forit USER MANUAL

Foxit Smart Redact Server

© Foxit Software Incorporated. All rights reserved.

© Foxit Software Incorporated. All Rights Reserved.

No part of this document can be reproduced, transferred, distributed or stored in any format without the prior written permission of Foxit.

Permission to copy, use, modify, sell and distribute this software is granted provided this copyright notice appears in all copies. This software is provided "as is" without express or implied warranty, and with no claim as to its suitability for any purpose.

Contents

Contents	3
Introduction	4
Key Features	4
Getting Started	5
Login	5
Create a Team	6
Create New Project	7
Projects	
Profiles	26
Teams	26
Data Source	27
My Usage	27
User Management	
Miscellaneous	29
Contact Us	31

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.

Email	° () () () () () () () () () () () () ()
Password	\bigotimes
۵	2
Remember Me Forgot Password?	· ·
Sign In	
🔑 SSO Login	PDF
OR	
	Welcome
Don't have an account ? Create One	0

Create a Team

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

	welcome to Foxit Smart Redact Server
Befo follo	ore you begin using Foxit Smart Redact Server, please take a moment to review the wing agreements and policies:
Priv	racy Policy
Our usin	Privacy Policy outlines how we collect, use, and protect your personal information. By g Foxit Smart Redact Server, you agree to the terms of our <u>Privacy Policy</u> .
Teri	ms of Service
Our info usin	Terms of Service govern your use of Al Assistant. These terms cover important rmation about your rights, obligations, and limitations of our liability. By accessing or ig Al Assistant, you agree to comply with our <u>Terms of Service</u> .
Ŷ	By clicking "Accept" or continuing to use Foxit Smart Redact Server, you confirm that you have read and understood these agreements and policies and that you agree to comply with them.
	Accept

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

Welcome	to Foxit
Let's get started by s	etting up your team.
Teams are where you and other on sensitive data.	members can work together
Foxit.SRS	9 / 54
Create	toom

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.

Invite p	people	
Invite users to join your team so the project together and users c as well.	that they can view a an see all the analysi	nd create s results
	Member \vee	Add
Send inv	itations	
Skip Fo	r Now	
		_

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.

FORT SMART REDACT SERVER	Choose a sample profile to start:
Projects Active Workflow Select profile	Bank account info Presset group for financial data. learn more > Personal sensitive info Presset group for financial data. learn more > Personal sensitive info Presset group for pensonal data. learn more > Medical info Presset group for health care providers learn more >
 Create project Select file path File migration 	Information security Preset group for IP address, user name learn more >
≡ ₀ Profiles	Choose a customize profile to start:
よ Teams	Customize a profile Customize the entities you want to discover
My Usage	
🎝 User Management	

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.

FOXIT SMART REDACT SERVER	Choose a sample profile to start:
Projects Active Workflow Select profile	Bank account info Preset group for financial data. learn more > Personal sensitive info Preset group for pensonal data. learn more > Personal sensitive info Preset group for health care providers learn more >
 Create project Select file path File migration 	Information security Preset group for IP address, user name learn more >
Ξ ₀ Profiles	Choose a customize profile to start:
🐮 Teams	Customize a profile Customize the entities you want to discover
C My Usage	
🍰 User Management	

- 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.

For SMART REDACT SERVER	< Customize Your Own Profile	🚼 My Apps	0	0
 Active Workflow Select profile Create project 	Profile info What do you want to discover? Region Setting: United States V	0		
 3 Select file path 4 File migration 	Profile name* Current Region Foxit_US-All ABA ro United States ACH rc United Kingdom AcH rc	• High • High		
Teams	Profile description (optional) Enter description about your profile International banking account number (SWIFT code	• High • High • High • High		
 Data Source My Usage 	 ✓ Medical Administrative Event Allergen 	• Mid • Mid		
20 User Management				

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.

Projects Projects Active Workflow Select profile Create project Select file path Select file path File migration File migration File migration File migration	Customize Your Own Profile Profile info Image: Profile name* Foxit_US-All Profile description (optional) Enter description about your profile	What do you want to discover? Region Setting: United States V V Financal Current Region ABA ro United States ACH rc United Kingdom U.S. ba Australia Credit Canada International banking account number (My Apps My Apps Main Apps High High High High High High
Image: Second	Enter description about your profile	International banking account number (SWIFT code V Medical Administrative Event Allergen	 High High Mid Mid

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.

For SMART REDACT SERVER	< Customize Your Own Profile	👬 My Apps 🕜 🚨
Projects		
 Active Workflow Select profile Create project Select file path File migration File model 	Profile info What do you want to discover? Region Setting: United States Profile name* Image: Comparison of the state of the s	C + High + High + High + High
Image: Teams Image: Data Source Image: My Usage Image: User Management	 International banking account numb SWIFT code SWIFT code V Medical Administrative Event Allergen 	ser (+ High + High + Mid + Mid

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.

For SMART REDACT SERVER	< Customize Your Own Profile	😫 My Apps	?	0
Projects				
Active Workflow				
Select profile	Profile info What do you want to discover?			
② Create project	Region Setting: United States V	0		
3 Select file path	♥ ✓ Financial			
④ File migration	Fronte name*	• High		
= Drefiles	ACH routing number	• High		
=o Promes	Profile description (optional)	High		
🚉 Teams	Enter description about your profile	• High		
•	SWIFT code	• High		
Data Source	🔽 🗴 Madical	• Low		
🔮 My Usage	Administrative Event	• Mid 25		
	🕑 Allergen	• Mid		
User Management				

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

FOR REDACT SERVER	Create a project for sensitive d	ata discovery	
Projects	Select a team to create*		
Active Workflow Select profile	Foxit.SRS		~]
Create project	Project name*	Project capacity(Availa	ible 1.00TB)*
③ Select file path	Project 1	1 TB	*
(4) File migration	Description about this projec	t (optional)	
<u></u> =, Profiles	US region All entity categories		
La Teams			
🛃 Data Source	Select or invite the user(s) to	the project	Invite user
C My Usage			
2 User Management			

- 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.

Forit SMART REDACT SERVER	Create a project for sensitive data discovery
Contractive Workflow	Invite user ×
 Select profile Create project Select file path 	Invite people to this team, add email address and set the role below, and we will send an email to invite the user. O Member V Add
 ④ File migration ➡ Profiles 	user1@foxitsoftware.com Manager user2@foxitsoftware.com Member
Teams Data Source	invite user
🕹 my Usage	Send Invitation

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	\checkmark	Х	Х
Create organization	\checkmark	Х	Х
View users in organization	\checkmark	\checkmark	\checkmark
Invite and remove users in organization	\checkmark	Х	Х
Change a user's role in organization	\checkmark	Х	Х
Rename the organization	\checkmark	Х	Х
Create project	\checkmark	\checkmark	Х
View users in project	\checkmark	\checkmark	\checkmark
Enable/Disable members in project	\checkmark	\checkmark	Х
Edit the project Rename 	\checkmark	\checkmark	Х
• Modify descriptions of project			
Change connected data source			
Config storage connection	\checkmark	Х	Х
View results	\checkmark	\checkmark	\checkmark

5. 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.

Foxit SMART REDACT SERVER	Select a cloud provider for scanning - we don't store any files.
Projects Active Workflow	Choose a cloud storage:
 Select profile Create project 	📥 🖾 🕼 🕷 ud
3 Select file path	Configuration:
④ File migration	Connection*
Ξ₀ Profiles	Select
🛃 Teams	Select folder
B Data Source	Document Type*
C My Usage	Select v
🎝 User Management	Scheduling Scan 0955 Weekly v from 🗎 (UTC+08:00)Asia/Taipei

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

Add a cloud storage	×
Choose a cloud storage:	
Foxit.SRS_OneDrive	
$(\ensuremath{\overline{\textbf{j}}})$ The same account of the same drive is regarded as one connection.	

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.

OneDrive			>
All files			
NAME	-	DATE	SIZE 🌲
Apps		2024/04/18 17:22:28	-
Attachments		2023/03/31 11:57:11	-
Business@Foxit		2021/09/23 17:14:05	10729.83
Demo		2023/09/27 05:26:36	6.13MB
Demo_Private		2023/09/27 07:28:57	33.33KB
🔽 🗋 Foxit SRS		2025/04/28 11:15:26	5.34MB
FSDD4		2022/12/29 02:12:16	5.68MB
FSDD5		2023/10/05 16:49:43	5.67MB

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.

FOXIC SMART REDACT SERVER	Select a cloud provider for scanning - we don't store any files.
Projects	Channe a cloud statement
Active Workflow	
Select profile	📥 🔤 😰 🗖 nd
Create project	
③ Select file path	Configuration:
File migration	Connection*
≡ ₀ Profiles	Foxit.SRS_OneDrive V
	Root Folder(s)*
Teams	All files/Foxit SRS $ imes$
Data Source	
	Document Type*
My Usage	Şelect Q
🎝 User Management	All types
	pdf
	oob.
	docx
	rtf

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.

SMART REDACT SERVER	Select a cloud provider for scanning - we don't store any files.
Projects Active Workflow Select profile	Choose a cloud storage:
Create project 3 Select file path	Configuration:
(4) File migration ≡₀ Profiles	Connection* Foxit.SRS_OneDrive V
よ Teams	Root Folder(s)*
Data Source	Document Type*
🔮 My Usage	$.pdf \times .doc \times .doc \times .rtf \times .dot \times .dot \times .doc \times .doc m \times .dot m \times .wpd \times .xls \times .xls \times .xlt \times .xlt \times .dot \times .dot \times .dot \times .upd \times .xls \times .xlt \times .xlt \times .upd \times .up$
🎝 User Management	.xltx × .xlsm × .xlsb × .xltm × .csv × .ppt × .ppt × .pot × .pot × .ppt × .ppt × .pps × .pps × .pps × .pps × .pps × .jpg
	$.gif \times \ .tiff \times \ .tif \times \ .txt \times \ .text \times \ .html \times \ .html \times \ .shtml \times \ .vsd \times \ .vsd \times \ .wps \times \ .hwp \times \ .hwp \times \ .html \times \ .tiff \times \ .text \times \ .html \times \ .html \times \ .html \times \ .tiff \times \ .tiff \times \ .tiff \times \ .text \times \ .html \times \ .$
	Scheduling Scan (ON)
	Weekly from 25/05/08 16:30 (UTC+08:00)Asia/Taipei
	Daily Weekly
	Biweekly
	Monthly

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.

REDACT SERVER	For the scanned document(s) with sensitive data, you can copy or move them to other destinations by following simple
Projects	steps:
Active Workflow Select profile Create project Select file path G. File migration	Automatic move or copy OFF Move file(s) with sensitive data to another location once the scan is done Copy file(s) with sensitive data to another location once the scan is done
Ξ₀ Profiles	select a target cloud :
🚉 Teams	Configuration:
🛃 Data Source	Target Connections* Target Root Folder(s)*
🔮 My Usage	
🔓 User Management	Entity Type* Sensitive Level*
	ABA routing number × + 68 × Mid × High × Low ×

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.

Reauthorize the cloud storage	×
In order to be able to move or copy the documents, we need authorize your cloud storage to read and write, do you want to reauthorize?	you to p
cancel	uthorize

- 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.

Automatic move or copy	
Automatic move or copy ON	
Move file(s) with sensitive data to another location once the scar	n is done
O Copy file(s) with sensitive data to another location once the scan	n is done
Select a target cloud :	
e s	📦 nd
Configuration:	
Target Connections*	Target Root Folder(s)*
Foxit.SRS_OneDrive V	All files/Foxit SRS - Sensitive ×
Entity Type* S	Sensitive Level*
ABA routing number × + 68 ×	$Mid \times High \times Low \times$
	Configuration: Target Connections* Foxit.SRS_OneDrive Entity Type* ABA routing number × +68 ×

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

FOXIT SMART REDACT SERVER	Projects	Foxit.SRS ∨					My Apps	0 🔒
Projects	Create New F	Project						
≡ ₀ Profiles	Name	Description	Created Date	Status	Data usage	Last scanned	Actions	
Lams	Project 1	US region All entity categories	17:31:56 08/05/2025	Scanning	0.01GB / 1024.00GB	17:32:00 08/05/2025	⊿ ⊡	Ξ
📓 Data Source								
🔮 My Usage								
🔓 User Management								

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:

Project 1 V ()	Last scanned: 2025	.05.08 H 🕲	Summary Doc	ument list Settings			
General			Documents by Sensitive Le	vel	Document	by Sensitive Dat	a Category
Total Documents	11				BB	Personal	11/11
Documents with sensitive data	11				Ş	Financial	2 /11
Documents redacted	0		High level	Mid level Cow level	•	Medical	11/11
ocuments by Document Ty	rpe & Sensitive Level			Documents by Scanned E	ntity Type		
Document Type	High level	Mid level	Low level	Entities Type	Documents	Total Entities	Sensitive Data Category
xlsx	10	61	16	Location	11	839	Es
docx	16	214	266	Person name	11	923	Ba
pdf	1268	3427	3101	Address	10	34	Ba
doc	0	0	0	U.S. bank account number	1	4	5
rtf	0	0	0	Organization	11	957	80
dot	0	0	0	Credit card	2	1	6
dotx	0	0	0	E-mail	3	5	B2
docm	0	0	0	Amount	8	110	BI
		•					

- 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

Search						Redact	ove To Copy To C
al: 11							
File Name	Source	Sensitive Data Category	Туре	Size	All Status 🍸	Entities By Sensitive High/Mid/Low	Move/Copy to
Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Moved 🖻 🖻	10/61/16	//OneDrive/Foxit SRS - Sensi tive
Basic NDA Sample_JK-2 0211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 🔁 집	4/174/176	//OneDrive/Foxit SRS - Sensi tive
Deep-Document-Refere nce-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 🔁 🛱	117/173/173	//OneDrive/Foxit SRS - Sensi tive
High Court Judgment Te mplate.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved 🔁 🖻	0/788/1337	//OneDrive/Foxit SRS - Sensi tive
MEDICAL-CHRONOLOGI CAL-SUMMARY-DISABIL ITY-SPECIFIC-SAMPLE6 4.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Moved 🔁 🗟	87/61/126	//OneDrive/Foxit SRS - Sensi tive
Medical-Chronologies-c ondition-referenced-Sa mple-32.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 🖻 🗟	347/626/283	//OneDrive/Foxit SRS - Sensi tive
Medical-Chronology-nar rative-tabular18.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	78.21KB	Moved 🔁 🖻	277/465/197	//OneDrive/Foxit SRS - Sensi tive
MEDICAL-SUMMARY-ME DICAL-MALPRACTICE-S ample-93.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	82.95KB	Moved 🕤 🗟	99/73/152	//OneDrive/Foxit SRS - Sensi tive
Sales Agreement_JK-20 211025.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	23.50KB	Moved 🕑 🖻	12/40/90	//OneDrive/Foxit SRS - Sensi tive
Sample Inpatient Health Record.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Security , Financial, Medical	pdf	4.09MB	Moved 🖻 🖻	111/965/708	//OneDrive/Foxit SRS - Sensi tive
Sample Medical Record	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	82.90KB	Moved 🕤 🖻	230/276/125	//OneDrive/Foxit SRS - Sensi

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.

2,5	earch						Source: //OneDrive/Foxit SRS	
al:	11						Size: 82.90KB Sensitive Category: Personal, Sensitive, Medical	
	File Name	Source	Sensitive Data Category	Туре	Size	All	Total entities detected: 631 Sensitive Level: High 230	
	Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Мо	Mid 276	
	Basic NDA Sample_JK-2 0211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Mo		
	Deep-Document-Refere nce-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Mo	Sensitive data list Position History	
	High Court Judgment Te mplate.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Мо	> Personal	
	MEDICAL-CHRONOLOGI CAL-SUMMARY-DISABIL ITY-SPECIFIC-SAMPLE6 4.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Mo	V Sensitive Marital Status Divorced	
	Medical-Chronologies-c ondition-referenced-Sa mple-32.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Мо	Gender ·	
	Medical-Chronology-nar rative-tabular18.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	78.21KB	Мо	Data a	
	MEDICAL-SUMMARY-ME DICAL-MALPRACTICE-S	//OneDrive/Foxit SRS	Personal, Medical	pdf	82.95KB	Мо	Race: Black	
	Sales Agreement_JK-20 211025.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	23.50KB	Mo	> Medical	3
	Sample Inpatient Health Record.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Security , Financial, Medical	pdf	4.09MB	Мо		
	Sample Medical Record	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	82.90KB	Мо		

Sample Medical Re	cord - Monica Latte.pdf		Sample M	edical Reco	ord - Monica Latte.pdf
Source:	//OneDrive/Foxit SRS		Source:		//OneDrive/Foxit SRS
Size:	82.90KB		Size:		82.90KB
Sensitive Category:	Personal, Sensitive, Medical		Sensitive Category		Personal, Sensitive, Medical
Total entities detected:	631		Total entities detec	ted:	631
Sensitive Level	High 220		Consitius Lough		High 220
Sensitive Level:	High 230		Sensitive Level:		nign 230
	Mid 276	D			Mid 276
	Low 125				Low 125
		D			
ensitive data list Positio	n History	s	ensitive data list	Position	History
{			08/05/25 23:25:40	testsrs-us0 //OneDrive/f	2@test.srs.com moved this file to Foxit SRS - Sensitive
"count": 156, "model": "Perconal		5	08/05/25 23:24:55	testsrs-us0	2@test.srs.com rescanned the fil
"entities": [,				
{					
"type": "DateT	ime",	D			
"count": 18,					
"level": "Low"					
"name": "DateT	ime",				
"items": [D			
1 "text", "A	nril 2011".				
"count": 2					
"searchLis	t": [D			
{					
"pageI	ndex": 0,				
"rects	': [D			
{					
"t()p": 022.85016, oft": 97.35052				
"h	nttom": 614.36414.	D			
"r	ight": 130.3772				
}		D			
1					
},					
{		D			
"pageI	1dex": 0,				
"rects"	· · · ·				
1 "+	op": 622.85016.				
"1	eft": 87.35052,				
"b	attom": 614.36414.				

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.

२ ः tal:	earch						Redact M	ove To Copy To
	File Name	Source	Sensitive Data Category	Туре	Size	All Status 🍸	Entities By Sensitive High/Mid/Low	Move/Copy to
	Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Moved 🖻 🗟	10/61/16	//OneDrive/Foxit SRS - Sens tive
	Basic NDA Sample_JK-2 0211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 🖻 🗟	4/174/176	//OneDrive/Foxit SRS - Sens tive
	Deep-Document-Refere nce-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 🕤 🖻	117/173/173	//OneDrive/Foxit SRS - Sens tive
	High Court Judgment Te mplate.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved 🗟 🖻	0/788/1337	//OneDrive/Foxit SRS - Sens tive
2	MEDICAL-CHRONOLOGI CAL-SUMMARY-DISABIL ITY-SPECIFIC-SAMPLE6 4.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Scanned 🗟	87/61/126	
	Medical-Chronologies-c ondition-referenced-Sa	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 🖻 🗟	347/626/283	//OneDrive/Foxit SRS - Sens tive

- 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.

Project 1 V 🛞 La	ast scanned: 2025.05.08 🖁	Summary	Document	list Setting	gs		
Q Search Total: 11						Redact	оче То Сору То 🛈
File Name	Source	Sensitive Data Category	Туре	Size	All Status 🍸	Entities By Sensitive High/Mid/Low	Move/Copy to
Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xisx	69.07KB	Moved 🖻 🖻	10/61/16	//OneDrive/Foxit SRS - Sensi tive
Basic NDA Sample_JK-2 0211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 🖻 🖻	4/174/176	//OneDrive/Foxit SRS - Sensi tive
Deep-Document-Refere nce-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 🖻 🖻	117/173/173	//OneDrive/Foxit SRS - Sensi tive
High Court Judgment Te mplate.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved	0/788/1337	//OneDrive/Foxit SRS - Sensi tive
MEDICAL-CHRONOLOGI CAL-SUMMARY-DISABIL ITY-SPECIFIC-SAMPLE6 4.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Scanned a	87/61/126	
Medical-Chronologies-c ondition-referenced-Sa mple-32.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 🖻 🛛	347/626/283	//OneDrive/Foxit SRS - Sensi tive

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

	Project 1 V 🕓 Las	st scanned: 2025.05.08 🗎	Summary	Document	list Setting	js		
Q s	earch						Redact	ove To Copy To
stal:	File Name	Source	Sensitive Data Category	Туре	Size	All Status 🍸	Entities By Sensitive High/Mid/Low	Move/Copy to
	Bank Statement Sample 3_JK-20211022.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Moved 🖻 🖻	10/61/16	//OneDrive/Foxit SRS - Sensi tive
	Basic NDA Sample_JK-2 0211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 🖻 因	4/174/176	//OneDrive/Foxit SRS - Sensi tive
	Deep-Document-Refere nce-Sample-56.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 🖻 🖻	117/173/173	//OneDrive/Foxit SRS - Sensi tive
	High Court Judgment Te mplate.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved 🔁 🗟	0/788/1337	//OneDrive/Foxit SRS - Sensi tive
2	MEDICAL-CHRONOLOGI CAL-SUMMARY-DISABIL ITY-SPECIFIC-SAMPLE6 4.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Scanned a	87/61/126	
	Medical-Chronologies-c ondition-referenced-Sa mple-32.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 🖪 🖻	347/626/283	//OneDrive/Foxit SRS - Sensi tive

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).

Cho	oose whether to replace the original file(s) with redacted file(s)
۲	Do not replace
	Customize the suffix for redacted files
	_redacted Sample: Test file_redacted.pdf
	Replace

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.

२ Sea tal: 11	rch						Redact	ove To Copy To
Fi	ile Name	Source	Sensitive Data Category	Туре	Size	All Status Ÿ	Entities By Sensitive High/Mid/Low	Move/Copy to
	Bank Statement Sa mple 3_JK-202110 22.xlsx	//OneDrive/Foxit SRS	Personal, Financial, Medical	xlsx	69.07KB	Moved 🖻 🗟	10/61/16	//OneDrive/Foxit SRS - Sensi tive
	Basic NDA Sample_ JK-20211022.docx	//OneDrive/Foxit SRS	Personal, Medical	docx	40.77KB	Moved 🔁 🗟	4/174/176	//OneDrive/Foxit SRS - Sensi tive
	Deep-Document-Re ference-Sample-56. pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	67.65KB	Moved 🖪 🖻	117/173/173	//OneDrive/Foxit SRS - Sensi tive
	High Court Judgme nt Template.pdf	//OneDrive/Foxit SRS	Personal, Medical	pdf	618.82KB	Moved 🖻 🖻	0/788/1337	//OneDrive/Foxit SRS - Sensi tive
	HEDICAL-CHRONO OGICAL-SUMMAR Y-DISABILITY-SPECI FIC-SAMPLE64_red acted_2025050817 0207.pdf	//OneDrive/Foxit SRS		pdf	592.06KB	Redacted 🕄	0/0/0	
	MEDICAL-CHRONO LOGICAL-SUMMAR Y-DISABILITY-SPECI FIC-SAMPLE64.pdf	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	71.64KB	Scanned ସ୍ଥି	87/61/126	
	Medical-Chronologi es-condition-refere nced-Sample-32.pd	//OneDrive/Foxit SRS	Personal, Sensitive, Medical	pdf	142.22KB	Moved 🖻 🗟	347/626/283	//OneDrive/Foxit SRS - Sensi tive

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



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

For Project 1 V ③ Last scan	ed: 2025.05.08 🗄 🕥 Summary Document list Settings
O Total users	1 Target paths (Folders)
Basic settings Target scan source	settings File migration settings User access settings
Set the name and the model of the p	roject here Edit
Project Name	Project Description
Project 1	US regionAll entity categories
Profile Used	
Foxit_US-All	v

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.

For the REDACT SERVER	Profiles	🗱 My Apps 🛛 🗿 🚨
Projects	Choose a sample profile to start:	
=₀ Profiles	Bank account info Preset group for financial data. learn more >	Preset group for health care providers
👸 Data Source		
C My Usage	Information security Preset group for IP address, user name.	
🎝 User Management	learn more >	
	Choose a customize profile to start:	
	Customize a profile Customize the entities you want to discover	

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.

SMART REDACT SERVER	Teams		ႈ Му Аррз
Projects	My Teams Teams I belong to		Create a Team
≡ ₀ Profiles	Team Name	Status	Actions
🚉 Teams	Foxit.SRS	Active	2 C Ū
🖁 Data Source			
🔮 My Usage			
🔓 User Management			

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.

Forit SMART REDACT SERVER	Data Source				🗱 My	Apps 🕐 🚨
Projects	Add Connection					
≡ ₀ Profiles	Connection Name	Туре	Account	URL/S3 Bucket	Status	Actions
🚉 Teams	Foxit.SRS_OneDrive	 OneDrive 	jason_kao@foxitsoftware.com		Connected	▯∠
😹 Data Source						
🔮 My Usage						
🎝 User Management						

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.

Forit SMART REDACT SERVER	My Usage			🗱 My Apps 🕘 🚨
Projects	Summary	Purchase to get more		
2: Teams	Total storage 1TB	Used storage	Available Usage	Expired O
Data Source	Project Usage Foxit.SRS ∨			Manage Project
User Management	Number of projects		Usage by project	
	Total Project Usage 0.01TB / 1.00TB	\square	000	11
	Projects Name Status Project 1 Scanned		Storage/Total	Actions
			0.01GB / 1024.00GB	

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.

For the smart redact server	My Usage			🐮 My Apps 🛛 🕐
Projects	Summary	Setting	×	Purchase to get more
Lat Teams	Total storage	here is 0TB usage that can be allocated to the Available Usage 0TB	ge project.	Expired O
Data Source	Project Usage Foxit.SF	Project 1		Manage Project
C My Usage	Number of projects	Used storage 0.01GB Total storage 1 TB • •		
	Total Project Usage		Submit Project 1	
	Projects Name	Status S	torage/Total	Actions
	Project 1	Scanned 0	.01GB / 1024.00GB	۲

User Management

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

SMART REDACT SERVER	User Managen	nent 🕕				🚼 My Apps	0 🔒
Projects	Invite user						
≡ ₀ Profiles	Act	ive users		Open invites	2	Inactive users	0
🚉 Teams							
🐻 Data Source	Total (0)						
A Mulleage	NAME	EMAIL	ROLE	STATUS	TEAM	CREATE TIME	ACTION
• My Usage	user1	user1@foxitsoftware.c om	Manager		Foxit.SRS	22:45:07 2025.05.08	D Ū
20 User Management	user2	user2@foxitsoftware.c om	Member		Foxit.SRS	22:45:07 2025.05.08	

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.

SMART REDACT SERVER	User Management	User R	oles				🚼 My Apps	0
Projects	Invite user	Perr	nission	Admin	Manager	Member		
Ξ. Profiles	Active us	View ers man	v and lage	~	×	×	() Inactive users	0
Teams		billin	ng					
B Data Source	Total (0)	Crea	ate team	~	×	×		
A Mylicane	NAME EMAIL	EMAIL	Viewusers				CREATE TIME	ACTION
iny osuge	user1	user1: in te om	am	~	~	~	22:45:07 2025.05.08	1 1 1
o User Management	user2	user2@toxitsof	tware.c	Member		Foxit.SRS	22:45:07 2025.05.08	1 1 1

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.

👫 My Apps	0 🔒
Inactive users	
CREATE TIME	ACTION
22:45:07 2025.05.08	
22:45:07 2025.05.08	

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: <u>Support Center</u> 1-866-MYFOXIT, 1-866-693-6948
- Website:
 <u>www.foxit.com</u>