



How to restrict files

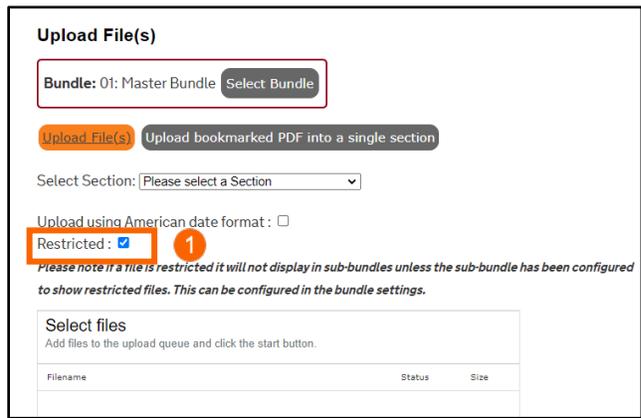
Any file can be uploaded as restricted or marked as restricted after upload. When a file is marked as restricted, it will not display in a sub-bundle unless the **Show Restricted Files** box is checked in the sub-bundle settings. Only users with access to add files to a case can mark files as restricted.

Restricted files in sub-bundles created from a stamp are always viewable. This setting cannot be changed.

If you attempt to Securely Share a bundle in which restricted documents are included, you will receive a popup warning message. Select OK if you are certain it is safe to share these files.

Mark files as restricted before upload

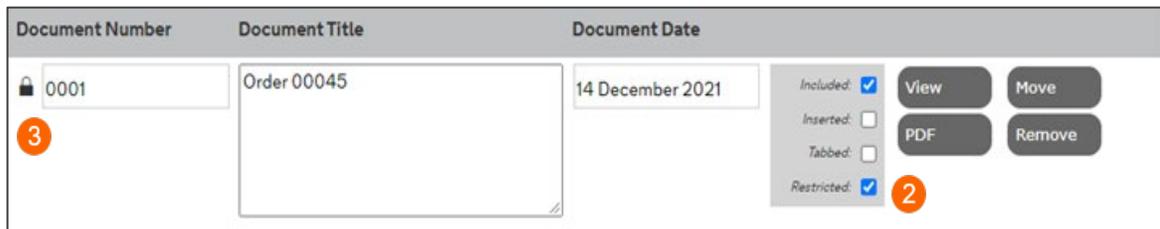
1. You can mark files as restricted when they are uploaded to the case by checking the **restricted** box on the **Upload** screen.



Mark files as restricted after upload.

To restrict a document after upload, go to the **Sections** tab on the **Case Home** page. Confirm that you are in the Master Bundle and select the **Update All Documents** button.

2. Choose the **Restricted** box next to the document you want to restrict.
3. A black padlock icon appears next to this file in the index, showing that it has been restricted. Wait until the padlock icon appears next to your document before leaving this screen. The padlock also appears next to the document in the review workspace.



Show restricted files in a bundle

If you would like to show restricted files in a bundle, go to the **Bundles** tab on the **Case Home** page. From here select the **Settings** button next to the bundle. Scroll all the way down the settings page and check the box next to **Show Restricted Files**.