

# CHAPTER 10 REDACTION FEATURE

## TOPICS COVERED IN THIS CHAPTER

- ◆ ENTERING A FILING WITH REDACTED DOCUMENTS
- ◆ DELETING A REDACTION
- ◆ WORKING WITH AN EXISTING REDACTION
- ◆ REDACTION EDITOR TOOLBAR
- ◆ REDACTION ERRORS

In Release 2018.0 and later, the Odyssey File & Serve system supports the Redaction feature. Filers can redact a document, view the redacted document, and then make modifications, if necessary, before uploading the redacted document to the case management system.

**i Note:** The Redaction feature is configured by Tyler and may not be available on your system.

**i Note:** You can perform redactions by using the Redaction Editor (which is displayed as the *Tyler Content Manager* window). This window opens in a separate tab in your browser. You must enable pop-ups in your browser settings to view the Redaction Editor (*Tyler Content Manager* window) and to perform redactions. The icons that are visible in the Redaction Editor (*Tyler Content Manager* window) may differ slightly from the screen shots contained in this document.

The following data is automatically redacted:

- Social Security Numbers
- Tax ID Numbers (EIN)
- Passport Numbers
- Credit Card Numbers
- Driver's License Numbers
- Account Numbers
- Government ID Numbers
- Names of Minors listed as parties on the case
- Dates of Birth of Minors
- Addresses of Minors listed on the case

## ENTERING A FILING WITH REDACTED DOCUMENTS

You can enter a filing in which you upload a redacted lead document and redacted attachments if applicable.

You must be logged on to the Odyssey File & Serve system to perform this procedure.

To enter a filing with redacted documents, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

**i Note:** You can also click **Start a New Case on the Filer Dashboard in the New Filing section**.

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.

3. Complete all required fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section:

**Figure 10.1 – Filings Section**

- a. Select a filing type from the **Filing Type** drop-down list.
- b. Select a filing code from the **Filing Code** drop-down list.

**Note:** Depending on your system configuration, some filing codes cause the **Due Date** field to be enabled.

After you select the filing code, the fee associated with the filing code is displayed.

- c. Type a description of the filing in the **Filing Description** field.
- d. Type a client reference number in the **Client Reference Number** field.

**Note:** A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

- e. Type any relevant comments in the **Comments to Court** field.
- f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.
- g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.
- h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

**Note:** The **Due Date** field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

- i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

**Note:** The **Filing on Behalf of** feature is configured by Tyler and may not be available on your system.

- j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

**Note:** Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

**Note:** The **Lead Document** field is required. You can upload only one document as a lead document. Only the following file types are supported: PDF and TIFF.

Figure 10.2 – Lead Document Field in the Filings Section

- k. Type a name for the lead document in the **Description** field.

**Note:** Tyler can configure a maximum length for the document name at the client's request. When the maximum length is configured, if you assign a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

- l. Select the level of security to attach to the document from the **Security** drop-down list.

- m. If you want to have the document automatically redacted, click

Auto-Redaction

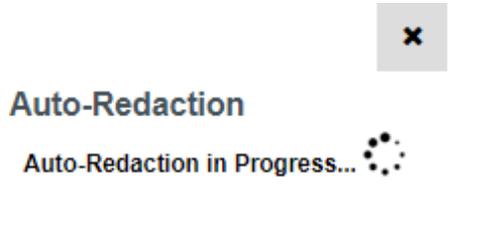
**Note:** The **Redaction** feature is configured by Tyler and may not be available on your system.

**i Note:** You can upload multiple documents to be redacted. Click



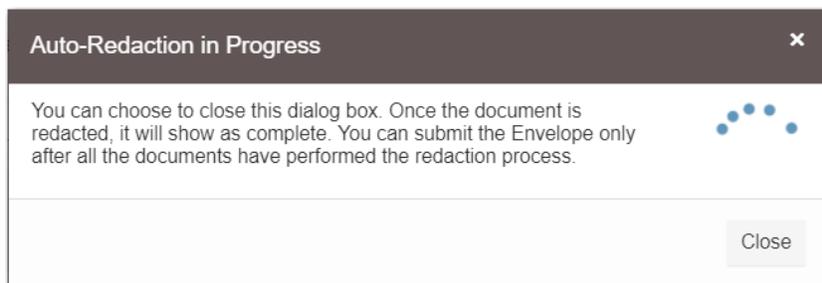
after each document.

n. Wait while the system performs the redactions.



**Figure 10.3 – Auto-Redaction in Progress Verification**

The following dialog box is displayed.



**Figure 10.4 – Auto-Redaction in Progress Dialog Box**

You can close the dialog box while you wait. When the auto-redaction is complete, the system displays the number of redactions that were found in the document.

o. If you want to view the redacted areas, click 

The redacted document is displayed in the Redaction Editor (*Tyler Content Manager* window) in a new tab in your browser.

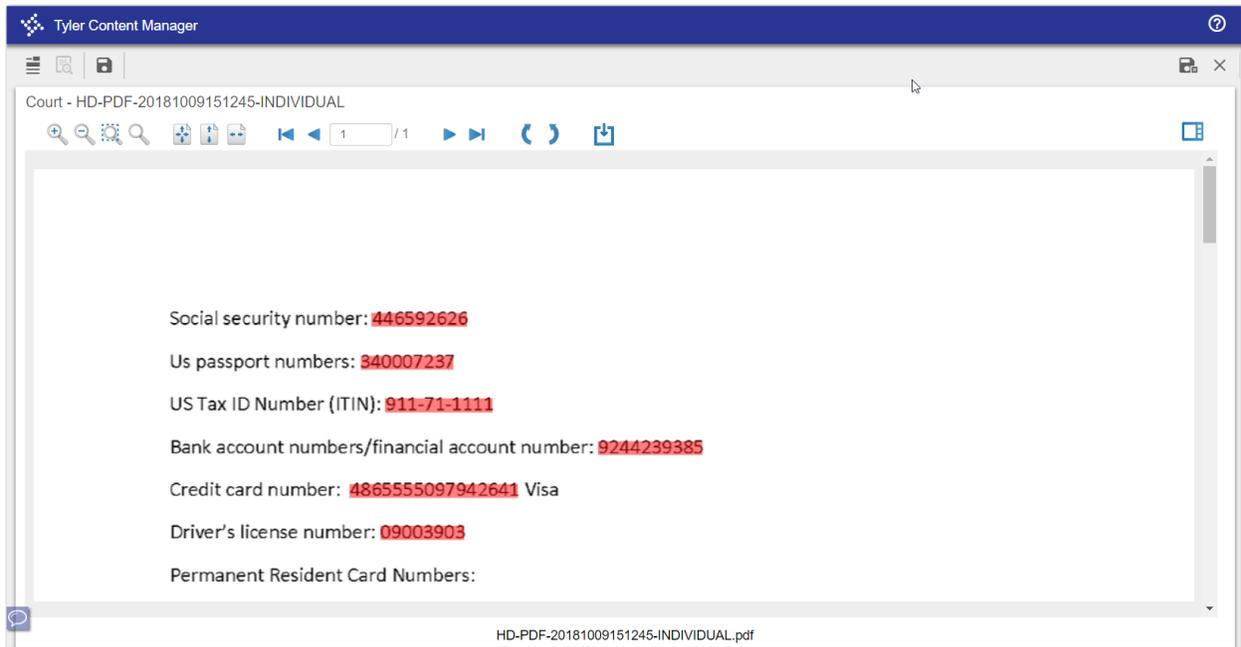


Figure 10.5 – Redaction Editor (Tyler Content Manager Window)

- p. In the Redaction Editor (*Tyler Content Manager* window), perform manual redactions as necessary.



Click , and then highlight the area of the document that you want to redact. Continue to redact the desired sections of the document.

**Note:** Another way that you can apply a redaction on a text-based, non-scanned PDF document is to highlight the word directly on the image (click and drag), and then right-click to select Redact from the drop-down list.

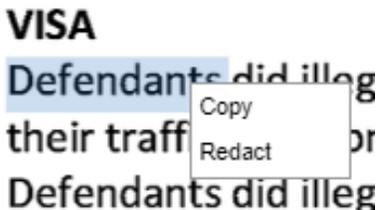


Figure 10.6 – Redaction Options Drop-Down List

**Note:** If you want to delete a redaction, right-click the specified redaction.



- q. When you are done performing the redactions, click .
- r. Close the Redaction Editor (*Tyler Content Manager* window).



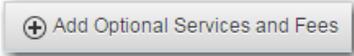
**Note:** Tyler recommends that you click  (Close viewer) or  (Save and close viewer) to close the view rather than the browser's “Close” button.

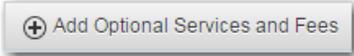
- s. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

**Note:** Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.



- t. If you want to redact the attachment, click . Perform the same redaction steps for the attachment as you did for the lead document.



- u. If you want to add an optional service to the filing, click .

The **Optional Services and Fees** field is displayed.

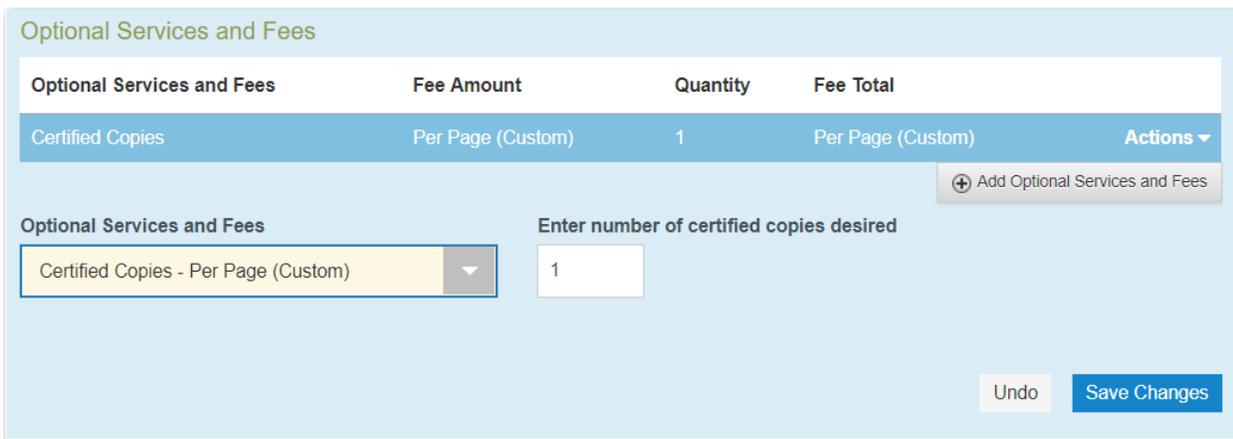


Figure 10.7 – Optional Services and Fees Field in the Optional Services and Fees Section

- v. Select the optional service from the **Optional Services and Fees** drop-down list.



Figure 10.8 – Optional Services and Fees Drop-Down List

- w. Add more optional services if you want.

**Note:** If you try to add the same service twice, a warning message is displayed.

**Note:** If you want to remove the specified optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

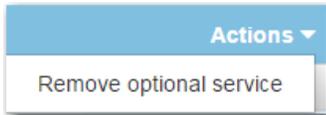
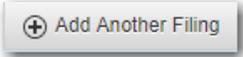


Figure 10.9 – Optional Service Actions Drop-Down List

- x. When you are done adding optional services, click .
- Note:** After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.
- y. If you want to add another filing to the case, click .
- The top of the **Filings** section is displayed, where you can begin another filing.
- z. Click  to save your changes, or click  to cancel the action.
- After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.
  - Complete the required fields in the **Fees** section.
  - Click .
  - Click  to review a summary of your filing.
  - When you are satisfied with the information in your filing, click .

## DELETING A REDACTION

After you mark a section to be redacted and before you close the Redaction Editor (*Tyler Content Manager* window), you can delete the specified redaction.

**Note:** The Redaction feature is configured by Tyler and may not be available on your system.

**Note:** You must enable pop-ups in your browser settings to view the Redaction Editor (*Tyler Content Manager* window).

To delete a redaction in a document before you have closed the Redaction Editor (*Tyler Content Manager* window), perform the following steps:

- Right-click the specified redaction.

The *Annotation Notes* dialog box is displayed.

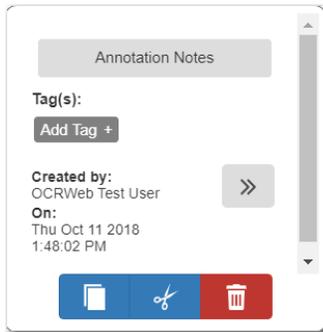


Figure 10.10 – Annotation Notes Dialog Box

**Note:** From the *Annotation Notes* dialog box, you can also annotate the redaction, copy the redaction, or cut the redaction and paste it in another part of the document. And you can view a detailed history of the redactions that were performed in the document. Click  to view the detailed history.

2. Click  to delete the redaction.

The *Delete Annotation* dialog box is displayed.

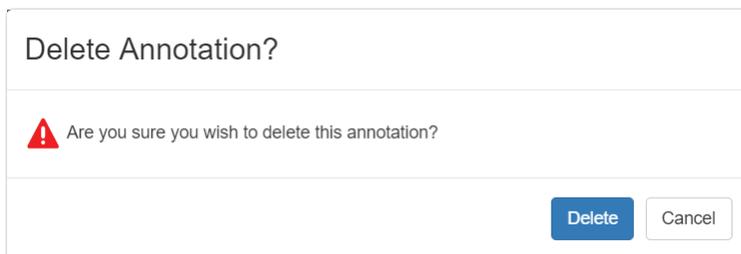


Figure 10.11 – Delete Annotation Dialog Box

3. Click  to delete the specified redaction.

## WORKING WITH AN EXISTING REDACTION

You can resize or move an existing redaction in the Redaction Editor (*Tyler Content Manager* window).

**Note:** The Redaction feature is configured by Tyler and may not be available on your system.

**Note:** You must enable pop-ups in your browser settings to view the Redaction Editor (*Tyler Content Manager* window).

To work with an existing redaction, perform the following steps:

1. Turn off the manual redaction capability by clicking .
2. Locate the existing redaction that you want to resize or move, and then click the block of text.
3. Resize the redaction, or move the redaction to another location in the document.

4. When you are done, click  to save your changes or click  to save your changes and close the viewer.

## REDACTION EDITOR TOOLBAR

You can use icons to navigate in the Redaction Editor (which is displayed as the *Tyler Content Manager* window).

**Note:** The icons that are visible in the Redaction Editor (*Tyler Content Manager* window) may differ slightly from the screen shots contained in this document.

The following table describes the icons in the Redaction Editor (*Tyler Content Manager* window).

Icon	Description
	Click this icon to begin to perform a redaction.
	Click this icon to stop performing a redaction.
	Click this icon to save the document.
	Click this icon to save and close the document.
	Click this icon to close the TCM viewer.
	Click this icon to zoom in to a particular place in the document.
	Click this icon to zoom out.
	Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom.
	Click this icon to magnify an area of the document.
	Click this icon to fit the document to the window.
	Click this icon to fit the document to the height of the window.
	Click this icon to fit the document to the width of the window.

Icon	Description
	Click this icon to view the first page of the document.
	Click this icon to view the previous page of the document.
	Use this window to view the current page of the document and the length of the document.
	Click this icon to view the next page of the document.
	Click this icon to view the last page of the document.
	Click this icon to rotate the document to the right.
	Click this icon to rotate the document to the left.
	Click this icon to download the document. <b>Note:</b> You will be prompted to save the document before you download it.
	Click this icon to toggle thumbnails of the document pages.

When the thumbnail pane is displayed, additional document options become available.



**Figure 10.12 – Example of a Thumbnail Pane**

The following table describes the icons in the thumbnail pane.

Icon	Description
	Click this icon in the thumbnail pane to view the pages of the document in the Redaction Editor.
	Click this icon in the thumbnail pane to move to the previous annotation page.
	Click this icon in the thumbnail pane to move to the next annotation page.
	Click this icon in the thumbnail pane to view only the pages that have a redaction on them.

## REDACTION ERRORS

Occasionally, a document may fail to redact automatically. If this situation occurs, you can still redact the specified document manually.

If a document fails to redact during the automatic redaction process, an error icon is displayed above the **View/Edit Redaction(s)** button.



Figure 10.13 – Error Icon Displayed in the Auto-Redaction Section

Pause on the icon to view a tooltip.

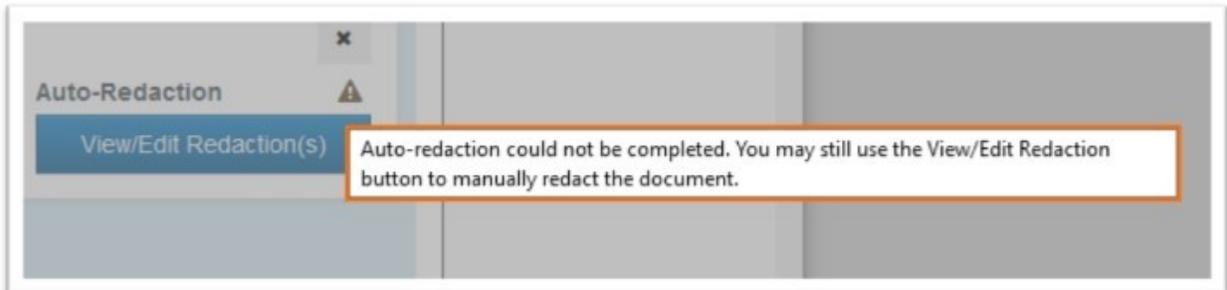


Figure 10.14 – Tooltip Displayed in the Auto-Redaction Section