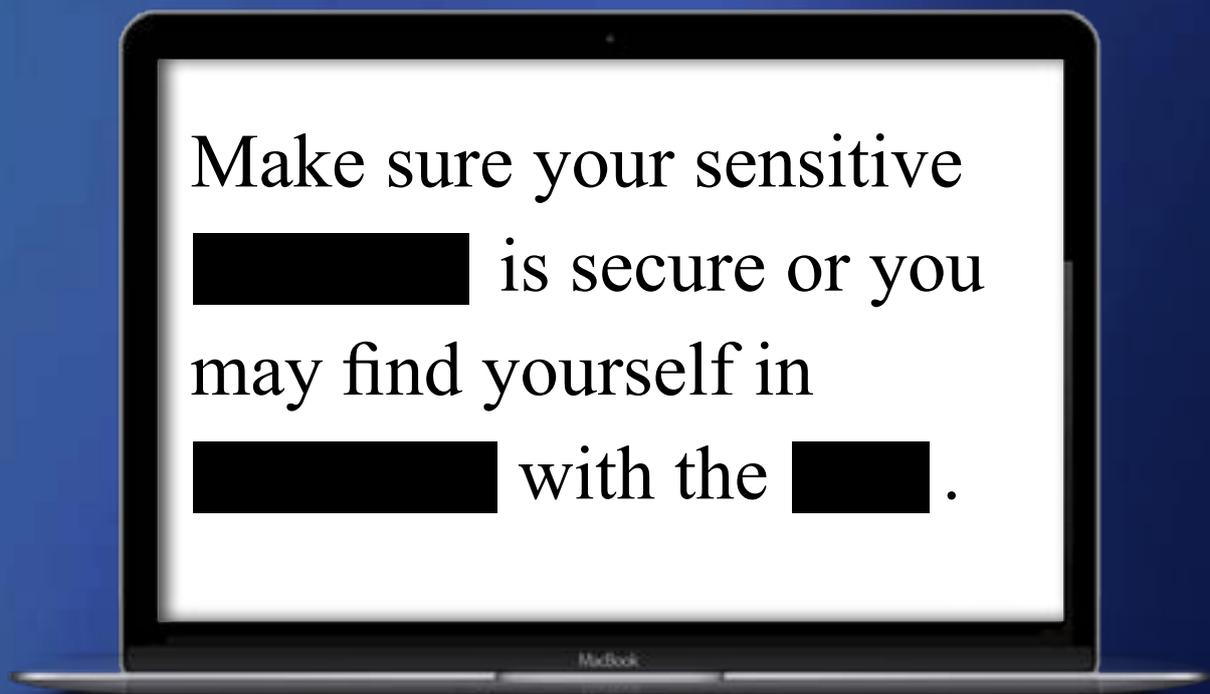


User Guide



Redact. Review. Release.

e-Redact is a fast and effective document redaction software,
keeping confidential information hidden.

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Welcome to e-Redact

Welcome to e-Redact and to all the fabulous features the solution has to offer.

As a user, you will start benefiting immediately from this fast and effective document redaction software that has been specifically designed to improve efficiency, productivity and save valuable money in the process – all whilst looking after the environment, reducing paper waste and saving valuable trees.

It is useful to note that e-Redact is compatible with Microsoft Office documents such as Word, Powerpoint Excel as well as Adobe Acrobat PDF documents.

e-Redact user guide

In this user guide, you will find information on how to use e-Redact including a step-by-step guide through its core features. There are handy hints and tips on how to get the most from the solution and each function is explained in detail with additional screenshots for visual guidance.

If there is anything you don't understand, we are here to help. Please email:

simon.head@footprint-solutions.co.uk.

Navigating around the user guide

It is worthwhile spending time going through the user guide to ensure you are familiar with all the functions available to you.

To be able to source information you are looking for quickly and to easily move around the sections, simply click on the title of the section in the 'Contents' page. This hyperlinked title will take you directly there.

e-Redact online resources

There is a variety of resources available online that can only be accessed by e-Redact customers. These can be accessed via the links below.

The resources include:

- > [e-Redact brochure](#)
- > [Detailed installation guide](#)
- > Access the 5 detailed training videos providing a detailed run through of specific features [HERE](#)
- > [PDF copy of this user guide](#)

Launching e-Redact

Launching e-Redact for the first time on your computer can be done in two ways.



From the desktop

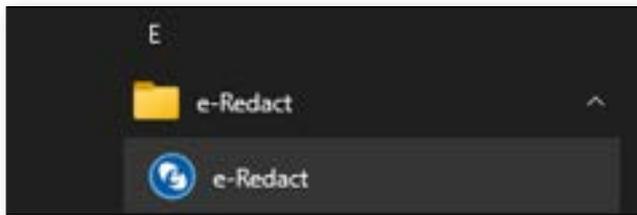
Press the e-Redact icon that was created when you installed the software.



From Windows Program Manager

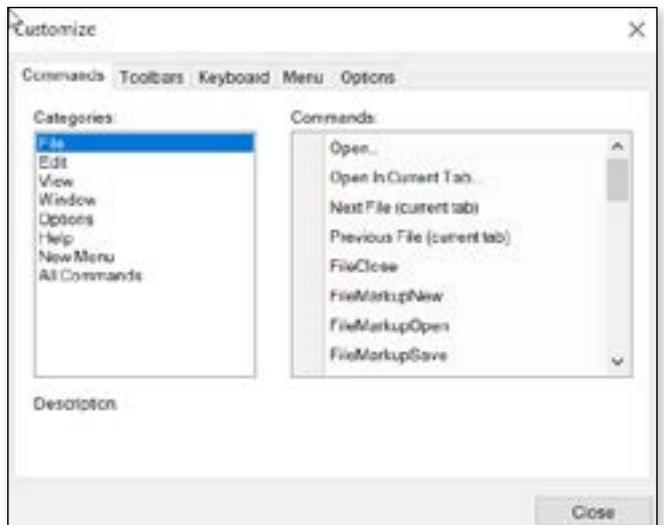
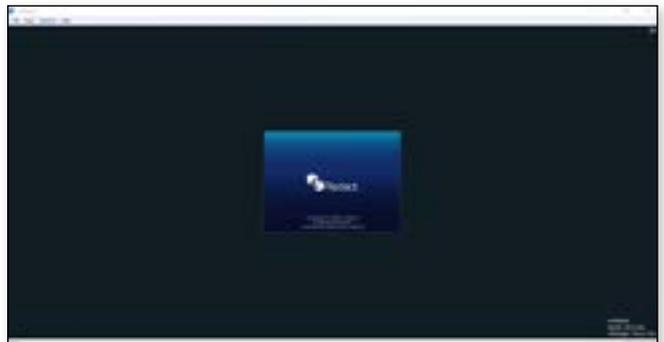
Click the Windows start icon in the bottom left of the screen.

Search for e-Redact on the list and select the icon to launch the program.



Launching e-Redact from the desktop or Windows

When initiating e-Redact from your desktop or Windows, the program starts and the following splash screen appears.



Selecting a file for redaction

To select a file for redaction, press 'File - Open'. The following screen appears.

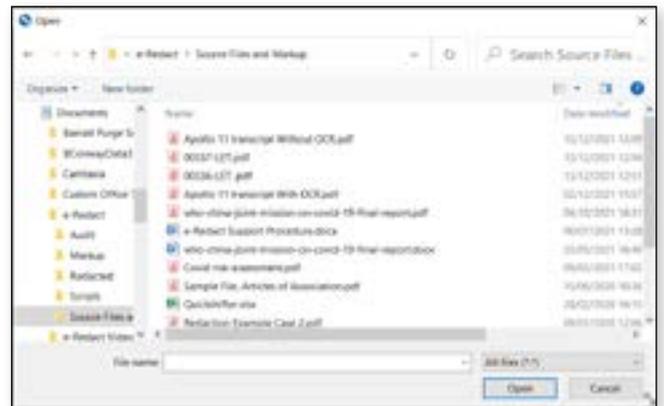


From here, a list of files appear that are available to the user for redaction.

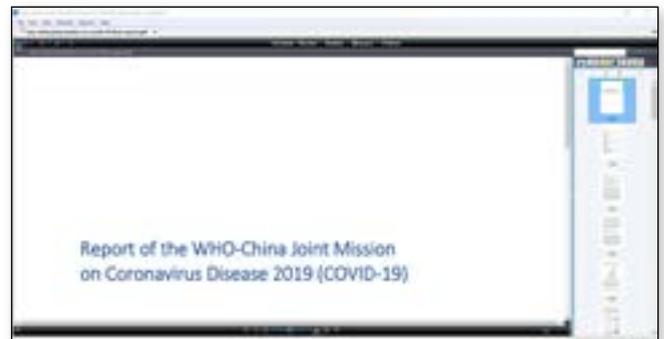
Opening a new file for redaction

When files are opened they automatically appear in the working environment. e-Redact does not alter the original document in any way – this is especially important for audit purposes.

When the 'Open...' option is clicked a list of files appears. Simply browse the list and select the file you wish to redact.



Then click 'Open' and the file will open within the correct environment, which in this case is Word. The thumbnails down the right-hand side of the screen allows for direct access to individual pages.



The working environment

Navigating around the e-Redact working environment is very straightforward. Using the thumbnails makes navigation quick and easy and there are lots of useful icons to help find your way around.

Thumbnails

Thumbnails are produced when the document is loaded in to e-Redact and enables fast, direct access to specific pages. When the thumbnail is selected, the page is loaded. To load additional pages, the slider bar on the right can be used.

In the example below, page 1 is selected for loading.



Selecting a page

To select a page from the document, use the selection mechanism at the bottom right of the page.

When a page is selected the thumbnails in the right-hand pane are automatically refreshed to align with the page number.



Opening and closing thumbnails

The thumbnails may be closed and opened using the up/down slider mechanism on the left of the thumbnails. Here is the slider out of situ.



Zoom tools

Zoom tools are provided to enlarge the document and are located in the bottom tool bar.

There are a number of other helpful tools provided in this tool bar which are detailed below.



Rotate page

This tool enables a page to be rotated and can be particularly useful when a page has been scanned in the wrong orientation.



Magnifying glass

The magnifying glass tool allows the user to select a section of the page and make it larger.



Zoom to page height

This zooms the page to full page size.

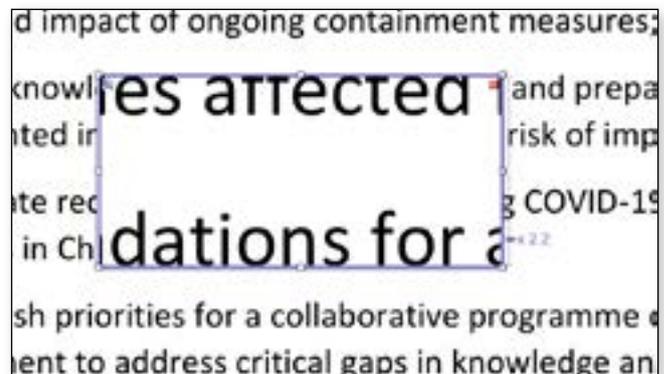


Dynamic zoom tool

This is most useful when working with scanned documents that have hand written text of differing sizes. The size of this magnifier may be altered by dragging out the zoom box shown below.

Zoom to page width

Using this tool increases the page width and is the most common option selected from the zoom toolbar.



Dynamic zoom

This is a slider and may be used to zoom in to or out of a document.



Pan tool

This enables the user to rotate the view point to secure a panoramic effect. This is used to greatest effect when zoomed to width.



Zoom window

This enables a window area to be zoomed in within the current page view. When invoked a magnifier appears.



Redaction tools

Now the document is ready to be redacted. To do this, locate the 'Redact' option on the top toolbar and select it.



Once the 'Redact' option has been selected, a toolbar appears on the left-hand side of the working environment.



Redaction commands

There are a variety of redaction icons located within the tool bar on the left of the screen and each one has a specific redaction command.



Optical character recognition (OCR)

All of the redaction commands can be applied to any document that has an Optical Character Recognition (OCR) layer included.

The redaction toolbar to the left shows a document with the OCR layer included.

Enabling 'Optical Character Recognition' (OCR)

e-Redact has the ability to build an 'Optical Character Recognition' (OCR) layer for a scanned document that has no OCR which would then offer up the additional redaction commands.

To generate an OCR layer, select 'Options' from the top toolbar. Then select 'Settings' and ensure the 'Perform OCR' box is ticked.



Documents without an 'Optical Character Recognition' (OCR) layer

If a document does not have an OCR layer the number of icons on display is less as text cannot be selected or search terms built.

The only command that could be applied is the rectangular and polygon redaction tools, as well as the option to allow text to be unredacted in a redacted area and the page delete function.

The redaction toolbar to the left shows the redaction toolbar with no document 'Optical Character Recognition' (OCR) layer included.

When the document is opened, the e-Redact software automatically applies the OCR layer as a default function. To avoid an OCR layer being generated this option requires turning off.

For security purposes the OCR is only available during the current document edit session. If this session is closed and then reopened the OCR layer would need to be regenerated.

Note: The accuracy of character recognition is determined by a number of factors including age of the document, resolution and quality of the original scan.

Note: It is not advisable for OCR documents to include hand written text as this would provide unreliable results.

Redaction tools - continued

The selection tool

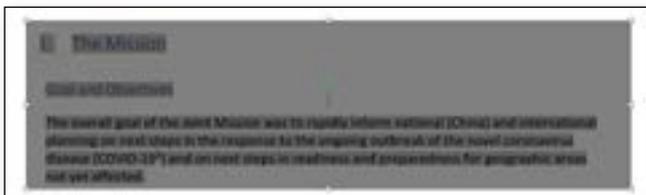


The selection tool is used to select the area to be redacted.

For Window based redactions the selected area may be expanded or contracted using the corner points of the grey overlay box.

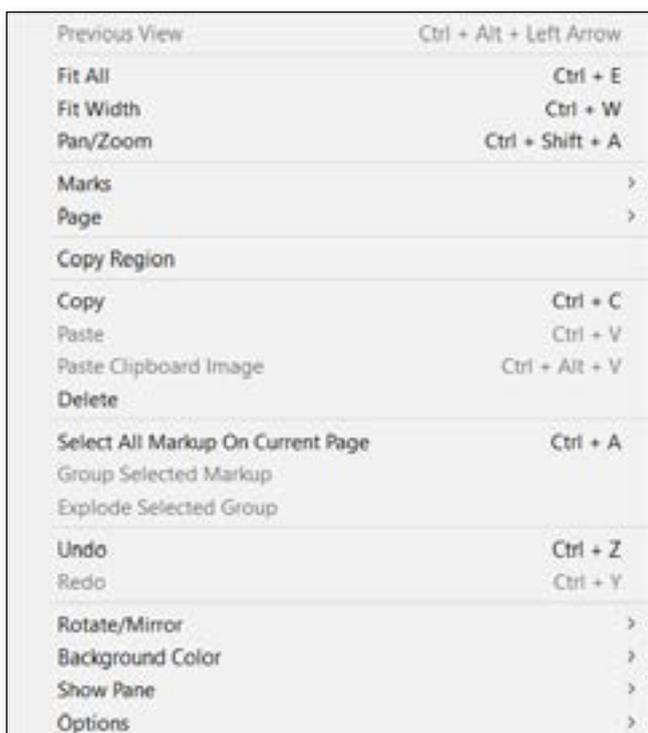
To rotate the redaction, click on the green centre point.

By holding the mouse button down the redacted area may also be moved.



Additional redaction edit options

Once the redaction has been selected, right click on the mouse and further edit options become available e.g. delete the redaction, move it or copy it. Some commands, such as move, can be done by just selecting the redaction and moving it.



Rectangular redact tool



This enables a rectangle to be drawn around an area to be redacted using the left-hand button of a mouse to create the points.

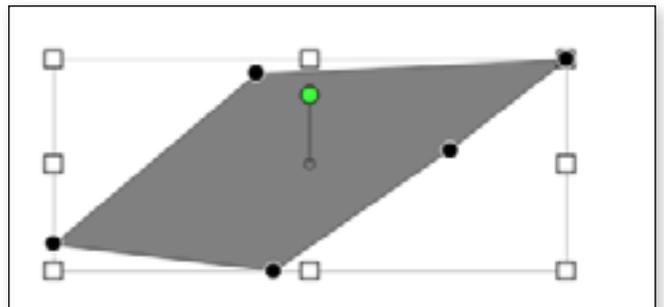
This would be the primary tool used with scanned documents where no OCR is included.

Polygon redact tool



This tool is used to redact a defined area where using a rectangular tool would take out too much information.

An example is where sensitive information has been added to a scanned document within a column. Points are created using the left-hand button of the mouse.



Text redact tool



Text may be selected anywhere within the document using the left button of the mouse.

This tool can save the user significant time as any instance of the selected text would be redacted automatically throughout the entire document.

Allow text to be unredacted in a redacted area



This function allows text to be unredacted within an area which has already been redacted.

This is achieved by clicking the left button of the mouse and selecting 'Allow area inside redaction' option. Then drag the box over the area you wish to redact.

Redaction tools - continued

Redact privacy tools

By clicking on this icon, the redact privacy tools appear.



The most useful element of this feature is in the redaction of emails where it searches for the format of email addresses.

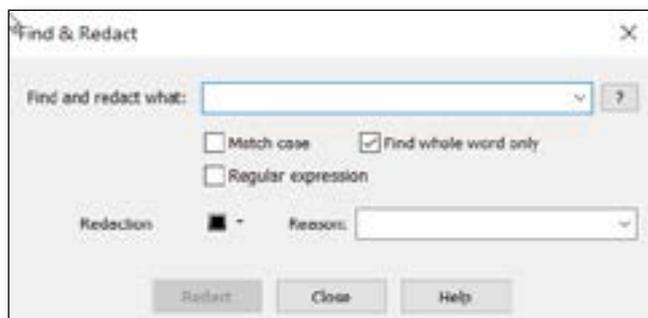


If there are specific email addresses that the user does not want removing then an exemption list can be created and those addresses could not be redacted.

Names, phone numbers etc are best maintained in a search term script library which are covered below.

Find and redact - words

This enables text and words to be searched and then redacted and is only available in the current editing session.



This is a powerful tool with the user having options to search for specific whole words or regular expressions. In the case shown words have to be entered in their exact format.

E.g. if 'child' is entered in to the dialogue box above the word 'child' would only be redacted. 'Child' in children or 'child' in childhood would not be redacted.

By ticking the 'match case' check box your search will be case sensitive.

Find and redact - expressions

Regular expressions can also be added to the dialogue box in the same way as words.

Regular expressions can include numbers and must be an exact replica of the sequence of words, letters and numbers entered in to the 'Find and redact' box for the feature to work accurately.

Redact From/To

This enables you to find a phrase and redact it to another phrase. The speed comes when this start and end phrase is then replicated throughout the entire document. E.g. in an email thread.



Simply enter the start of the phrase that needs redacting in the 'Find and redact from:' box and add the end phrase in to the 'To:' box situated below.



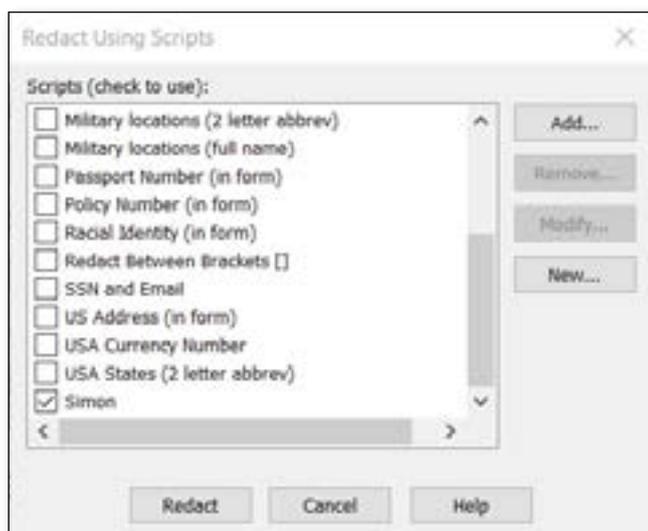
Redaction tools - continued

Redaction using scripts

Using scripts enables the user to maintain a handy library of search terms against multiple documents.



The list of search terms (or words) can be held against a number of documents. This avoids the user having to re-input the same list of words that commonly need to be removed. It also ensures a more thorough redaction process and saves time.



Adding, deleting and modifying scripts

The use of scripts can be switched on and off at the users discretion and may be created, deleted and edited on an ongoing basis

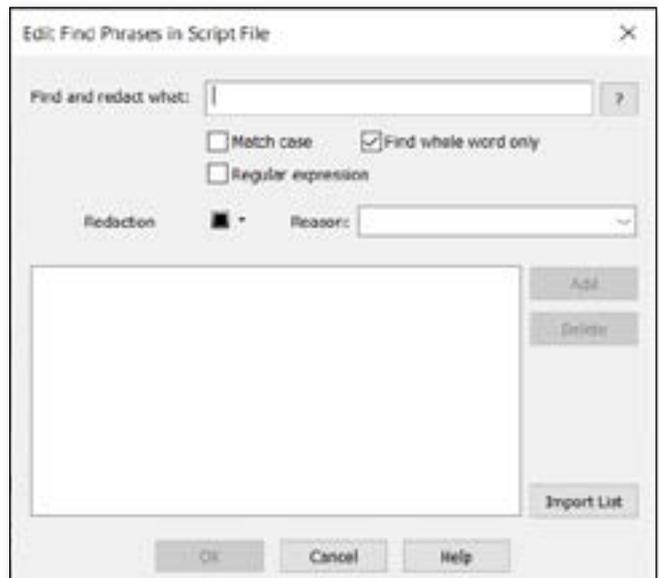
An existing library of search terms may be added which is especially beneficial if another user has created a library and wishes to share it.

Libraries can also be removed by selecting it and pressing the remove button. This does not delete the library from the file system but only deletes its availability within this user's e-Redact profile.

There is also the option to 'Modify' a library which allows the user to add and/or delete terms.

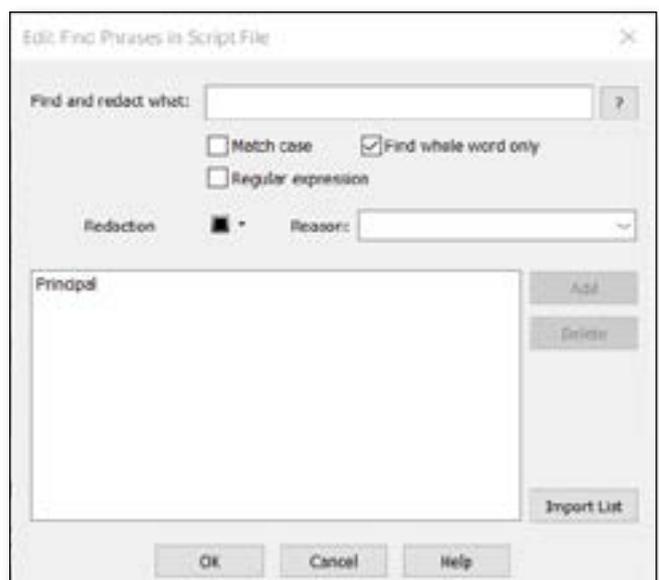
Creating a new library by adding a new search term

To add a new search term (or word), press the 'New...' button.



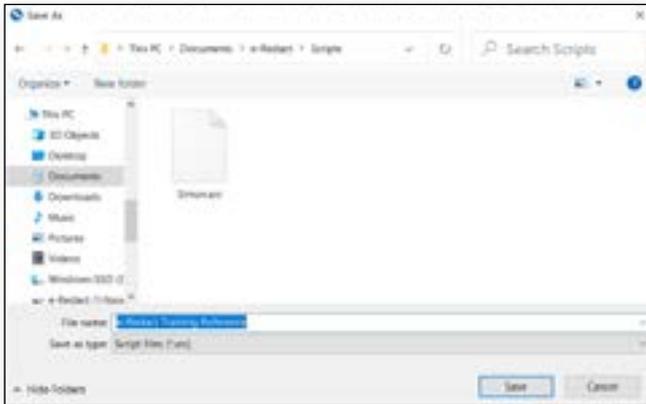
From this screen, it is possible to add a new search term. If a list of search terms is maintained in a .txt file it can be imported.

Below, the search term 'Principal' has been added.



Click on the 'OK' button and save the new script file by giving it a name. In the example given, the file has been renamed 'e-Redact Training Reference'.

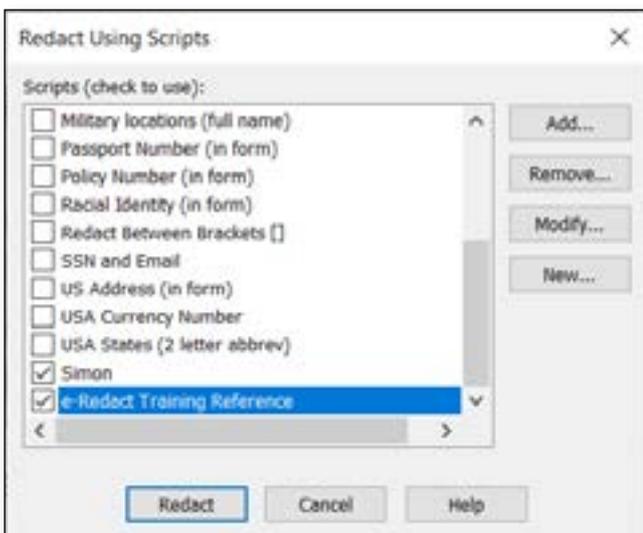
Redaction tools - continued



Note: It is possible to control the redaction colour and reason code for each word which is covered later on in the guide.

Managing search term libraries

When redacting, numerous search term libraries can be selected from the list. This means that, when the 'Redact' button is clicked, all words, numbers and expressions contained within the selected libraries are searched for and subsequently redacted.



Once the solution has completed running through all the requested redactions, a box is returned indicating the number of redactions created once the 'Search Terms' have been applied.

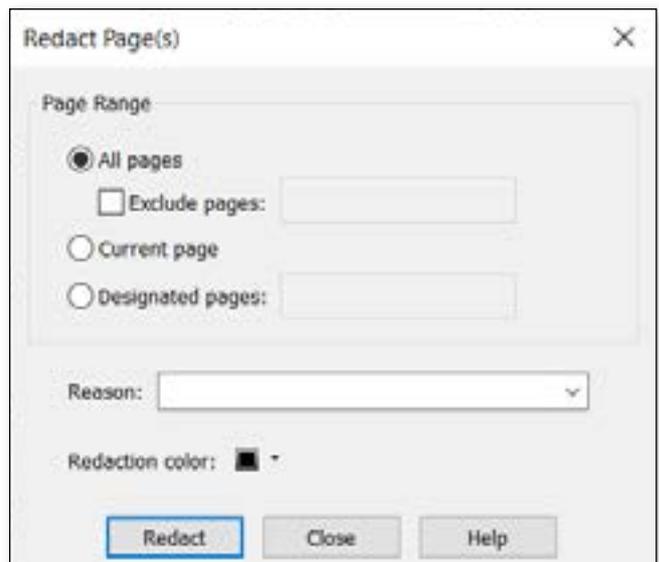


Page redaction tool



On pressing this button, the 'Redact Page' option appears.

This feature gives the user full control over which pages need to be removed from the document. An alternative white text colour can also be used within this feature which is useful for use on pages that appear in the 'Draft (Audit) copy version.



Redaction colours

Redactions appear in the default colour of black. However, there are alternative colours that can be viewed by clicking on 'Redaction color'.

The option to redact in a different colour is included in many of the e-Redact features such as page redaction and script (search term) redactions.

The option of choosing a different colour is shown in the toolbar below. The colour selected here is the default black option.



Annotation tools

Annotation tools enable useful notes or comments to be added to the redacted copy by a user. It helps to explain the reason for the redaction and saves time by selecting stamps that are already available from the e-Redact toolset.

Annotation toolbar

This toolset can be launched by selecting the 'Annotate' icon on the top application toolbar.



By clicking on 'Annotate', the annotation toolbar appears down the left hand side of the screen.

Let's take each feature of the annotation toolbar in turn.

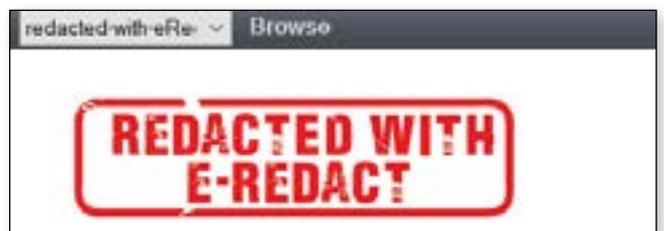
Text annotate tool

This enables text to be added to the redacted document. When this feature is selected, a box may be drawn using the left button of the mouse. The user has full control of the colour, size and case of the text. The purpose of this function is to add additional annotation to the redacted document e.g. describe the reason why redactions have been applied.



Image annotate tool

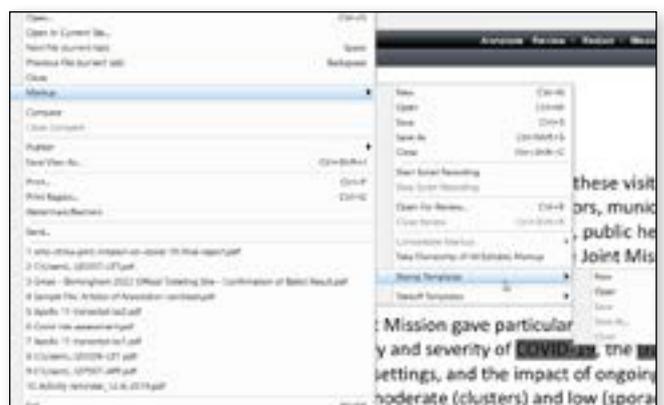
This enables the user to select an image file (.jpg, .png etc) and then apply the image to the redacted document. Once applied, these images can be viewed from a drop-down list which allows the individual to select the image at a later date.



Creating stamps

The stamps provided by the solution may not meet the user's bespoke annotation needs. However, there is an option to create your own unique stamps within the annotation tools menu. To do this is quick and easy but can be achieved from within page 1 of the document being redacted.

To create a stamp, simply click 'File' – 'Markup' – 'Stamp' – 'Template' – 'New'.



Stamp tool

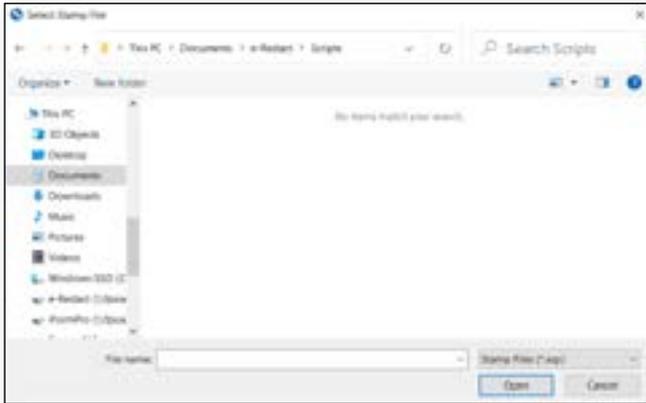
There are 2 options available within the stamp tool function - opening a stamp file and adding a signature.



Annotation tools - continued

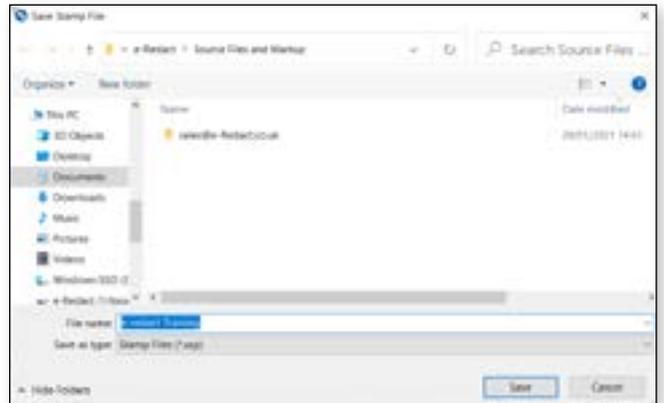
Opening a stamp file

In the example below, the user is opening a 'Stamp File (.xsp)'.



Saving a stamp file

The stamp can be saved using the file browser which enables the user to give the stamp a unique file name.

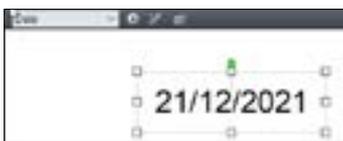


Adding a signature

Once a stamp file has been opened, a signature can be added to stamp the document. When using a signature there are several options available to the user including initial, date, title etc. Signature options can be added by using the left button of the mouse.



An initial is being added here.

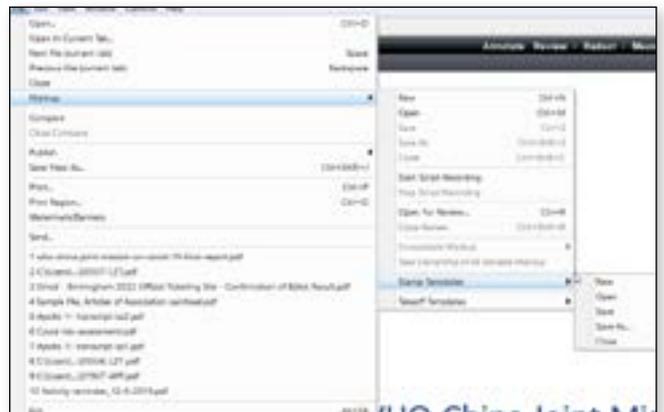


This example is showing a document being stamped with a date.

Selecting a saved stamp

The process of choosing a stamp is easy. Under 'File' you can select the stamp by clicking 'Markup' – 'Stamp Templates' – 'Open'.

If the user has just created a newly saved stamp, e-Redact will need to be closed and restarted to be able to select it.



Draw tools

These useful tools enhance the redacted copy with arrows, lines and other shapes. These are added using the left button of the mouse.



Changemarks



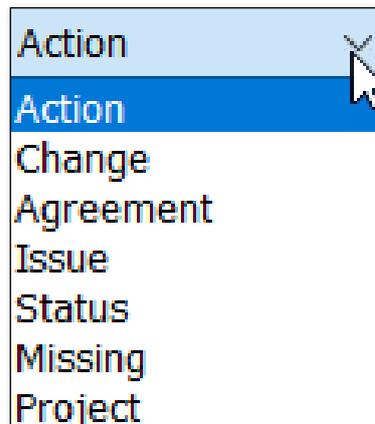
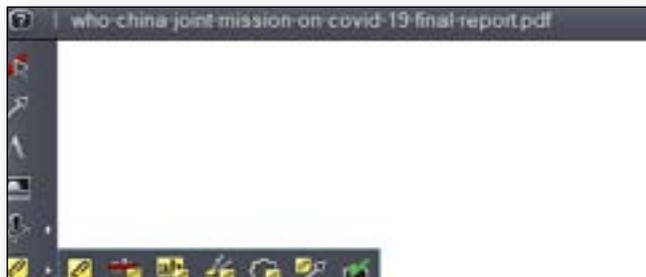
Changemarks enable the user to add detailed annotations to the 'Draft' or 'Redacted' documents and offer the user advance collaboration tools.

This function becomes particularly useful if the user wishes to include extra details or comments about the redactions made and then share these with other members of an internal team.

Changemarks is an optional function and are captured when the markup file is saved.

The changemark toolbar

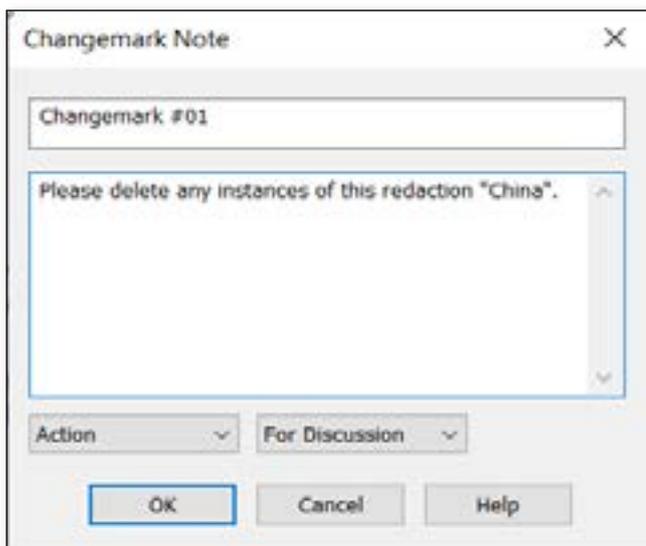
There are many different functions available from the toolbar which can be accessed from the 'Annotate' menu.



This example shows the list of options available when the 'Action' icon is selected.

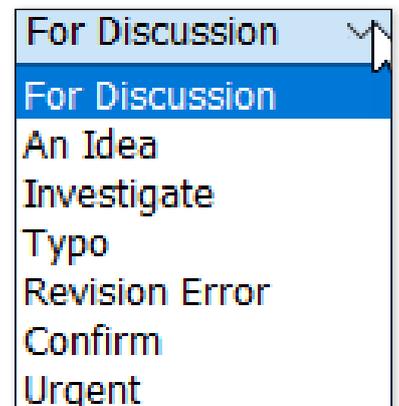
Changemark note

By clicking the changemark icon a box appears prompting the user to enter their comments. The changemark definition can be edited here (In this case Changemark #01).



Within the 'Changemark Note' dialogue box, there are 2 drop down lists named 'Action' and "discussion".

Adjacent to the 'Action' icon is the second drop down list 'For Discussion' which offers pre-defined statements offering further information.



Strikeout of changemark text

This function enables text to be striked out which proves useful when the text behind the redaction needs to still be readable. This is only available where an OCR layer for the document exists.



Highlighting changemark text

This is useful when the user requires individual words or sentences to be highlighted and for these to still remain visible. This is only available where an OCR layer for the document exists.



Changemarks - continued

Highlighting changemark text with blocks

Using this function allows text to be highlighted as a block which can be drawn using the left-hand button of the mouse.



Changemark cloud

Clicking on this icon enables text to be highlighted using a cloud which can be drawn using the left-hand button of the mouse. A character OCR layer is not required with this feature.



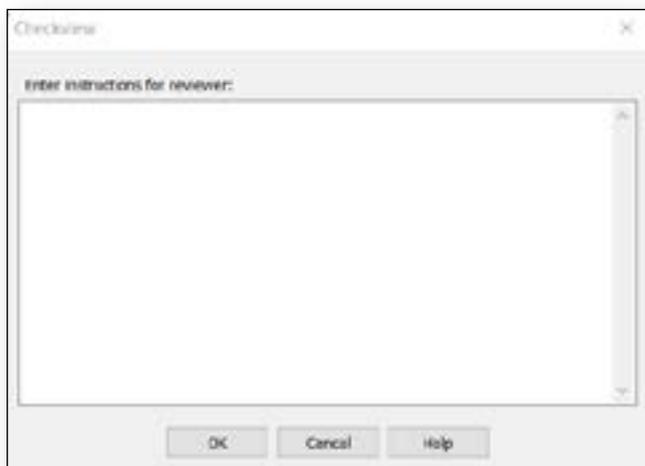
Changemark arrow

This enables text to be indicated and highlighted using an arrow and can be drawn with the left-hand button of the mouse. A character OCR layer is not required with this feature.



Checkview

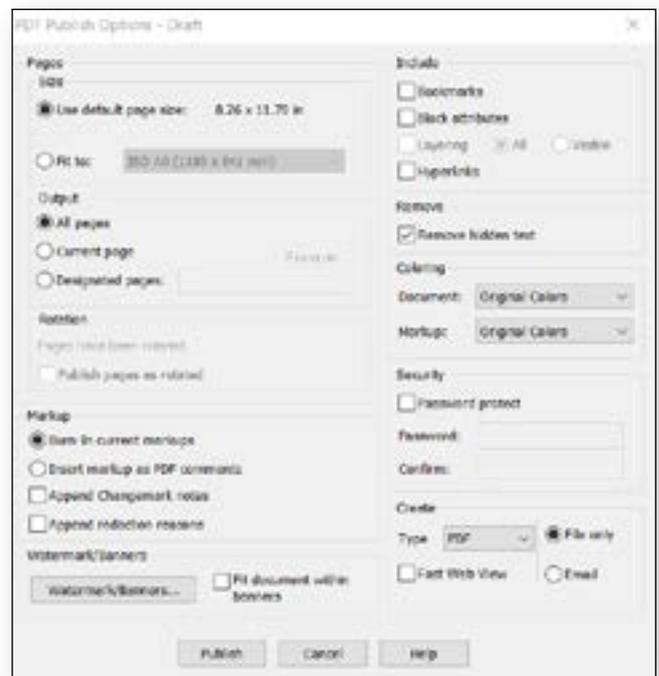
Checkview is an open text box that provides an option to include bespoke instructions for the reviewer. It is a useful tool as it provides feedback and further insight for the reviewer. A character OCR layer is not required for this feature.



Creating the draft audit copy with changemarks

Generally, changemarks are used when internal verification is required. Changemarks can be easily appended to documents by ticking the 'Append Changemark Notes' checkbox, under 'Markup'. Doing this provides a list of changemarks on each page showing where each has been applied along with any corresponding notes.

In most situations, this feature would only be applied to a Draft (Audit) copy. However, it can also be applied to the redacted Adobe Acrobat PDF copies to provide additional information to the document requestor.



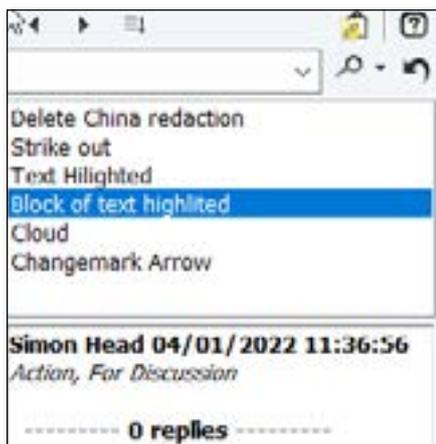
Changemarks - continued

Navigating changemarks

Changemarks can be found throughout the document by selecting the navigation tool on the right-hand section of the screen.



The type of changemark can be searched for or selected using the drop down list shown below. A summary of the note is provided when each changemark is selected individually.



Deleting changemarks

Changemarks can be deleted by selecting 'Delete' on the user's right-hand mouse.



When deleting or editing changemarks made by another person, the markup file has to be taken control of by the current editing user.

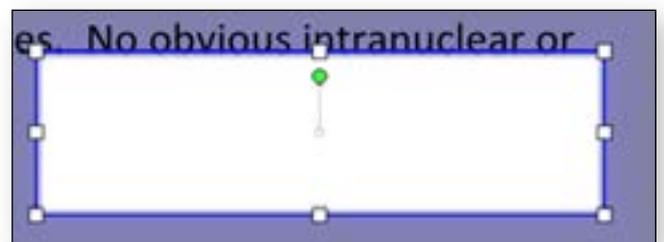
Navigating checkviews

Checkviews can be navigated throughout the document by selecting the navigation tool on the right-hand side of the screen.



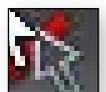
The screenshot opposite shows a summary of checkviews and the current state of each one.

Further instructions are provided when each Check View is selected individually.



Deleting checkviews

Checkviews may be deleted by selecting 'Delete' from the right-hand mouse.



To be able to delete or edit a checkview made by another user, the markup file has to be taken control of by the current editing user.

Review

To review the document before publishing it, click on the 'Review' icon within the working document found on the tool bar shown below.



Annotate Review - Redact - Measure - Publish

Publishing files

There are two ways of publishing files. These are:

- > The audit and redacted copy can be published through the 'Redact' menu toolbar.
- > The redacted copy only can be created through the 'Publish' menu toolbar.

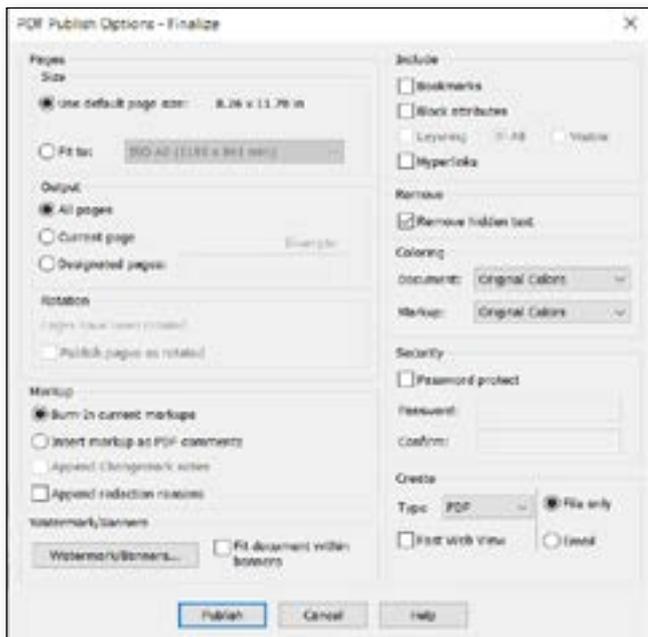
The audit and redacted copy

The audit (draft) file indicates where redactions have been applied within the copy. These are displayed as an opaque layer in an Adobe Acrobat format.

Creating the audit file

When creating the audit file and before publishing it, there are a number of options available e.g. whether all, some or one of the pages are to be selected, whether the file is to be password protected etc. Any changes made to the audit file will not impact the original as this file remains unaltered.

In this example, all pages are to be published in the default paper size (A4) as a pdf and with no password protection. It is normal to leave the option to include 'Bookmarks', 'Block attributes' and 'Hyperlinks' unticked and for the 'Remove hidden text' option to be ticked.

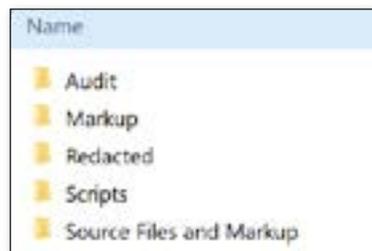


When choosing file type, select the pdf option as this is the most common output and ensures readability across networks.

Once the 'Publish' icon is selected, the user will be prompted to save the file.

File structure for saving files

It is recommended to create a structure to save redacted files and to maintain this filing system ongoing. This ensures files are saved in a logical manner and can be easily sourced when required. Files are maintained within the client's network and standard



Windows security is used to control their access. The example below shows the files stored within clearly titled folders defined by their redaction status.

The audit copy

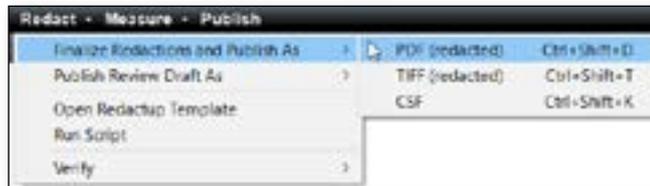
The audit copy shows the opened file with the redactions appearing as an opaque layer. Below is an example of how this might look as a PDF.



Publishing files - continued

Publishing the audit file

The audit file can be published by clicking on 'Redact' – 'Publish Review Draft As'.



Redacted file

The redacted file is the final file that can be safely released to the original requestor or in to the public domain. It has all information removed and cannot be reversed engineered to reveal any of the text under the applied redactions. The format of this redacted file is normally in Adobe Acrobat.

Creating the redacted file

The redacted file can be created in 2 ways:

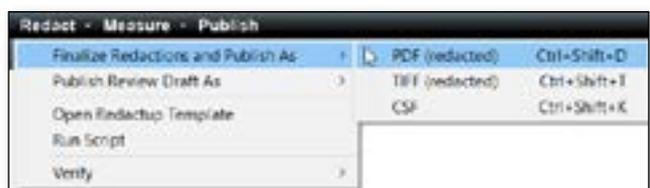
- > From the 'Redact' menu option
- > From the 'Publish' menu option

Regardless of how the file is created, it is recommended that 'Publish to PDF' is selected as this is the option that most PC users will be able to open and read.

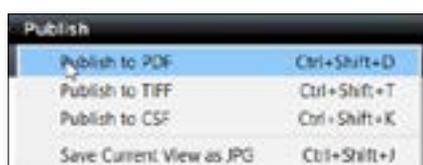
From the 'Redact' menu option

From the main redaction tool bar click 'Redact' – 'Finalize Redactions and Publish As' – 'PDF (redacted)'.

From the 'Publish' menu option



The redacted copy file



Once the file has been published, all redacted copy has been removed and any data held can no longer be read. This can be clearly seen in the example provided below.



Markup file

The markup file is an overlay which is applied to the original document. This form of publishing provides a number of benefits.

- > For work to be saved and to be opened at a later date
- > For redactions on a document to be shared with other team members
- > To provide an audit of who created redactions and when
- > To provide an option of creating redaction templates where sensitive data is redacted from the same area of a page (s) across multiple documents. An example of this may be a direct debit form which contains account details.

Setting up markup files

Markup files is an overlay that shows the redactions made leaving the original document untouched.

To set up a new markup file, go to the 'Options' settings found in the top Windows toolbar.



Publishing files - continued

Saving a markup file

Markup files can be saved by selecting the save button found on the application toolbar. As a default these files are saved in the 'Source Document Folder', under the same name as the original file, with an extension of `_pdf.xml` (if the pdf option has been selected).

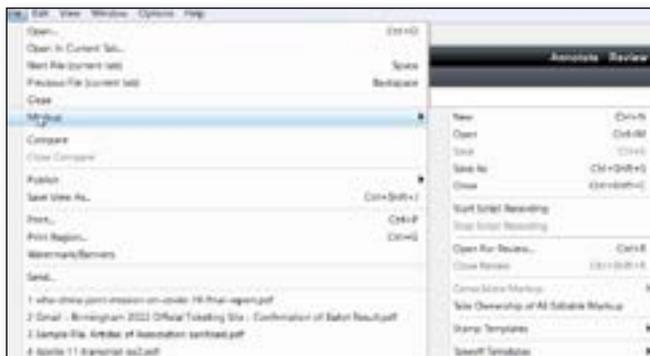


If 'Source Document Folder' is not configured, a dialogue box appears prompting the user to save the file in their preferred alternative location.

Opening up a markup file

Any markup file can be opened by other users from a different location by selecting the 'File' - 'Markup' - 'Open'.

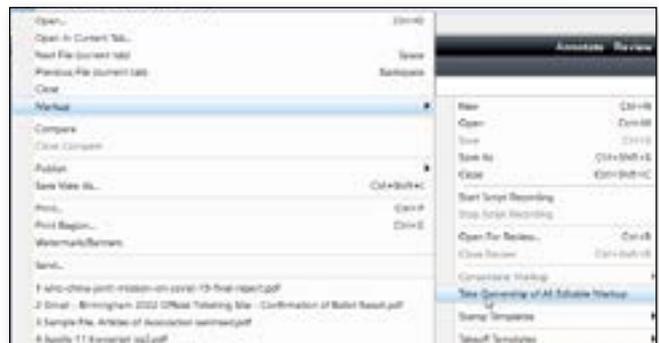
All work must be saved by the original user first before it can be opened by another user otherwise any work in progress could be lost.



Taking control of redactions created by another user

When opening a markup file created by another user, the already captured redactions are viewed as read only. The current user can then record their own redactions on the document with their name, date etc.

However, if the current user wishes to edit the redactions created by the previous user, they have to take control of all the editable redactions made on the document and not just that individual one. This can be achieved by clicking 'File' - 'Markup' - 'Take Ownership of all Editable Markup'.



Using the markup file as a template

If a user has numerous documents of the same type, where the area to be redacted is in the same place, then a markup file may be used as a template and saved under a unique file name.

Audit information of redactions on a markup file

When a markup file has been saved and the file is reopened, basic audit information about each redaction can be viewed within a yellow audit box. This provides other users with additional information e.g. author, date etc which is particularly useful when evaluating who made the redaction and when.



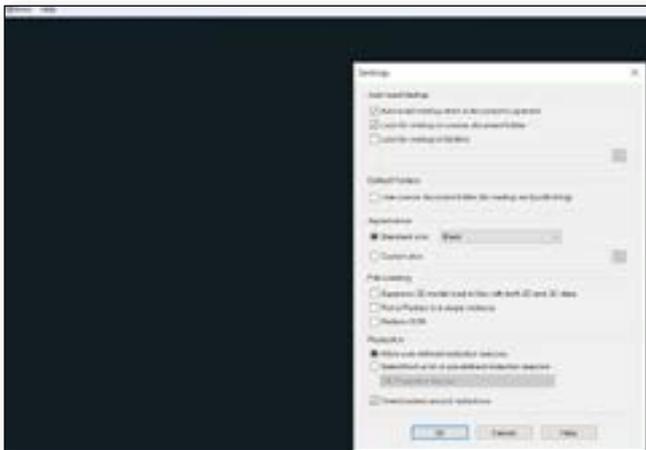
Reason (or exemption) codes

Reason codes are used to indicate why redactions have been applied. Some clients use standard codes and others use those published by the Information Commissioners Office (ICO).

Turning reason codes on or off

'Reason Codes' are supported by e-Redact and can be set up by going to 'Options' – 'Settings'. By default, reason codes are set as 'Allow user defined redaction reasons'.

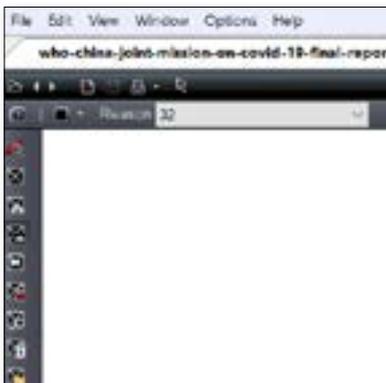
In this case, reason codes are not available. However, it is possible to apply for them by choosing the 'Select from a list of pre-defined redaction reasons'.



Selecting reason codes

When applying redactions, reason codes can be selected from the 'Reasons' drop down list and can be set when creating search terms, deletion of pages, adhoc redactions etc.

With adhoc redactions, the correct code has to be selected before the selected text can be redacted.

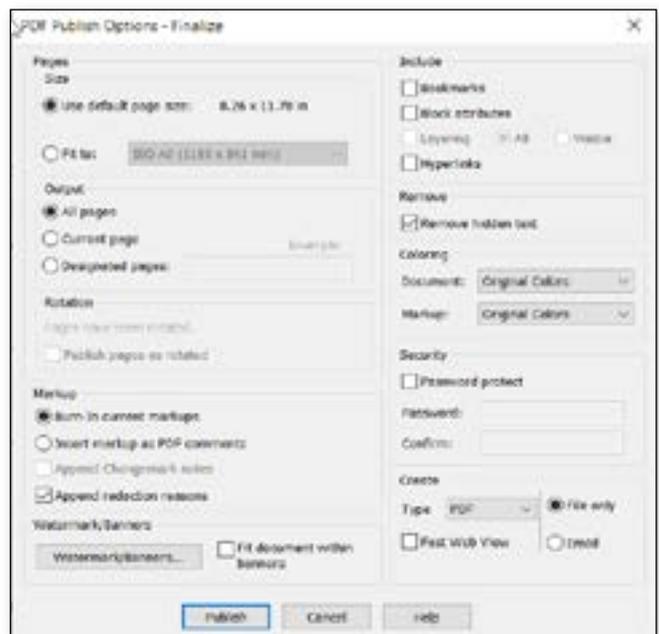


This example shows the user selecting 'Reason' code '32' prior to creating an adhoc redaction.

Appending the redacted or audit report with a summary report

On creation of both the draft copy and the redacted document there is the option to attach a simple report to the document summarising where terms have been applied and the reasons for them.

From the page 'PDF Publish Options – Finalize' go to the 'Markup' section and tick 'Append redaction reasons'.



Redacted document with reason codes applied

The redaction codes are automatically applied to the redactions and are scaled automatically to the size of the redaction without any extra effort from the user.



Report content

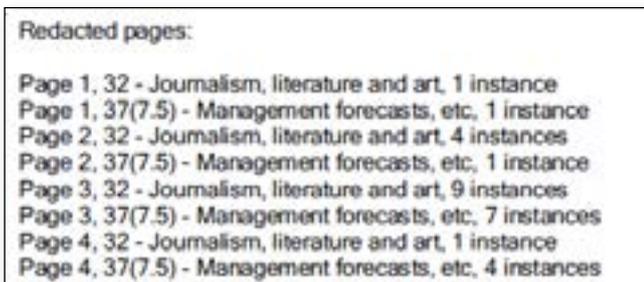
The appended reason code report is a useful document that indicates:

- > The number of redactions
- > The codes used
- > The definition of codes used
- > The code instance on a page basis

The example below shows a published appended reason code summary report.



This example shows a redacted page summary.



Customised reason code list

Quite often, organisations only use a partial list of reason (exemption) codes'. These can be created and saved in a CSV format under C:\Program Files (x86)\Footprint\e-Redact\Standard Reason Files.

Customised lists are created by a customer dependant on their requirements. For more details about creating your own reason code list, please contact e-Redact support.

e-Redact training resources

There is a host of training resources available to all e-Redact users including online videos, a brochure and an installation guide at www.e-Redact.co.uk/help

Help

For any further help or if you have any sales enquires, please email simon.head@footprint-solutions.co.uk

Alternatively, contact the office on 01565 873 918 or email sales@e-redact.co.uk