



# USER MANUAL

**Foxit  
Smart Redact Server**

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# Introduction

Foxit Smart Redact Server provides an intelligent and automated solution designed specifically to protect sensitive data across diverse digital assets. Powered by advanced artificial intelligence, it enables enterprises to discover, classify, and manage sensitive data efficiently, ensuring robust compliance with data privacy regulations such as GDPR, CCPA, CPRA, and HIPAA.

## Key Features

- **Intelligent sensitive data discovery**  
Foxit Smart Redact Server automatically scans and identifies sensitive information within large volumes of documents. It supports rapid detection of Personally Identifiable Information (PII), Protected Health Information (PHI), aligning seamlessly with regulatory requirements.
- **Comprehensive file format support**  
The server supports 47 mainstream file formats, including PDF, Microsoft Office documents, text, image files, and HTML documents, eliminating manual file conversion and streamlining sensitive data identification.
- **Extensive data source integration**  
Foxit Smart Redact Server integrates with popular cloud and storage services, such as Google Drive, OneDrive, Box, AWS S3, SharePoint, Exchange Online, and NetDocuments, continuously expanding its compatibility with more platforms.
- **Centralized privacy dashboard**  
The intuitive dashboard offers a unified view of sensitive data distribution within an organization. Users can quickly assess the presence of sensitive information, identify types of sensitive data, and locate specific documents, enabling prompt and informed action.
- **Advanced search capabilities**  
Results from data scans are easily navigable with advanced filters including document type, sensitivity levels, and entity categories, significantly speeding up document retrieval processes.
- **Privacy protection features**
  - **File mover functionality**  
Post-discovery, users can manage sensitive documents efficiently through the

built-in File Mover feature. It securely relocates documents to designated areas or separate storage solutions, significantly enhancing data protection and compliance auditing processes.

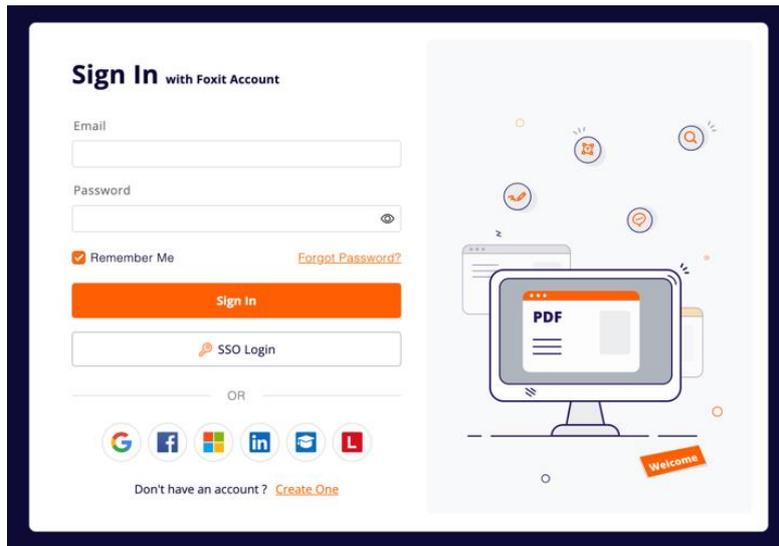
- Auto-redaction  
Foxit Smart Redact Server provides automatic redaction capabilities, eliminating sensitive data from documents based on user-defined parameters or natural language commands, streamlining the process with zero learning curve required.
- Entity auto-correlation (roadmap)  
Employing natural language processing, the server automatically establishes relationships between discovered sensitive entities, allowing users to execute complex natural language queries, such as identifying specific transactional documents rapidly.
- Project-based management  
The solution supports robust project management capabilities, enabling administrators to define specific scanning criteria tailored to individual privacy projects. This includes detailed rule configuration, entity selection, data source integration, file-type specifications, and scheduling preferences, allowing for customized, precise sensitive data management.
- Team collaboration  
With role-based management, the Smart Redact Server enhances collaborative workflows through three defined roles: Admin, Manager, and Member. Teams can effectively manage projects and sensitive data tasks, fostering efficient communication and precise control over sensitive information handling.

## Getting Started

### Login

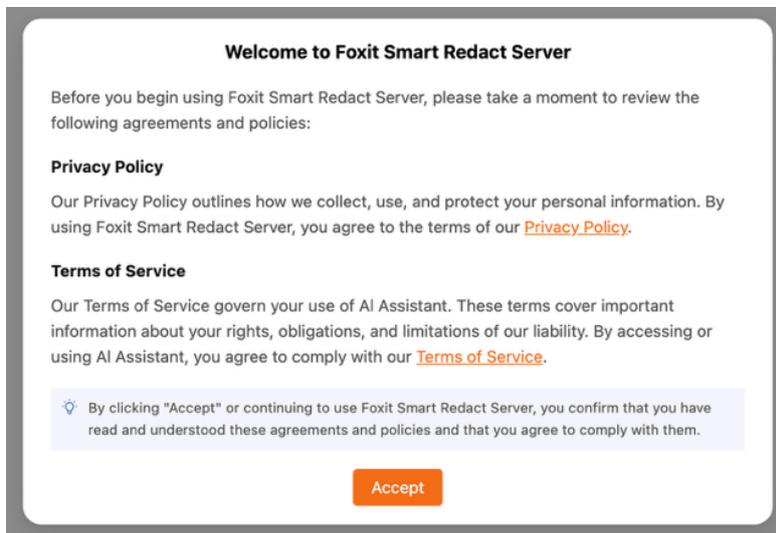
First, you need to log in to Foxit Smart Redact Server (hereafter referred to as Smart Redact Server.) using your Foxit ID. You will only be able to use or subscribe to the Foxit Smart Redact Server service after you have successfully subscribed to the Foxit PDF Editor+ plan.

Fill in the Email and Password fields for your Foxit ID, then click the **Sign In** button to log into Smart Redact Server.

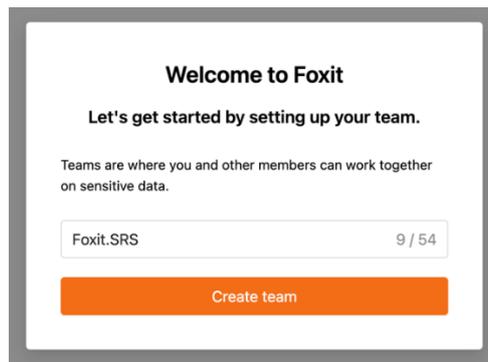


## Create a Team

When a user logs into Smart Redact Server for the first time, the system will first display a Privacy Notice.

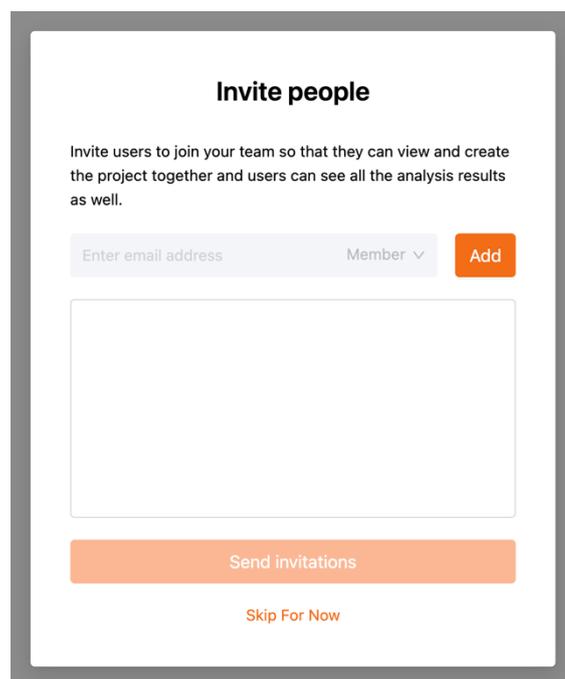


Next, the system will prompt the users to create their first Team.



You can later create additional teams in the Teams section to help organize different departments or project groups.

After that, the system will prompt you to invite users to co-manage the projects. You can either invite users during this step or click **Skip For Now** and invite them later when creating a project, or anytime via the User Management section.



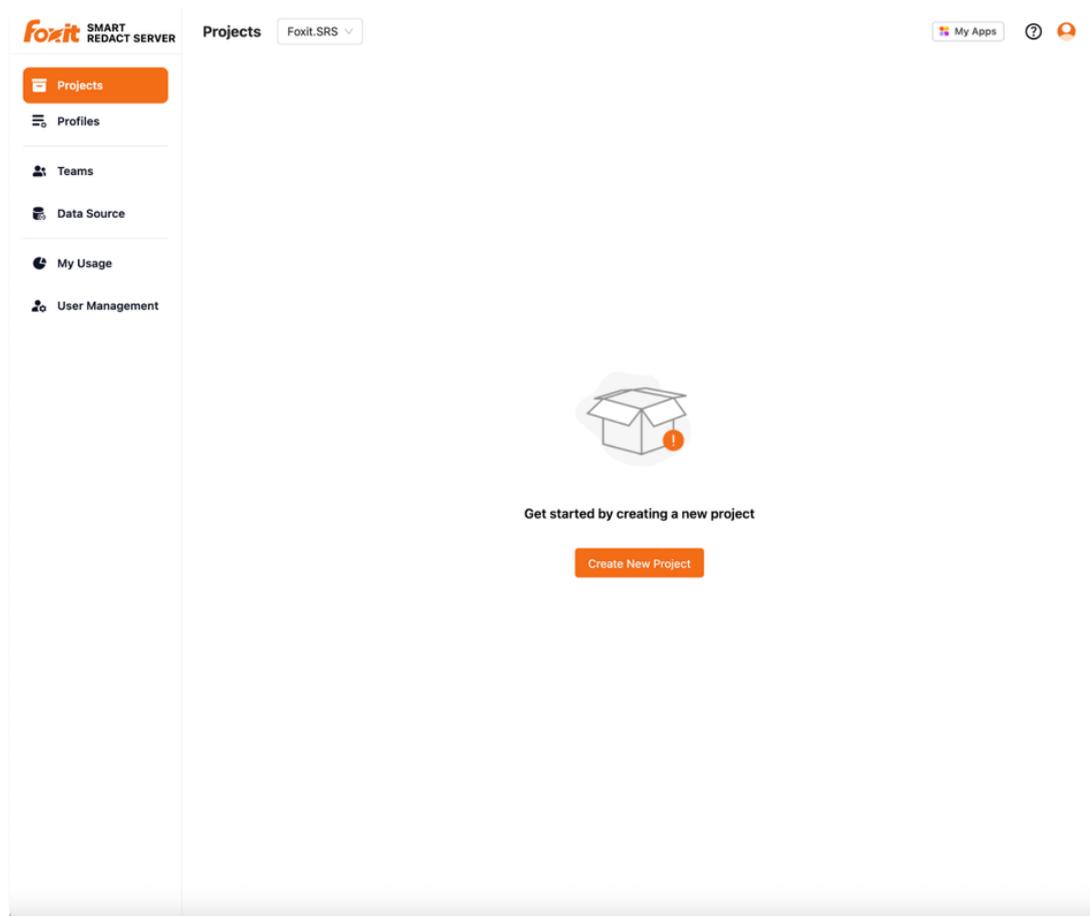
## **Create New Project**

After completing the creation of your first Team, the system will prompt you to create a project.

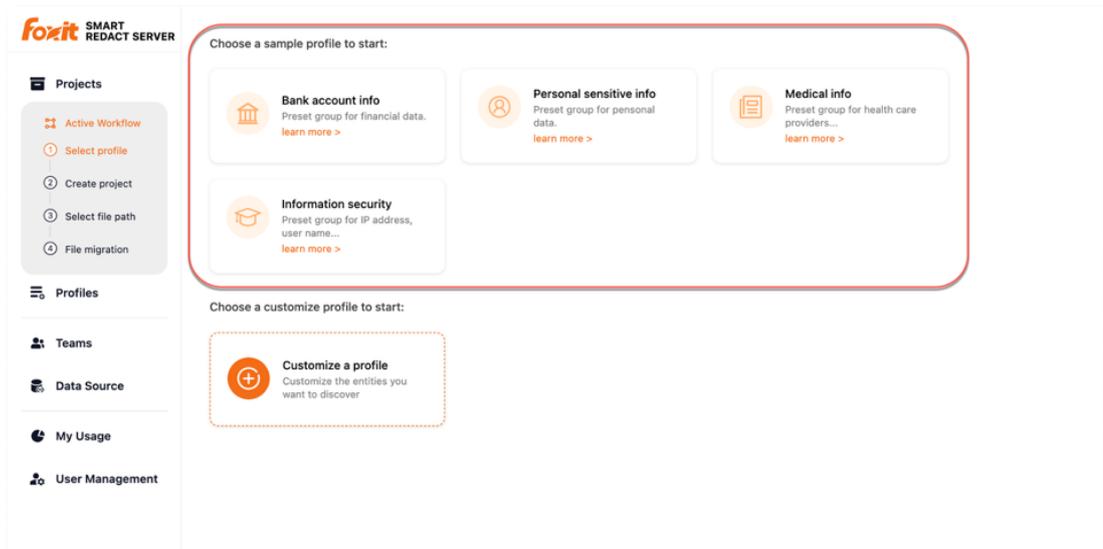
Since Smart Redact Server is a project-based management product, creating projects allows users to define different strategies for different scanning targets, offering reliable and flexible configuration capabilities.

Follow these steps to create a project:

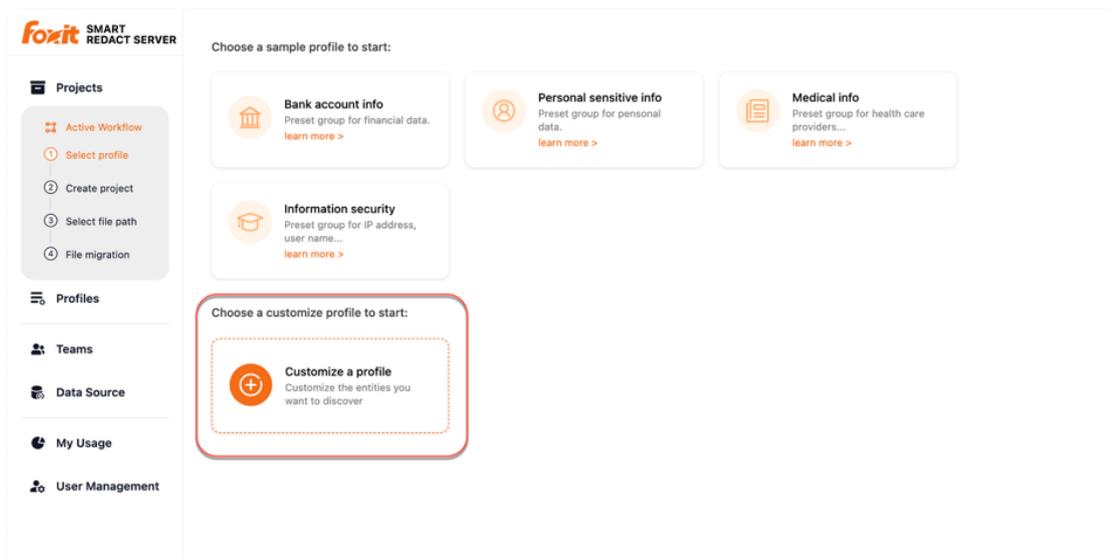
1. Click the **Create New Project** button.



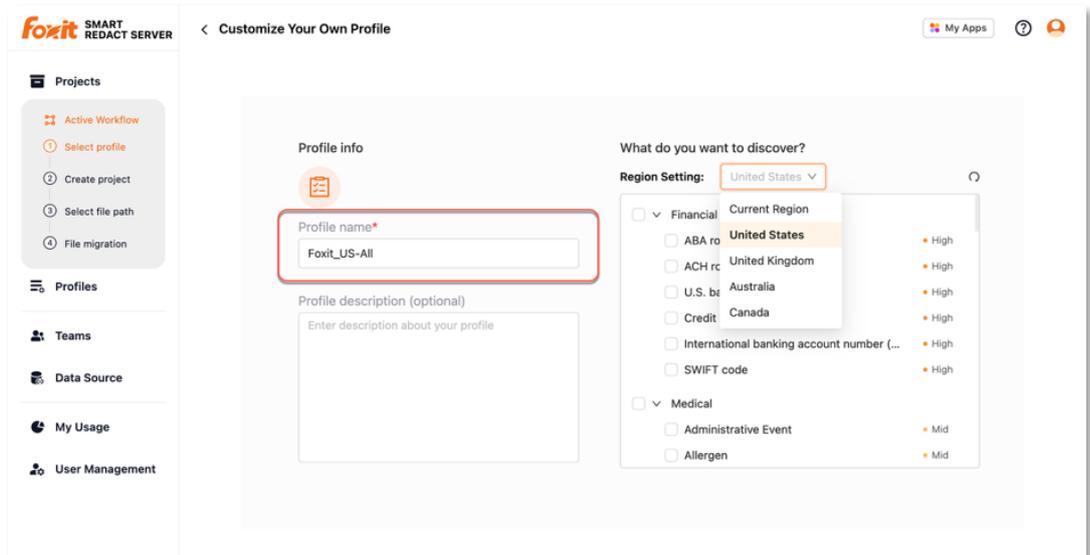
2. Select a predefined profile template from the sample profile list to use as the scanning strategy for your documents.



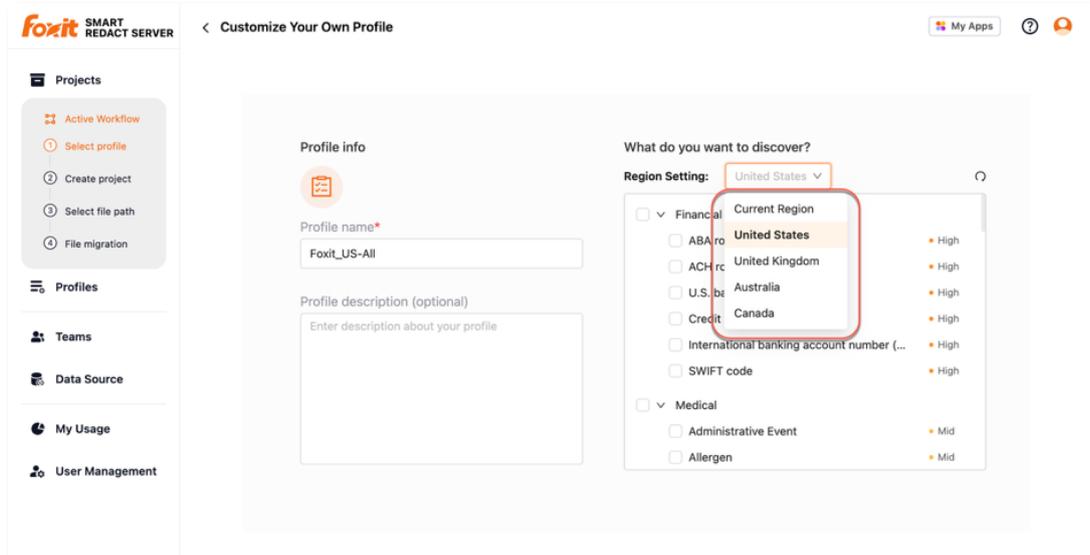
Alternatively, click **Customize a profile** to create a custom profile tailored to your specific goals for the scan. You can also create new profiles or edit existing ones later in the Profiles section.



3. On the Customize Your Own Profile screen:
  - A. In the Profile name field, enter a unique name for the profile. Make sure it does not duplicate any existing profile names.

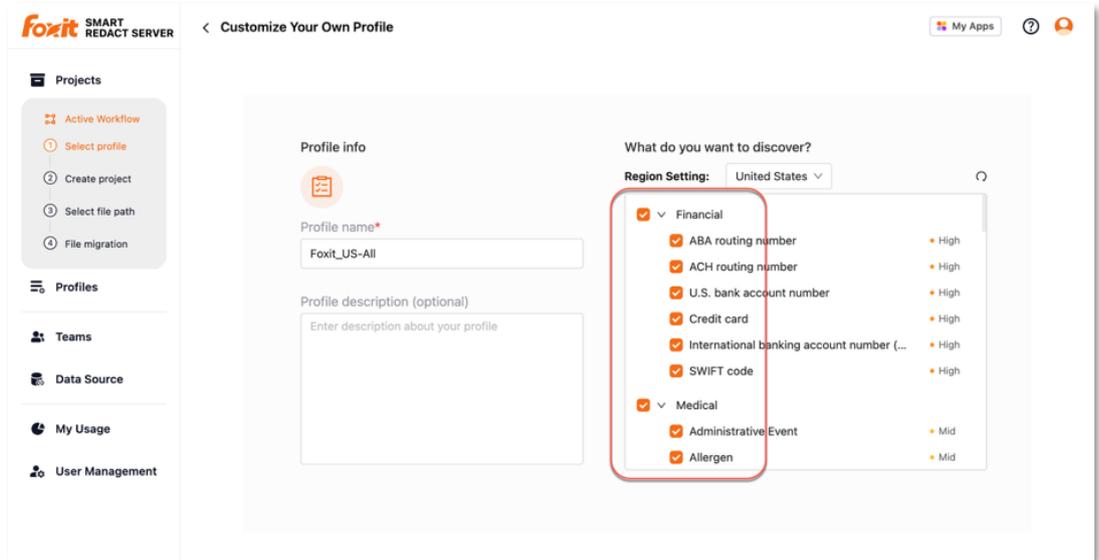


- B. In the Region Setting dropdown menu, select the region (country) that the document content to be scanned is associated with. If the desired region is not listed, please select **Current Region** as the default option.

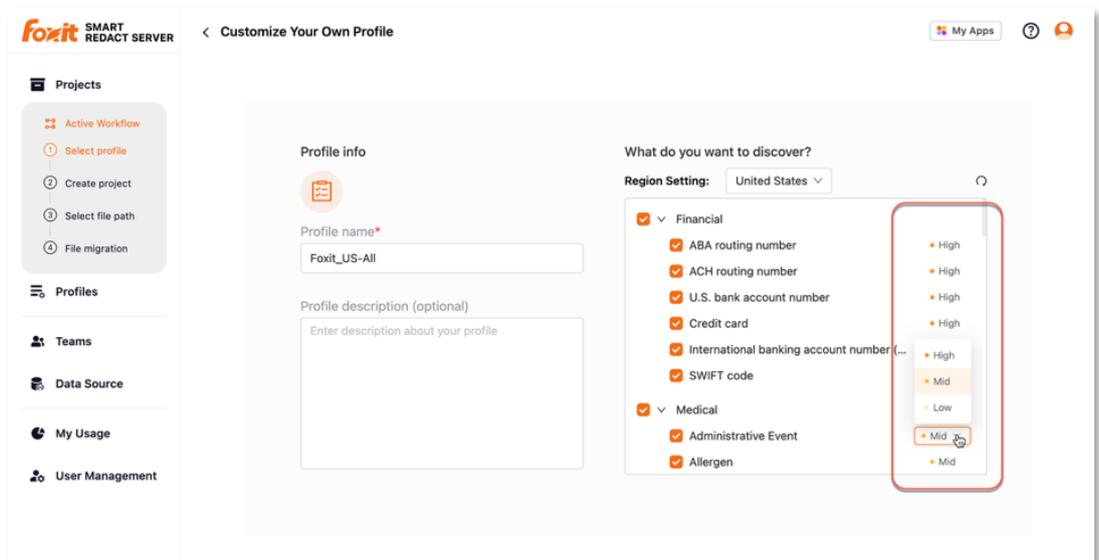


Smart Redact Server will apply scanning rules based on the selected region, ensuring compliance with local formats and legal requirements.

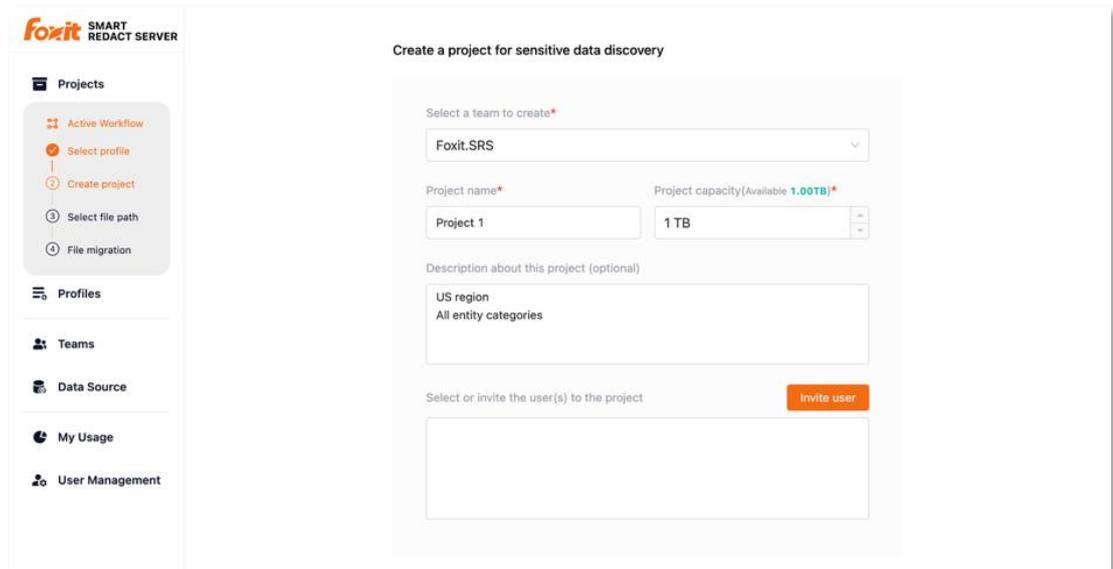
- C. Check the entity categories you want to scan for - this profile will use the selected entity categories to scan documents within the project.



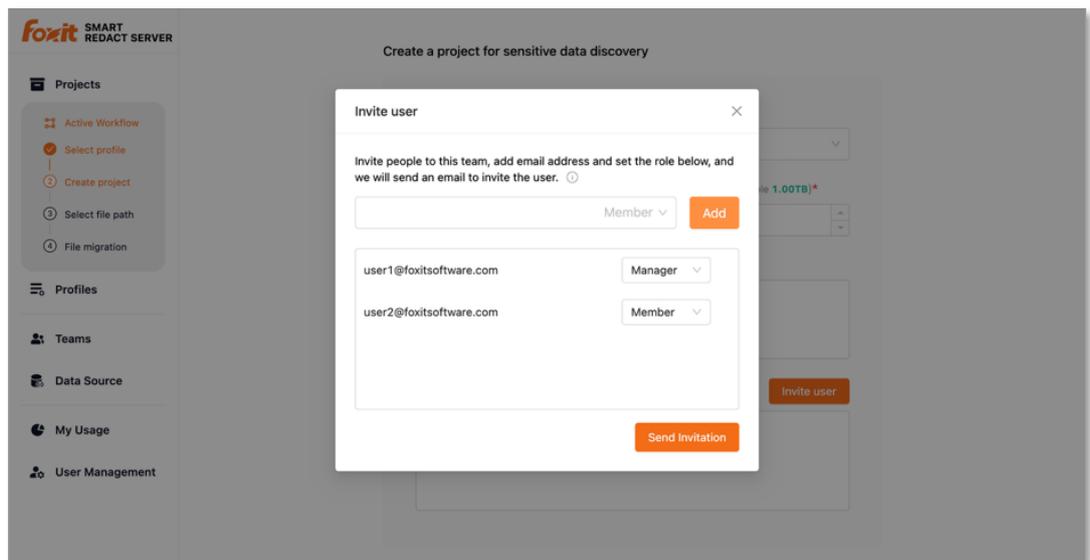
- D. The system assigns a default sensitivity level to each entity category, which serves as a reference for users to assess the sensitivity level of scanned documents (i.e., the more high-sensitivity entities a document contains, the more sensitive it is considered). Users can adjust the sensitivity levels of entity categories based on their organization's specific needs.



4. On the next screen, there are several configuration items you'll need to set:



- A. Confirm the team to which this project belongs. If you have multiple teams, you can also choose to assign this project to another team.
- B. Enter a project name in the designated field. Make sure the name is unique and not already used by another project.
- C. Select the total document volume size the project will scan.  
If the total is less than 1TB, select 1TB; if it's less than 2TB, select 2TB, and so on.  
The system will use this selection to allocate the appropriate number of licenses.
- D. You can use the Description about this project field to enter any notes or details about the project. This helps clearly define the purpose and configuration of different projects.
- E. Smart Redact Server allows multiple users to collaboratively manage a project. You can click **Invite user** to invite others to join and manage this project, or you can configure this later in the User Management section.



You can add multiple co-managing users and assign them appropriate roles. For details on permission levels, please refer to the illustration below.

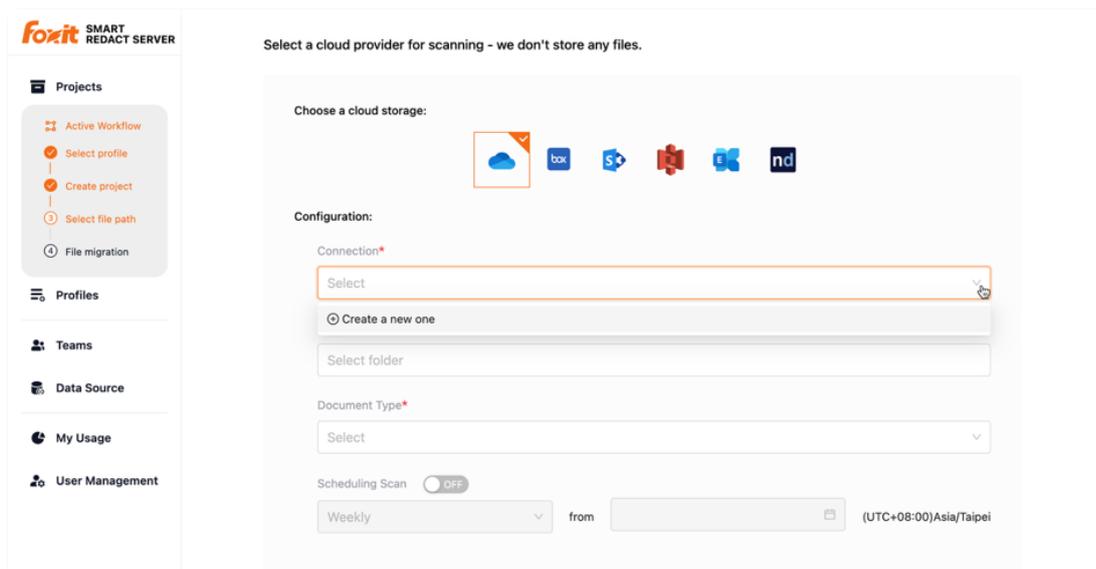
### User Roles

Permisssion	Admin	Manager	Member
View and manage details for billing	√	X	X
Create organization	√	X	X
View users in organization	√	√	√
Invite and remove users in organization	√	X	X
Change a user's role in organization	√	X	X
Rename the organization	√	X	X
Create project	√	√	X
View users in project	√	√	√
Enable/Disable members in project	√	√	X
Edit the project <ul style="list-style-type: none"> <li>• Rename</li> <li>• Modify descriptions of project</li> <li>• Change connected data source</li> </ul>	√	√	X
Config storage connection	√	X	X
View results	√	√	√

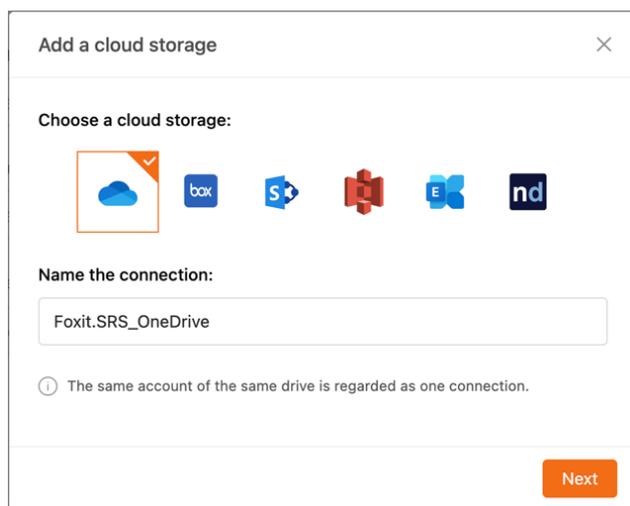
- On the next page, users need to select the document source (data source) to be scanned.

Smart Redact Server supports retrieving documents from various cloud storages or collaboration platforms for sensitive data scanning. During this process, users will be prompted to grant the necessary access permissions to allow Smart Redact Server to retrieve the files successfully.

- A. First, select the cloud storage or collaboration platform you wish to connect to. If this data source is being connected for the first time, click **Create a new one** to establish a new connection.



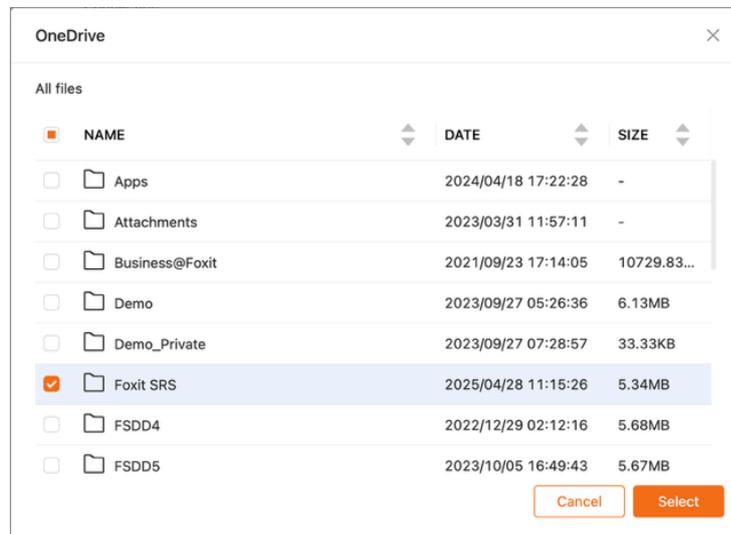
- B. Using Microsoft OneDrive as an example, enter a name for the connection, then click the **Next** button to proceed.



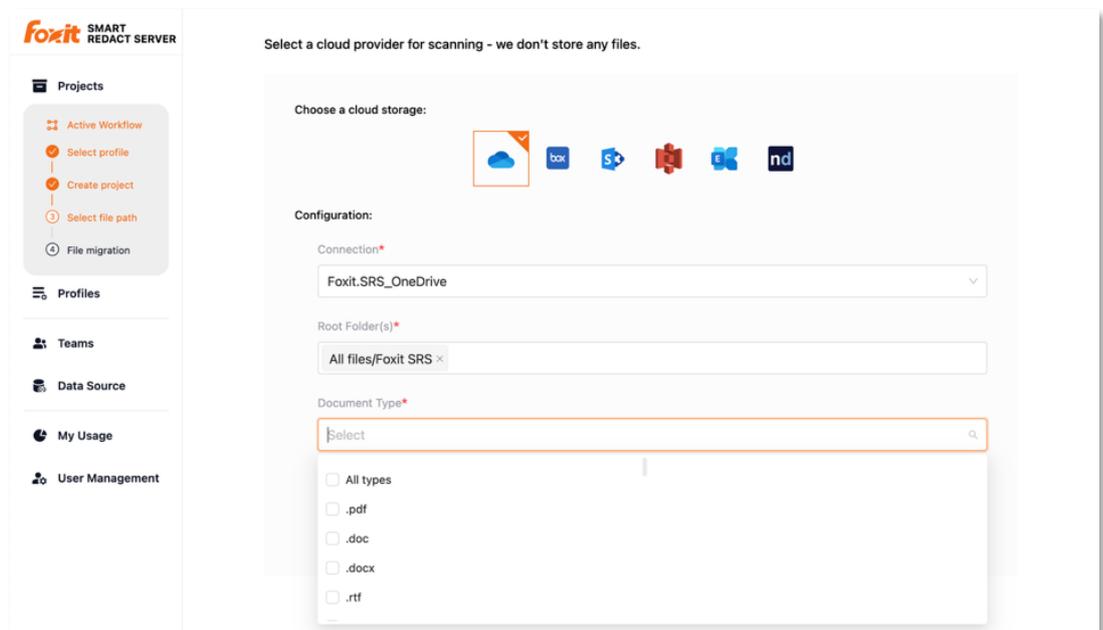
After entering the correct login credentials and granting the necessary permissions, the connection will be successfully established.

- C. Click the **Root Folder(s)** field, and in the pop-up window, select one or more files or folders you want to scan. Alternatively, you can click into a folder to

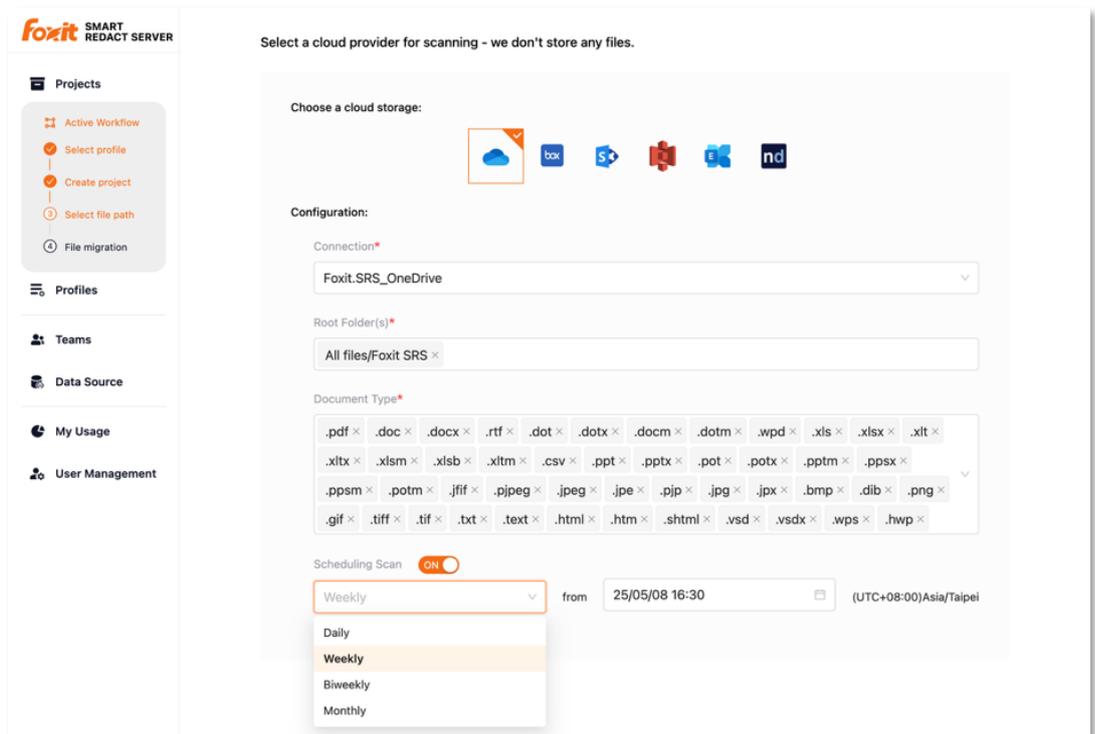
browse its contents and then select specific files or subfolders within it. Once you're done, click the **Select** button to continue.



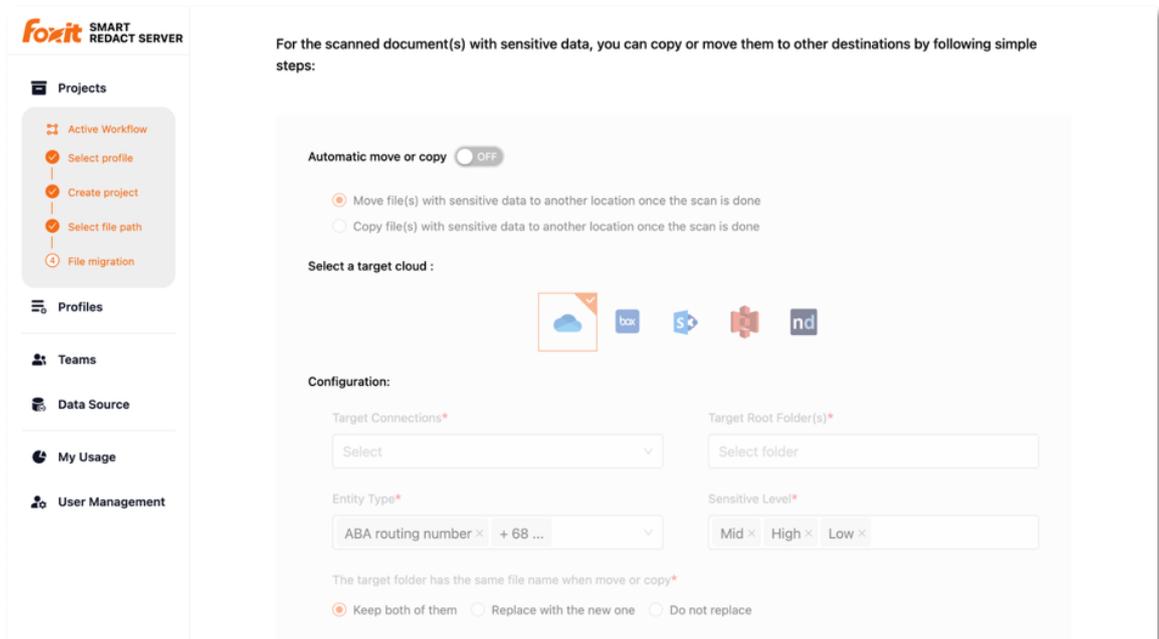
- D. In the Document Type dropdown menu, select the type of documents you want to scan, or click **All types** to scan all supported document types. Smart Redact Server supports a total of 47 file types, including PDF and Microsoft Office documents.



- E. You can configure the scanning interval for this project:  
By default, the system will perform a one-time scan immediately after the project is created. Alternatively, you can enable Scheduling Scan option, where you can set the scan frequency, start date and start time, the system will then scan based on your configured schedule.



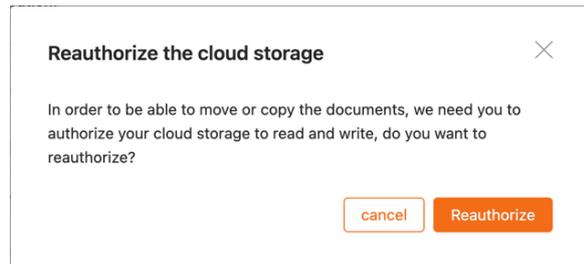
6. In the final File Migration configuration stage, you can choose to have documents containing sensitive data automatically copied or moved to a designated folder after scanning. Alternatively, you can opt to manually handle the files after the scan is complete.



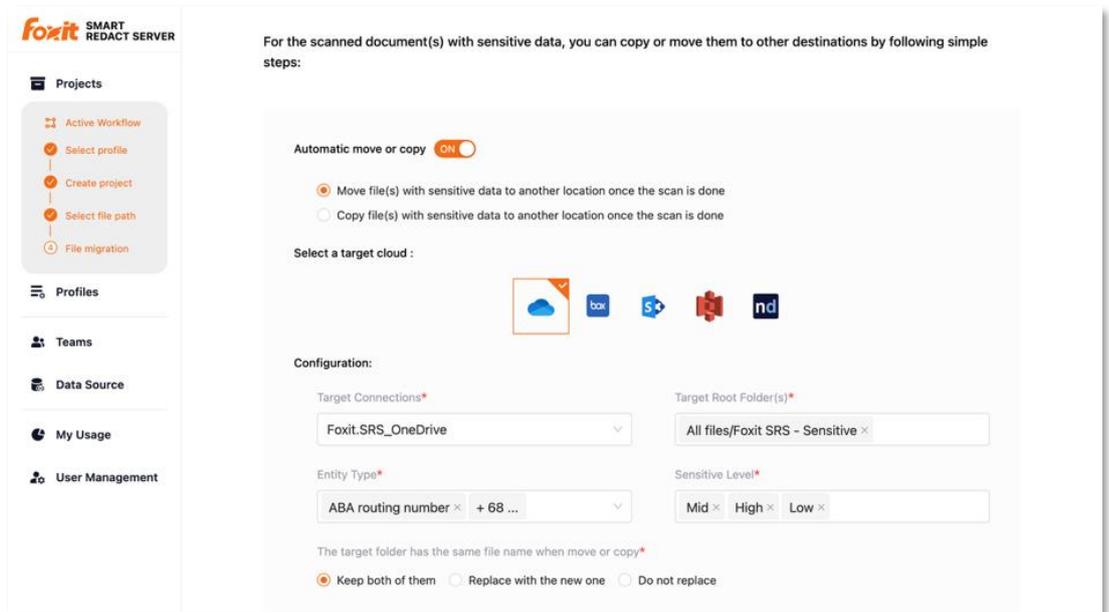
- A. When enabling the Automatic move or copy function, the system will display a prompt requesting that you grant read and write permissions to Smart Redact Server.

When creating a data source connection, Smart Redact Server only requests read access by default. However, if you want the system to automatically copy or move files containing sensitive data to a specified location, write access is also required.

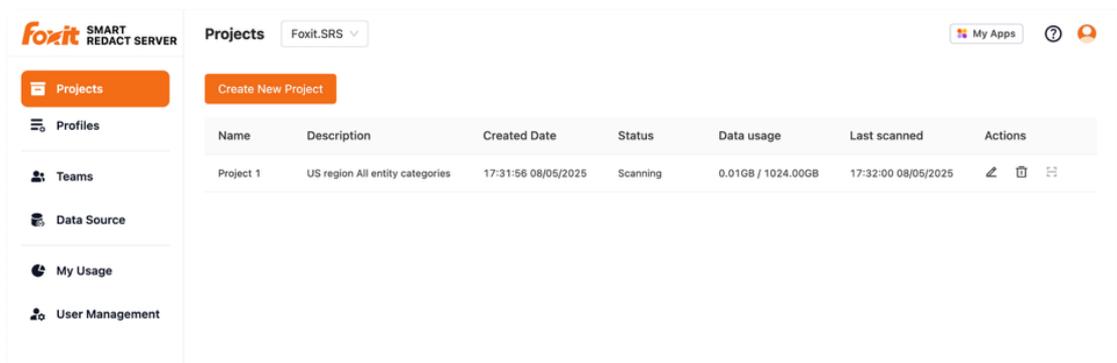
Click the Reauthorize button, provide the correct login credentials, and grant the requested permissions to complete the authorization.



- B. Please follow the steps below to complete this configuration:
- i. Choose whether to move or copy the files. The default option is Move.
  - ii. Select the target (destination) location for the sensitive files to be moved or copied. Choose the appropriate cloud drive, (choose or create) the corresponding connection, and then the target folder where the files should be placed.
  - iii. Select which documents should be moved or copied based on the following criteria:
    1. Documents containing specific entity categories.
    2. Documents containing sensitive data of a certain sensitivity level.
  - iv. Choose how to handle file name conflicts when moving or copying files. The default option is Keep both of them.



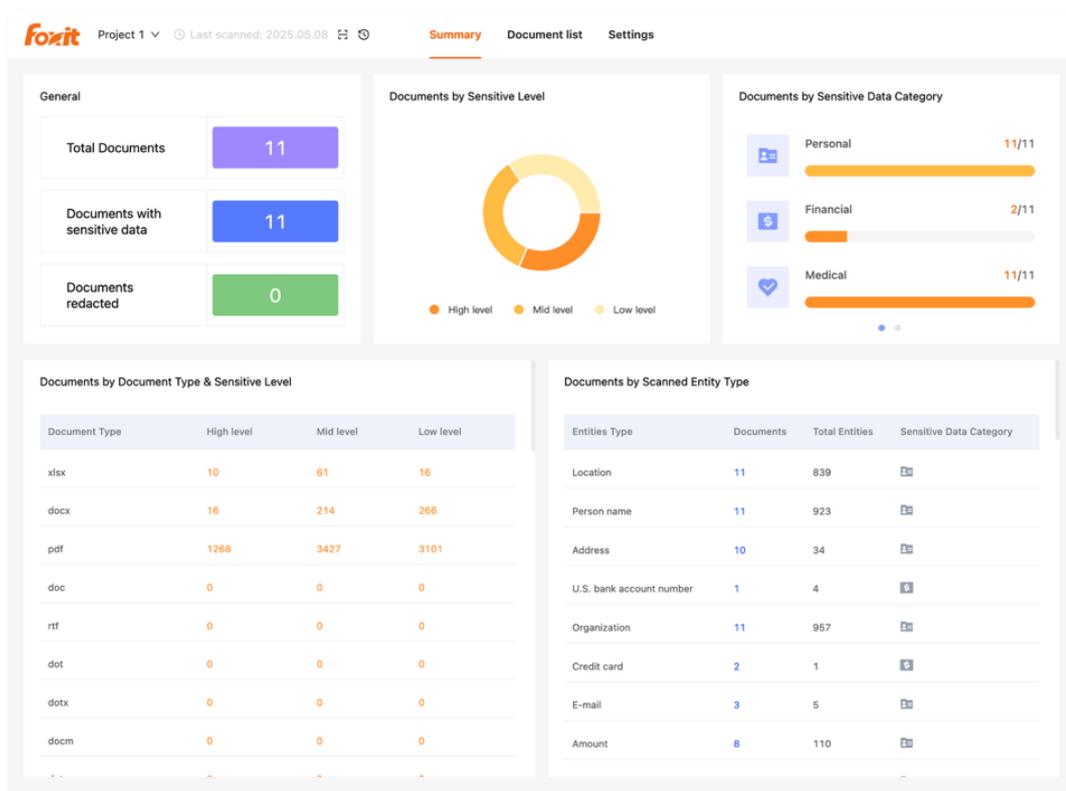
7. Click **Start To Scan** button to complete the project creation and begin the scanning process.



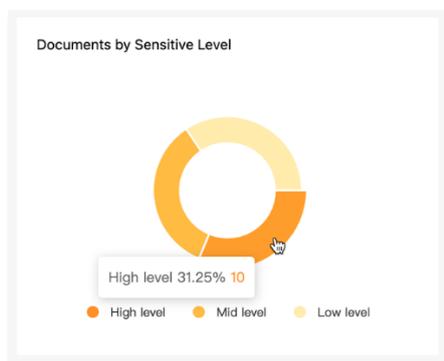
## Projects

Once the project has completed scanning (with the Status field showing Scanned), click the project name to enter the project and view the scan results.

1. On the Summary page, users can view a variety of scan results, including:



- General – displays the total number of scanned documents, the number of documents containing sensitive data, and the number of documents that have been redacted.
- Documents by Sensitive Level – shows the count and percentage of documents containing entities of various sensitivity levels. Hovering the cursor over the chart reveals the exact number of documents and percentages for each level.



- Documents by Sensitive Data Category – displays the number of documents containing different categories of sensitive data.
- Documents by Document Type & Sensitive Level – shows the total count of sensitive entities categorized by document type and sensitivity level. Clicking a number navigates you to the Document list, filtered by the selected

document type and sensitivity level.

- Documents by Scanned Entity Type – displays the total count of detected sensitive entity categories, along with the number of documents containing each category. Clicking on the document count will take you to the Document list, filtered to show documents containing that specific entity category.
2. On the Document list page, the system displays all documents within the project that have been scanned and contain sensitive data, along with detailed attributes such as:
- Document name and file extension
  - Original storage location
  - Detected sensitive data categories
  - Document type
  - File size
  - Sensitivity level of detected entities
  - Whether the document has been moved, copied, or redacted
  - The destination location it was moved or copied to

**Foxit** Project 1 ▾ Last scanned: 2025.05.08 ⚙️ 🔍 Summary **Document list** Settings

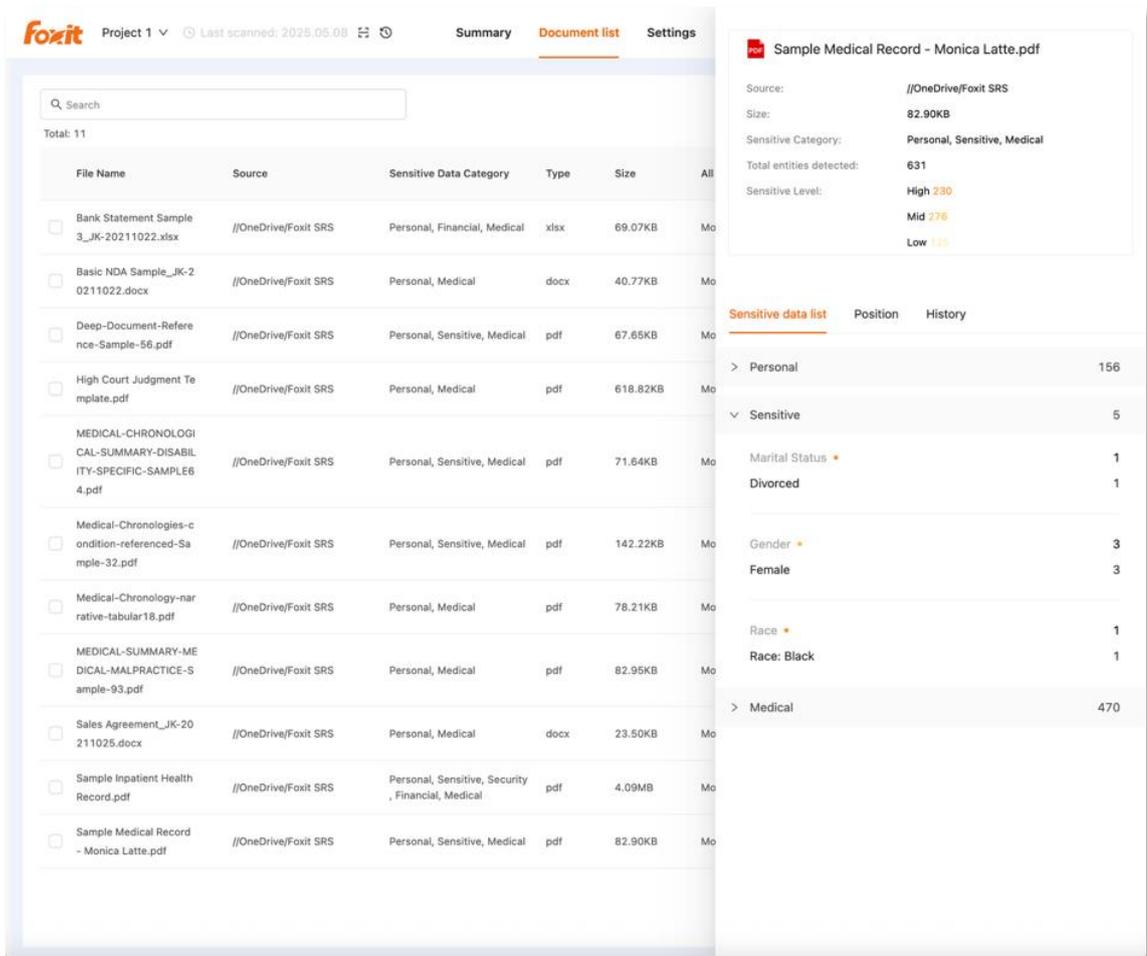
🔍 Search Redact Move To Copy To ⓘ

Total: 11

File Name	Source	Sensitive Data Category	Type	Size	All Status ▾	Entities By Sensitive High/Mid/Low	Move/Copy to
<input type="checkbox"/> Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Moved 📁 📄	10/61/16	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Basic NDA Sample_JK-20211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 📁 📄	4/174/176	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Deep-Documents-Reference-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 📁 📄	117/173/173	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> High Court Judgment Template.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved 📁 📄	0/788/1337	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> MEDICAL-CHRONOLOGICAL-SUMMARY-DISABILITY-SPECIFIC-SAMPLE64.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Moved 📁 📄	87/61/126	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Medical-Chronologies-condition-referenced-Sample-32.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 📁 📄	347/626/283	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Medical-Chronology-narrative-tabular18.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	78.21KB	Moved 📁 📄	277/465/197	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> MEDICAL-SUMMARY-MEDICAL-MALPRACTICE-SAMPLE-93.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	82.95KB	Moved 📁 📄	99/73/152	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Sales Agreement_JK-20211025.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	23.50KB	Moved 📁 📄	12/40/90	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Sample Inpatient Health Record.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Security, Financial, Medical	pdf	4.09MB	Moved 📁 📄	111/965/708	//OneDrive/Foxit SRS - Sensitive
<input type="checkbox"/> Sample Medical Record - Monica Latte.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	82.90KB	Moved 📁 📄	230/276/125	//OneDrive/Foxit SRS - Sensitive

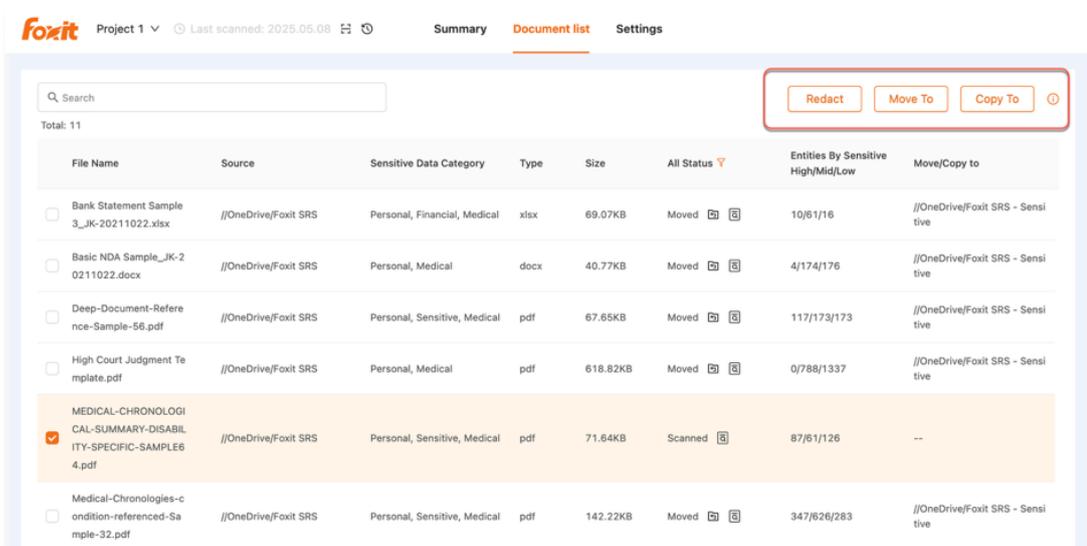
When there are a large number of documents and it's difficult to locate a specific one, users can search using one or more filters, such as file name, category, or sensitivity level; or use filter options triggered by clicking on charts or numbers in the Summary page to directly narrow down to the relevant documents.

3. Clicking on any file in the list will display detailed scan results for that file on the right-hand panel.
  - In the Sensitive data list, the system shows detected sensitive entity content, grouped by entity category.
  - In the Position section, it displays the location of each sensitive entity within the document, including pagination, coordinates and contextual positioning.
  - In the History section, it logs a timeline of actions performed on the file, including who performed each action and when.

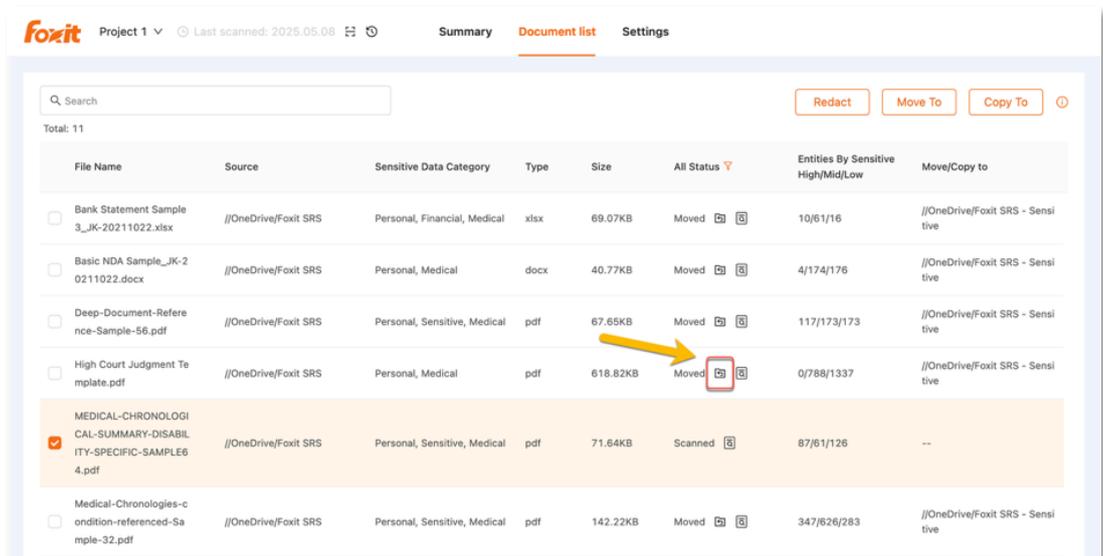




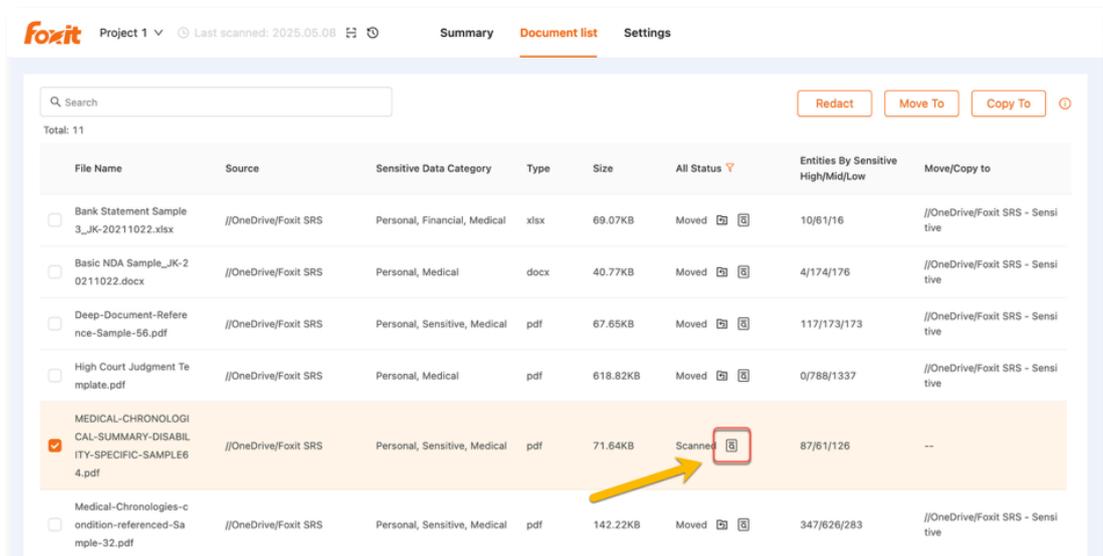
4. By selecting one or more files, you can use the buttons in the upper-right corner to Copy, Move, or Redact the selected documents.



- If a file has already been moved, only the Redact action will be available after selection.
- Clicking the icon highlighted in red allows you to move the already moved file back to its original location.

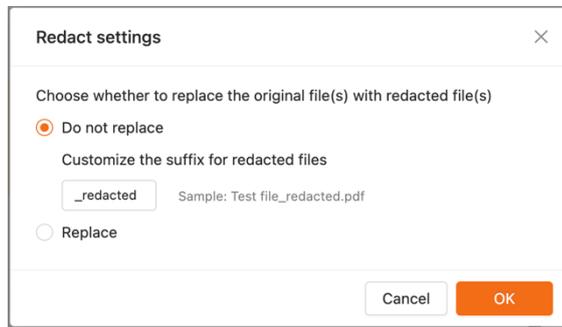


- Clicking the other red-framed icon opens a document viewer where you can browse the file's content and preview the redaction results.



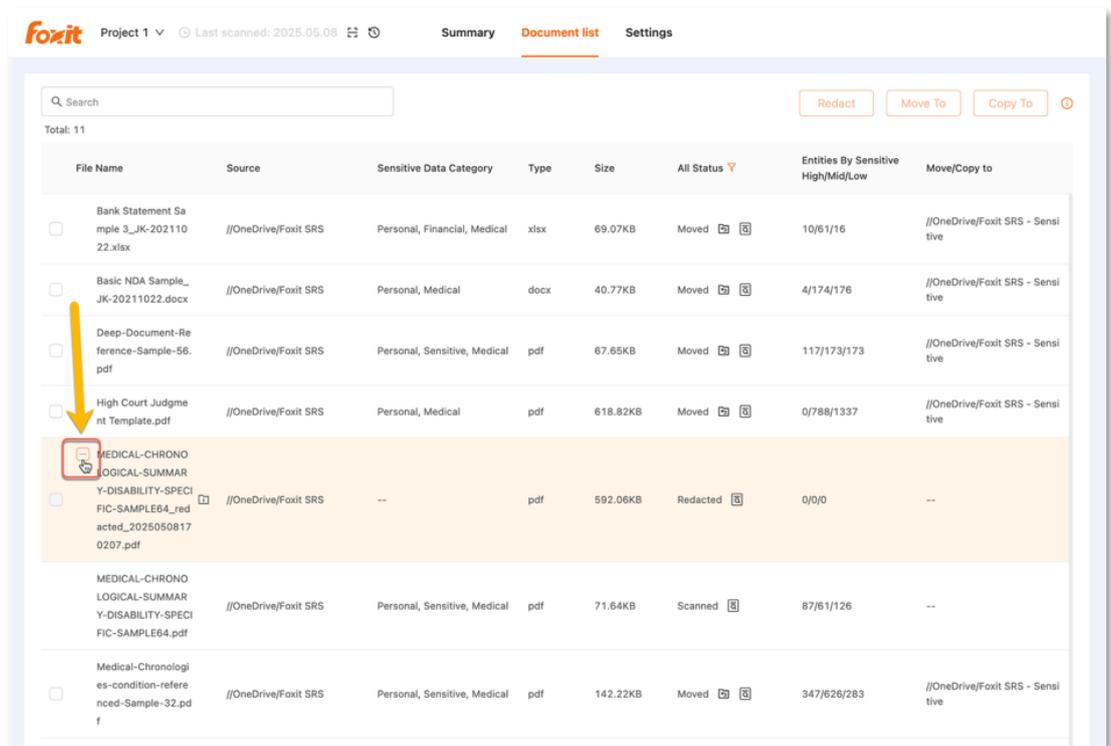
5. When you click the Redact button, the system will perform redaction on the selected files. It will automatically redact all detected sensitive entities and generate a new redacted version of the file. Users can choose to save the redacted file in the same location as the original, with a customizable filename suffix (the default suffix is `_redacted`) to differentiate it.

Alternatively, users can choose to replace the original file with the redacted version (by default, this option is disabled, meaning the original file will be preserved).

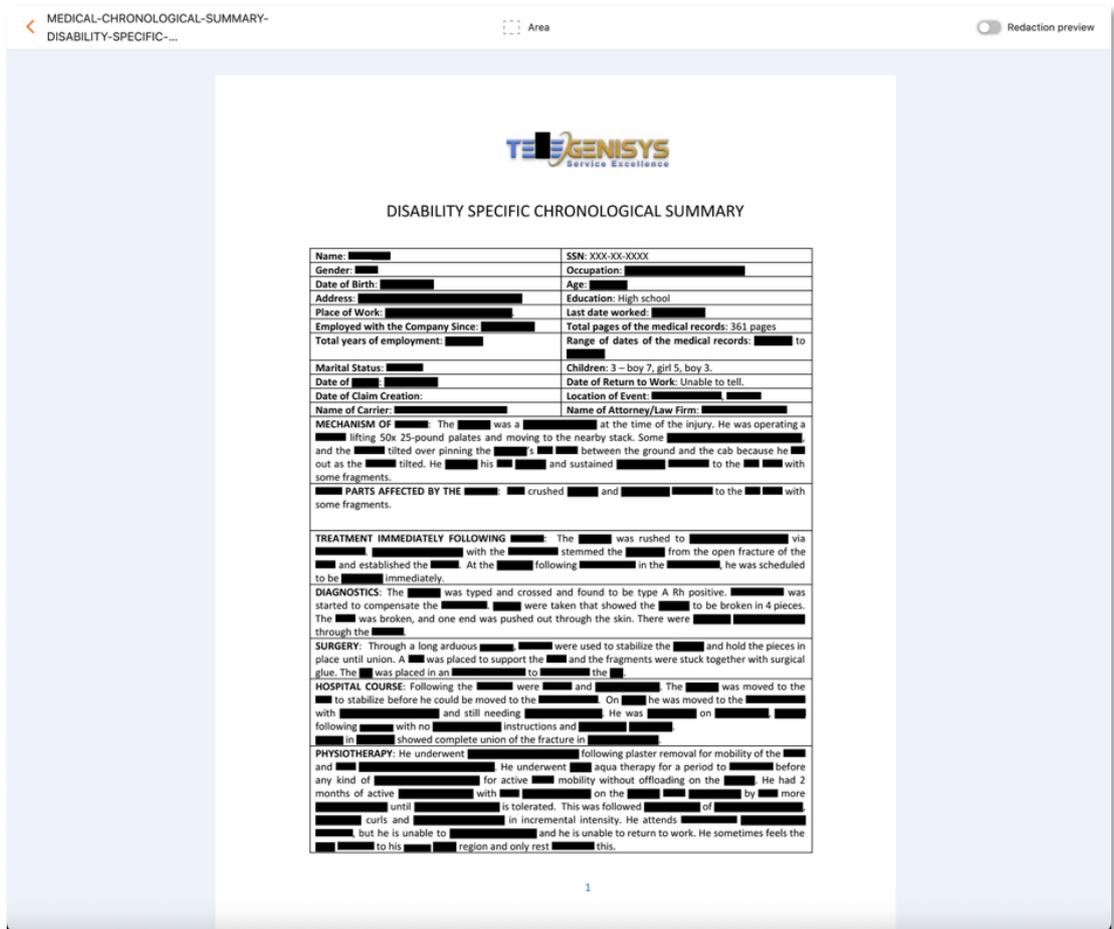


After redaction is completed, the file name in the list will be updated to reflect the redacted version.

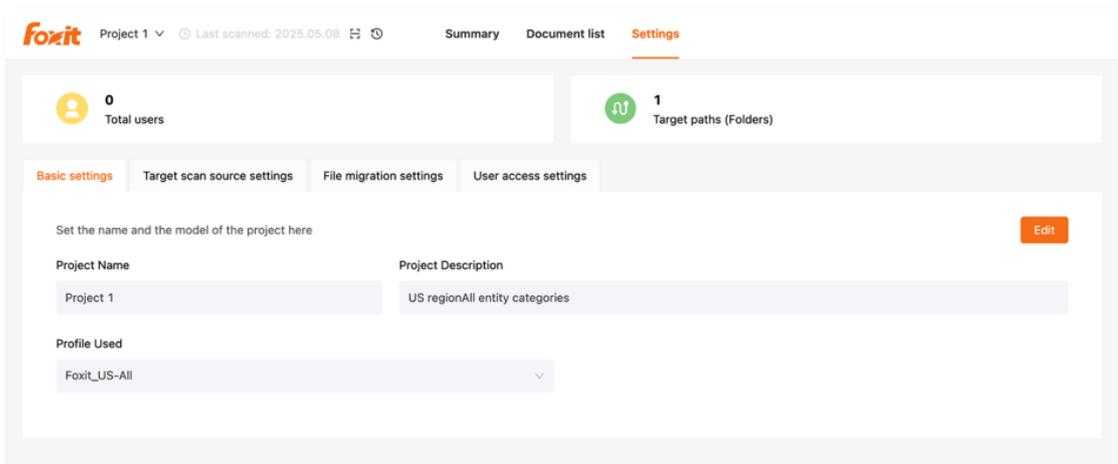
- Clicking the **plus (+)** icon will expand the entry to show the original document.



- Clicking the **View** icon allows you to view the contents of the redacted file.

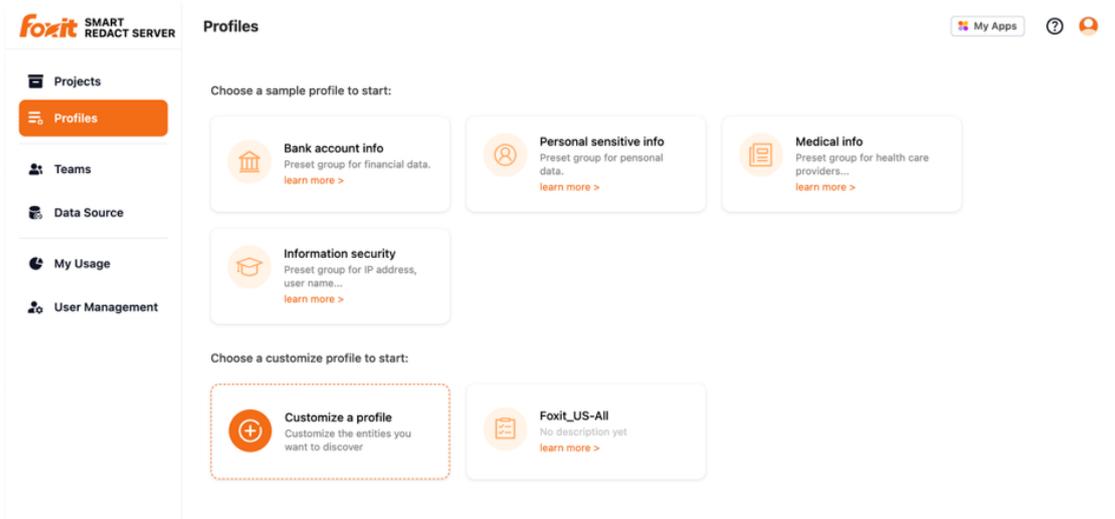


- On the Settings page, users can click the Edit button to adjust various configuration settings for the project.



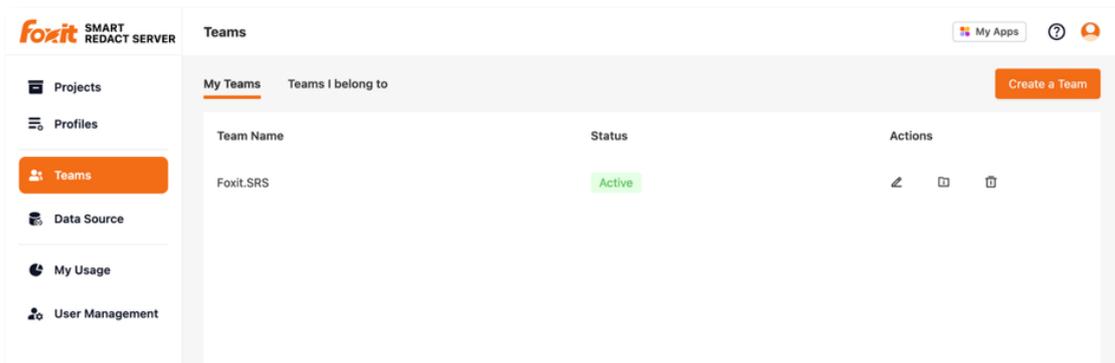
## Profiles

In this section, users can create new profiles or edit existing ones. It can be also adjusting the sensitivity level assigned to each entity category as needed.



## Teams

In the My Teams page of this section, users can create and manage multiple teams they own, or modify existing ones. Alternatively, under the Teams | belong to page, users can view the teams they've been added to, along with the owners of those teams.



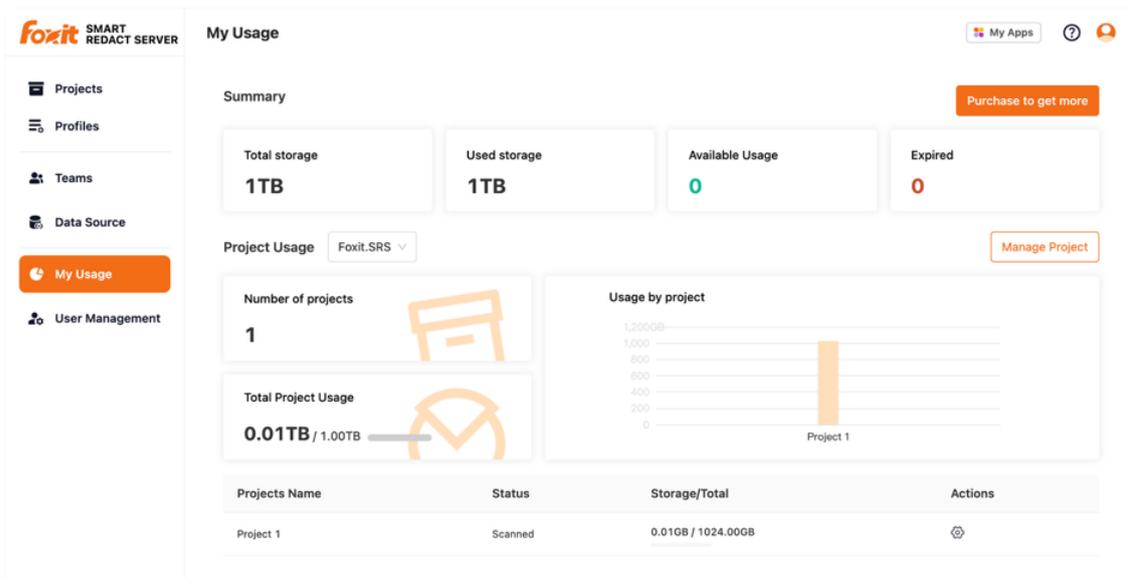
## Data Source

In this section, users can create additional connections to link with cloud drives or collaboration platforms, or edit existing connections they have already set up.



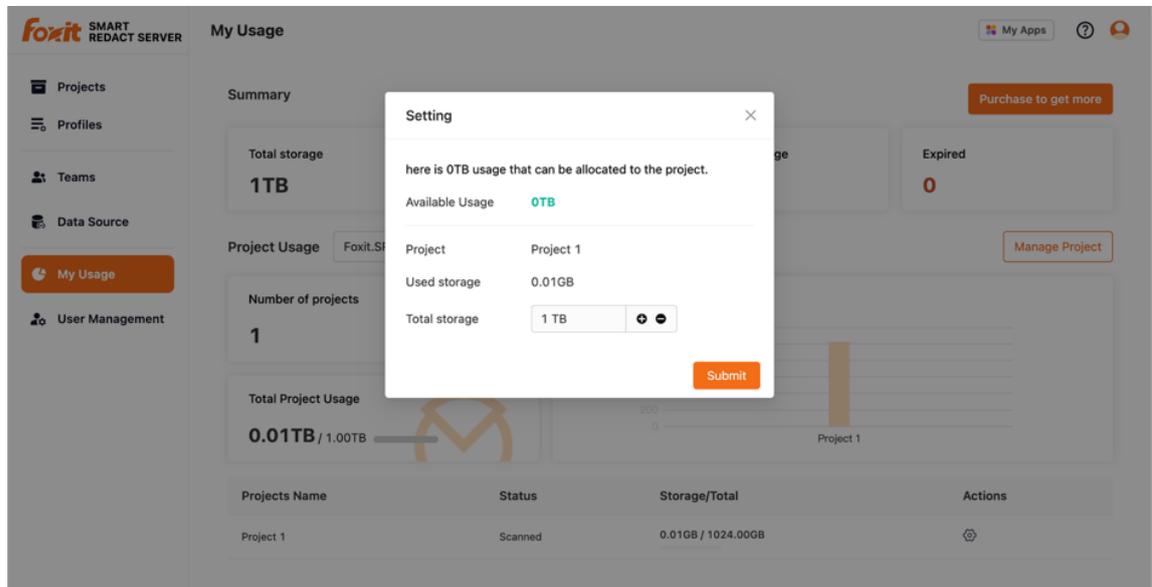
## My Usage

In this section, users can view the total number of purchased licenses, their allocation status, and the number of remaining or expired licenses. Use the Project Usage dropdown menu to switch between teams and check the usage status of each project.



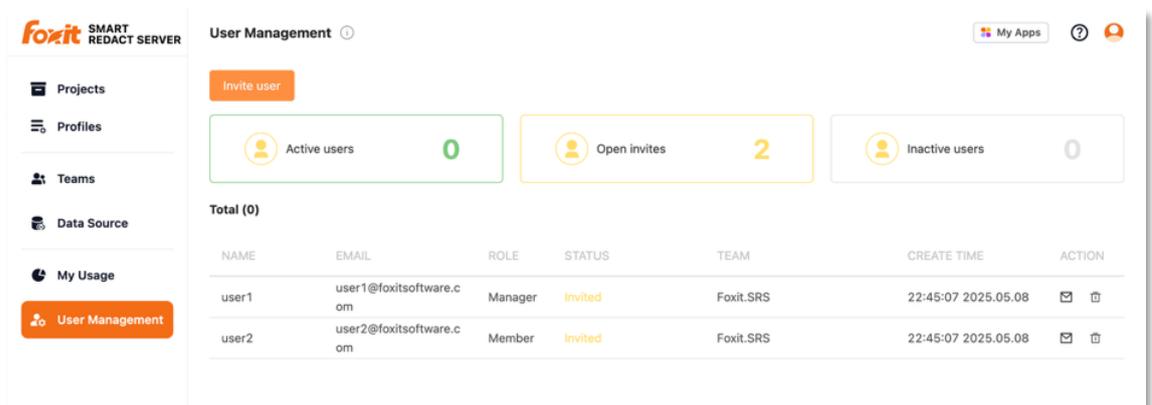
Click **Manage Project** button to be navigated to the Projects section, where you can create new projects or edit existing ones. Alternatively, you can adjust license

allocation directly by clicking the **Gear icon** under the Actions column for each project on this page.

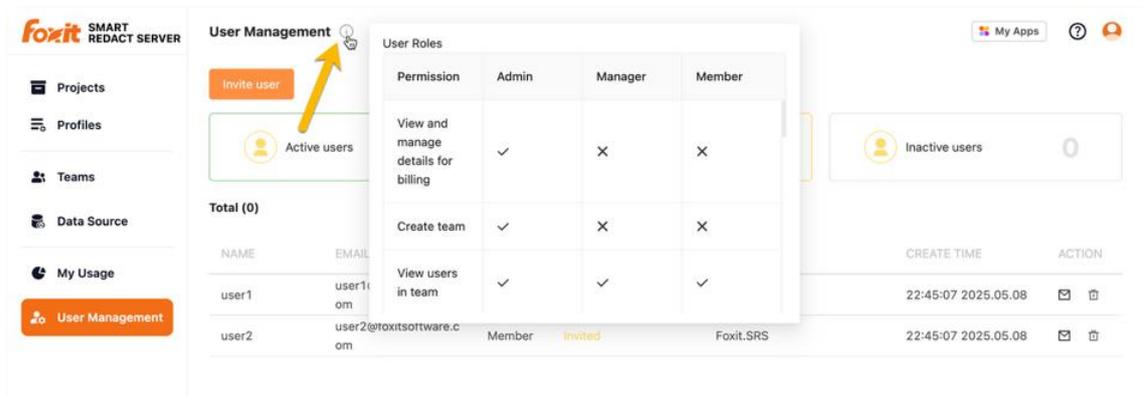


## User Management

In this section, users can view or modify existing invited collaborators, or invite new users to help manage the projects.



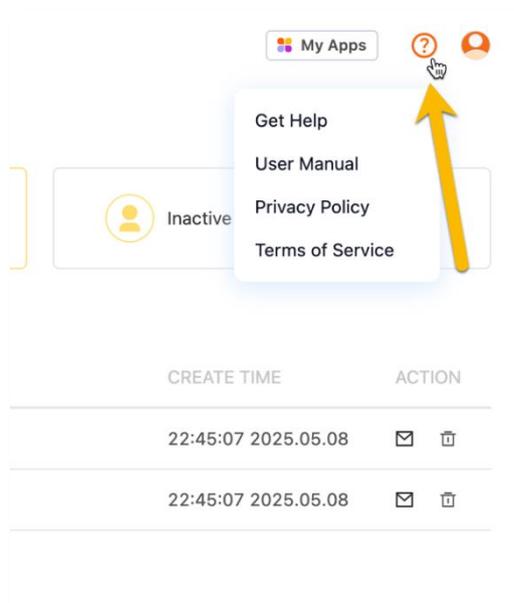
Hover the cursor over the exclamation mark icon next to User Management, and a detailed list of User Roles will pop up. Users can scroll through the list to view all the role-related details.



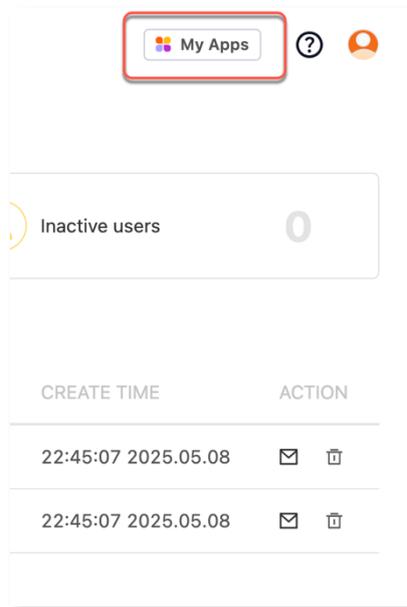
## Miscellaneous

On any page, hovering the cursor to the question mark icon in the top-right corner will open the help menu with the following options:

- Get Help - to access the Foxit Support Center and create support tickets.
- User Manual - to access the Smart Redact Server User Manual.
- Privacy Policy and Terms of Service - to view the corresponding informational pages.

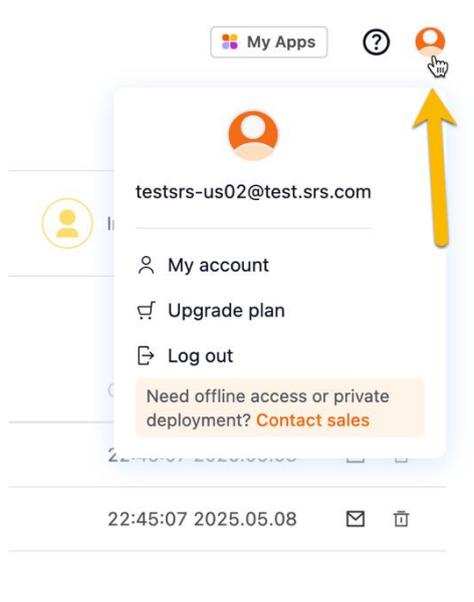


On any page, clicking My Apps button in the top-right corner will navigate you to the all my apps page, where you can select and access other available Web Apps.



On any page, hovering the cursor to the profile icon in the top-right corner will open the menu with the following options:

- My account – navigates you to your Foxit account page.
- Upgrade plan – takes you to the subscription page where you can view or upgrade your current plan.
- Log out – logs you out of the Smart Redact Server service.



## Contact Us

Feel free to contact us should you need any information or have any problems with our products. We are always here, ready to serve you better.

- *Office Address:*  
Foxit Software Incorporated  
39355 California Street  
Suite 302  
Fremont, CA 94538  
USA
- *Sales:*  
1-866-680-3668
- *Support & General:*  
[Support Center](#)  
1-866-MYFOXIT, 1-866-693-6948
- *Website:*  
[www.foxit.com](http://www.foxit.com)