Foxit Redaction Plugin for Microsoft Word (Preview) Beta Testing Overview & User Guide

Overview

"Redact - To select or adapt (as by obscuring or removing sensitive information) for publication or release" ("Merriam-Webster").

Historically, in order to redact a highly sensitive document it would need to be converted to an image or to PDF and then the sensitive information would be 'cut out', blocked or redacted.

Until now, there has been no method to distribute information from a document prior to making it available to all unauthorized users *and* include the protected original with it. Foxit has worked closely with the Microsoft RMS team to respond to this need.

This solution will allow you to create a redacted RMS protected PDF document from within Microsoft Word 2013 and protect the sensitive information with a policy using Microsoft Rights Management. The protected PDF document will display the redacted Word document within any popular PDF viewer and also allow RMS enabled PDF viewers to unprotect and display the original un-redacted Word document.

Foxit's new Redaction Plugin for Microsoft Word enables end-users to create redacted RMS Protected PDF documents directly within Microsoft Word. The beta version of the Foxit Redaction Plugin for Microsoft Word is shipped within a Generally Available version of the Foxit PhantomPDF *Business* product. Once the packaging requirements are established, the Redaction Plugin is planned to be release both as a stand-alone application and bundled within PhantomPDF.

Using the "Foxit PDF" Plugin in Microsoft Word, one can create a protected PDF file by converting the currently open Word document with the ability to display two unique views within a single PDF document.
- A view of the redacted document can be viewed in any PDF reader by anyone without any restrictions or authorization.
- A view of the un-redacted document can be viewed in any RMS enabled PDF reader by anyone with the proper credentials and authorization.

System Requirements:
- Microsoft Word® 2013
    - .docx format
- Recommended Minimum Hardware for Better Performance
    - 1.3 GHz or faster processor.

- o 512 MB RAM (Recommended: 1 GB RAM or greater).
- o 1 GB of available hard drive space.
- o 1024*768 screen resolution.
- Operating Systems
  - o Windows 8 Full Version.
  - o For users utilizing the Active Directory Rights Management Service and SharePoint integration capability, Windows 7 or Windows Vista with Service Pack2 (SP2) is required.
  - o Verified as Citrix Ready® with Citrix XenApp® 6

<u>Beta Program Contact</u>
- Bill Bean – bill_bean@foxitsoftware.com

<u>Feedback</u>
- You can report any issues or feedback directly at this page - http://tickets.foxitsoftware.com/ticket-phantompdf-beta.php

Using the new Redaction Plugin for Microsoft Word, user can select the text any content they want to redact and mark them using the "Mark for reduction" button in the "Foxit PDF" plugin Ribbon tab.   The selected sensitive information will be marked in a gray shade with a tag named "Redacted".   User can then click on the "Create Redacted" button on the same Ribbon, select a RMS restriction template to use, then create and save a two stream PDF file.   Once created, the two-stream PDF file will be opened in PhantomPDF, an RMS enabled PDF reader/editor, allow user to inspect and edit both streams.   User can switch between the Redacted stream and Protected stream by toggle between "View the full content" and "Redacted Mode" on the message bar on top of the document.

Exact beta testing steps are described below with screenshots. The methods in which you can communicate your feedback to us are listed on the last page of this document.

Foxit Redaction Plugin for Microsoft Word Testing Guide

The feature is designed and developed by Foxit Software working with the Microsoft RMS team. This is a new method to protect PDF through RMS Redaction in Microsoft Word 2013. Allows you to remove sensitive information from your document prior to making it available to others.

The plugin can be manually loaded within Word by following this path: File, Options, Add-Ins, COM Add-ins, Go, and checking PhantomPDF Creator COM Add-in. as shown below:
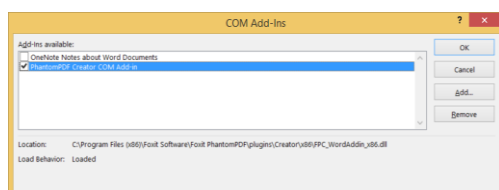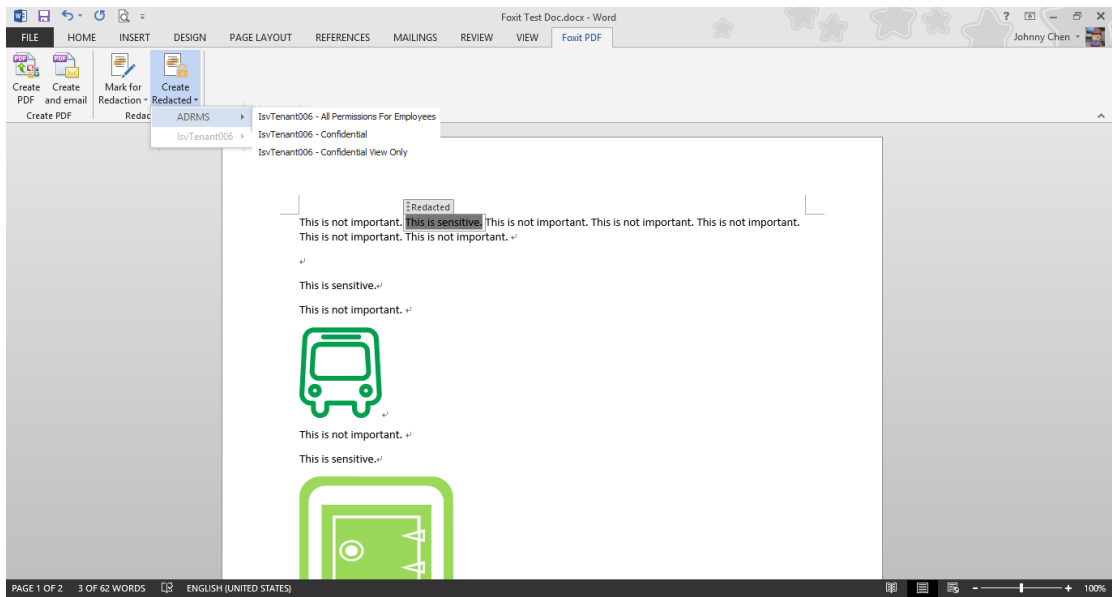
1) Start by opening a Word document that contains some sensitive information
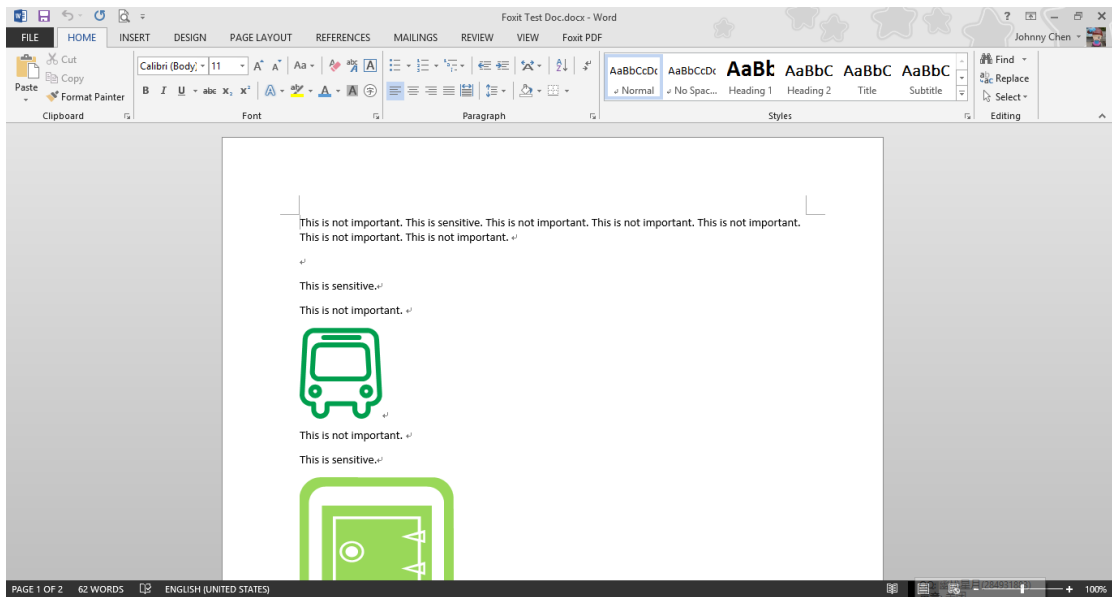
2) The user switches to Foxit PDF plugin, selects some sensitive text (e.g. PII, SSN), and click on the "Mark for Redaction" button to mark it for redaction.
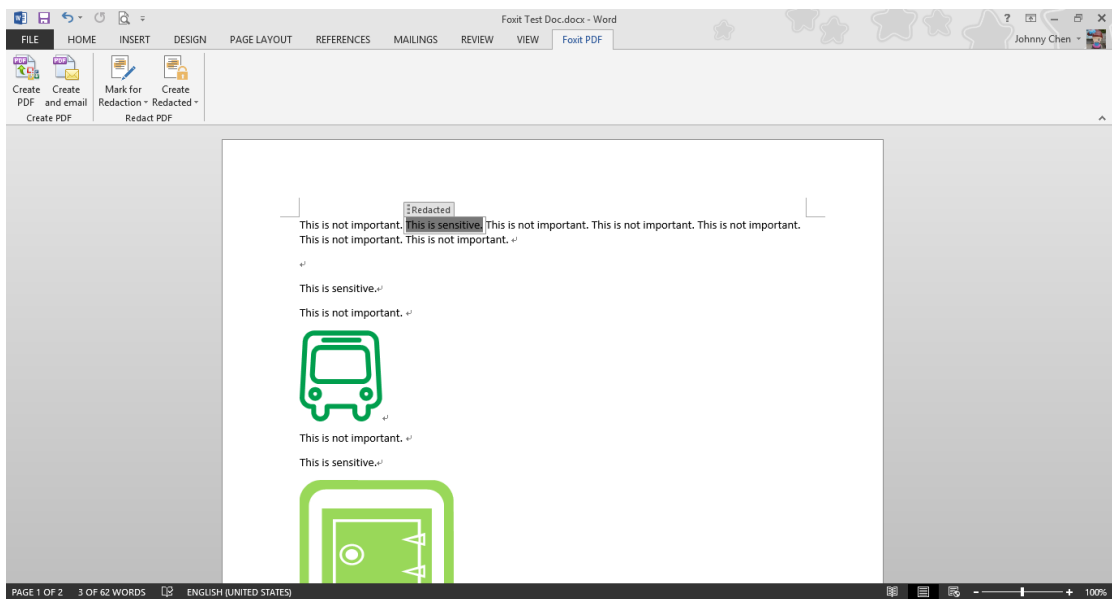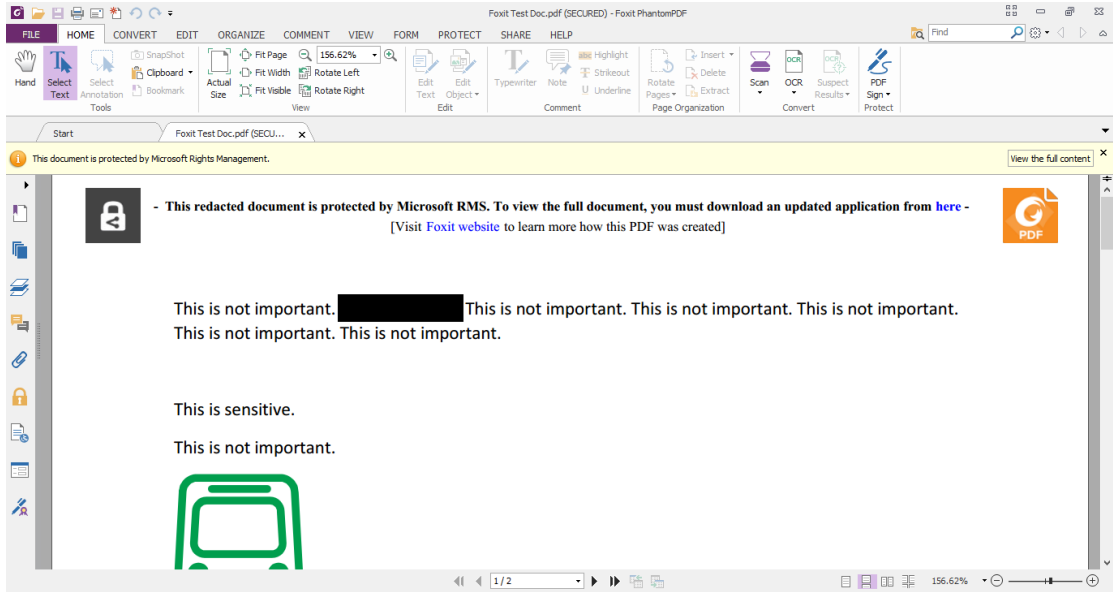

3) The user clicks on "Create redacted" button and chooses the RMS template "Confidential".

4) The save file dialog appears right after, the user puts a filename and clicks Save.
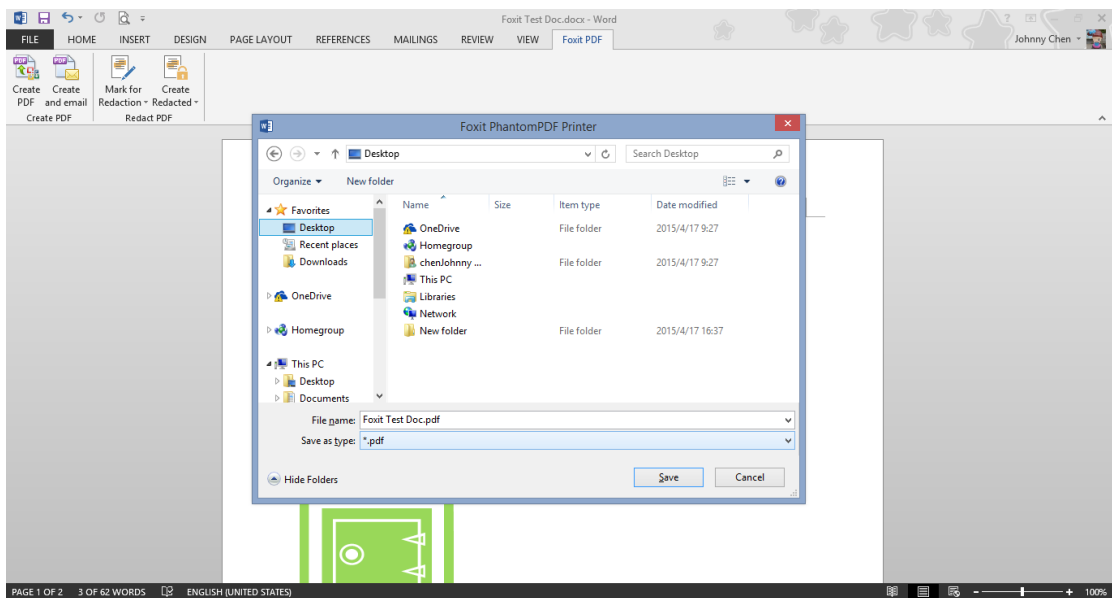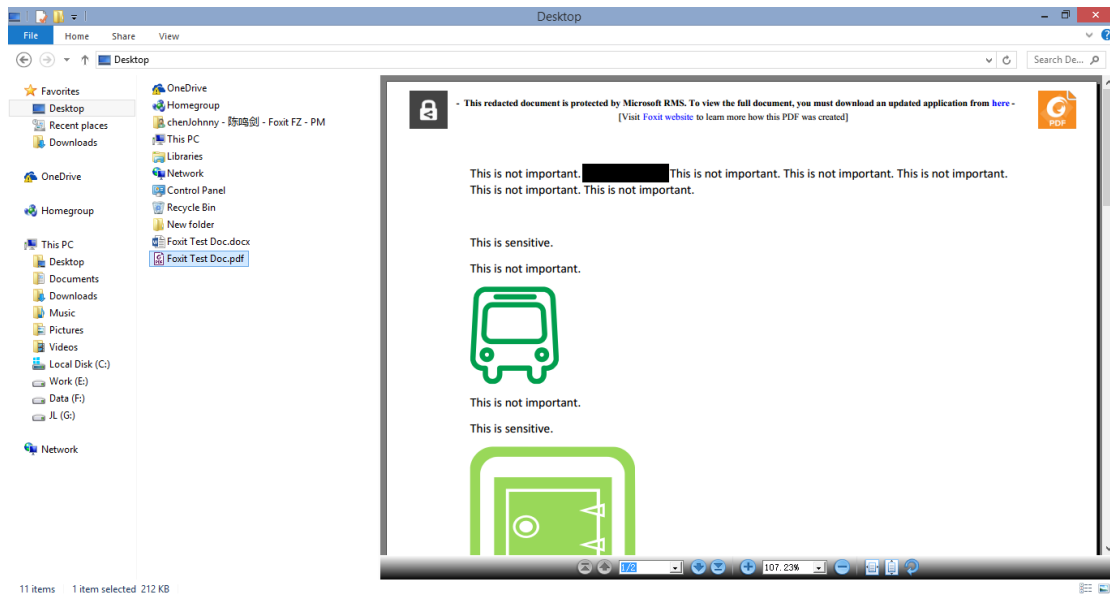

5) PhantomPDF *Business* opens the new document in redacted mode. The owner looks for the redacted parts. Then, he switches to the full content.

6) The owner now sees the full content with IRM rights enforced.
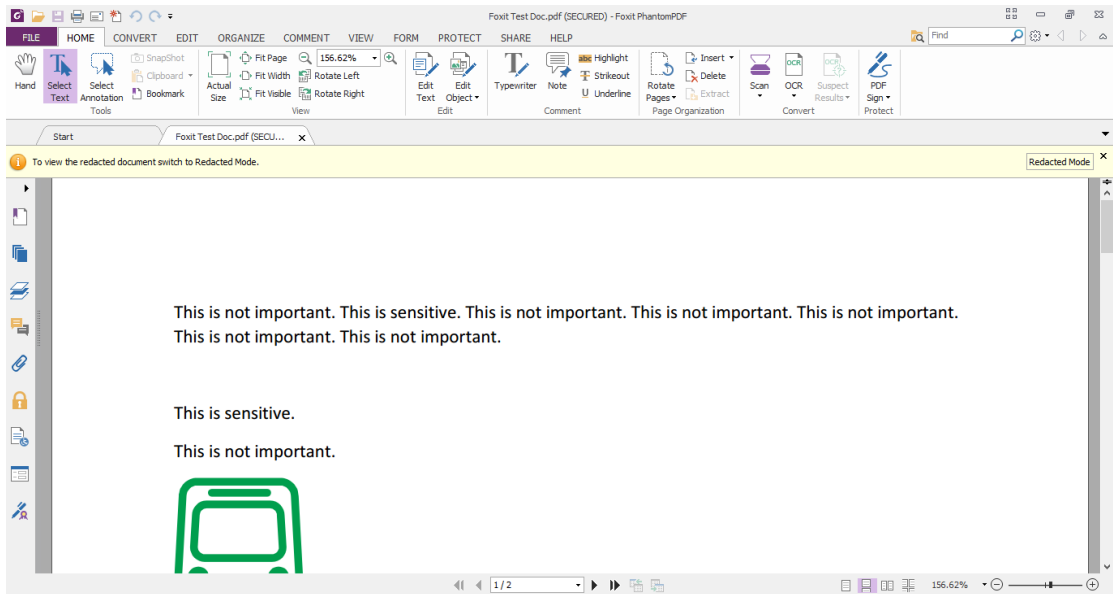
7) Here's the File explorer preview screen.

NOTE:

- Only owner can switch between the redacted mode to the full protected content mode.
- Authorized users are granted document access with permissions.
- Unauthorized users are able to see the redacted document.
- All text that is visible in the redacted document is searchable and the document can be printed.

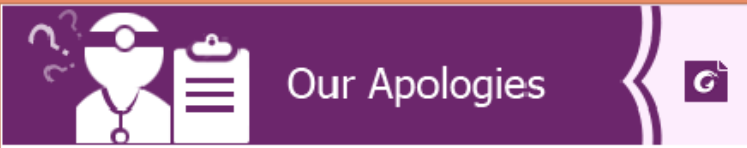## _How to communicate your issues/feedback:_

You can report any issues or feedback directly at this page - http://tickets.foxitsoftware.com/ticket-phantompdf-beta.php

Please select the issue type based on the type of problem you encountered:
- Bug: If you think the software is not acting as designed.
- Functional Issue: If you think the software is working but is not intuitive/user friendly or does not provide an effective workflow.
- Feature Request: If you would like to request a new feature.
- Crash: If the program stops responding or the system crashes.

Please note that we also have a crash reporter that may appear if the program crashes. If it does appear, please fill in your information and click "Send Crash Report" to notify us about the crash, as follows:

If you encounter a crash and the window does not appear, please submit a ticket and attach the crash log. It will be named crashlog.txt and can be found at the following location by default – please look in your PhantomPDF folder if you have installed it somewhere else:

For 64-bitprocessors-C:\Program Files (x86)\Foxit Software\Foxit PhantomPDF

For 32-bitprocessors-C:\Program Files\Foxit Software\Foxit PhantomPDF

Thank you for your time!

-Beta Test team @Foxit