

# **Electronic Redaction:**

**How to Properly  
Redact Documents**

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Electronic redaction is a relatively simple process. Why then, have so many agencies and companies—including Whole Foods, SCO, the U.S. military (repeatedly), law firms and, most recently, Facebook—released improperly redacted documents that landed them in scandalous headlines?

## What Is Improper Redaction?

Improper redaction is any attempt at blocking sensitive content using a method that only blocks the visible text on the screen, but leaves the underlying content accessible by a simple copy and paste. Here is the usual scenario.

1. Open the document in Microsoft® Word and use a solid black drawing shape to cover the text to be redacted.
2. Convert the Word document to PDF. The drawing shape gets converted and cannot be deleted from the PDF so it seems secure.
3. Release the document, thinking the confidential text is properly concealed.
4. A savvy journalist or other interested party selects all the text around the redacted area and pastes it into an application like Word or Notepad. The text under the black box is revealed in its entirety. More sophisticated users can use a metadata-revealing application to access all prior revisions to the document, which also are embedded in the PDF. This can be particularly embarrassing because it reveals comments made on the original document as well.

## What Is the Right Way to Redact?

There are actually a number of ways to properly redact a document, depending on your volume and security needs.

1. **Select a Redaction Expert.** Obviously this person must be someone you trust with sensitive information, so choose carefully. This person will be responsible for setting up the company's redaction policy, including recommending or selecting the redaction tool (or working with I.T. to do so), learning to use the selected tool properly, and then either performing all redactions or training other users.
2. **Write a formal Redaction Policy.** Who performs redaction? What kind of documents require it? In short, document all steps a new employee would need to know about the proper redaction procedure at your company.
3. **Identify your redaction needs.** A redaction tool that really fits your needs can save a lot of time. Do you need native format redaction with metadata scrubbing? This is more risky and should be undertaken with caution, but can be done successfully by a sufficiently educated and careful employee. If the redacted file should be PDF or TIFF, there are more redaction options available, most of which are quite simple. When evaluating these tools consider the following:

- a. Do you need extensive logging (a good idea in eDiscovery, should counsel need to prove due diligence in protecting client's privilege)?
  - b. How does the tool handle metadata? Does it bring any metadata over to the final, redacted document? Does it offer tools to search and protect metadata?
  - c. Are you concerned about masking the length of redacted words? Some applications may substitute text like "redacted" for each redacted word, ensuring the original word length is also obscured.
  - d. What is the volume of documents you need to redact? Do you want a server-class product that can be integrated to your existing system or a desktop application?
  - e. Would a tool with intelligent search capabilities, pattern matching (e.g., find and redact all social security numbers) or the ability to record reusable redaction scripts be helpful?
4. **Choose your output format.** Many tools can output to TIFF, which is inherently a "flat" format. Because it is really an image format, not a document format, most versions of TIFF have no concept of change revisions, hyperlinks or bookmarks. Most TIFF versions don't even have searchable text, so what you see on the screen really is what you get. (Do note that some proprietary versions of TIFF, like Microsoft's, can include metadata. While it is important to be aware of this, redaction tools should not be using these types of TIFF, so it should not be relevant here.)
5. **Verify your proposed redactions before finalizing.** There is no substitute for the human review. Before finalizing your redactions, verify that all redaction entities fully cover all text. Some redaction tools have features to make this pretty efficient, like stepping the reviewer through each entity. This step is particularly important when redacting against a search phrase (or set of search phrases), and more specifically when doing so on a scanned document that has undergone Optical Character Recognition (OCR) to make the text readable. Again, remember that what you see on the screen doesn't always match the "language" or content of the document as it is read by applications, so some shifting may occur. The reviewer should be made aware of whether the document was created electronically or scanned so they are alerted to possible issues beforehand.
6. **Verify the final redacted document.** In your final, redacted PDF, select text starting several lines above your redacted area and ending a line or two below it. Paste that content into an application like Word or Notepad. Make sure the redacted text is not present. Once you are comfortable with your redaction tool, you probably won't need this step, but until then, better safe than sorry.

*Learn more about electronic redaction at [www.redact-it.com](http://www.redact-it.com).*

**About the Author**

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