

Workshare 3 Quick Reference – Metadata and PDF

What is Metadata?

The term **metadata** refers to a variety of types of information that can be hidden in a Microsoft Office document. Often, metadata can include confidential details about a document's history.



Metadata, such as the tracked changes and comment shown above, can include information that should not be sent outside the firm.

Using Workshare 3 Metadata Protection

Workshare 3 provides security against metadata problems by cleaning up to 25 different types of metadata (depending on your firm settings) in outgoing email attachments. Each time you send an email with an attachment outside the firm, a Workshare 3 dialog box allows you to clean metadata and safely send the document.

To Remove Metadata from an Email Attachment

1. Create an email message with an attachment that is addressed to a recipient outside the firm.
2. Click **Send**. A Workshare 3 dialog box is displayed.
3. Make selections in the **Metadata** area.

To do this...	Do this...
Clean track changes and/or comments as well as all other metadata types	Check the Track changes and/or Comments box and leave the Skip all metadata cleaning box unchecked.
Do not clean track changes or comments, but clean all other metadata types	Leave the Track changes and Comments boxes as well as the Skip all metadata cleaning box unchecked.
Do not clean any metadata in the document	Check the Skip all metadata cleaning box (not recommended).

4. Click **send now**. Workshare 3 cleans the document according to your selections. The cleaned file can be found in sent email.



Note: Workshare 3 cleans metadata from Word, Excel, and PowerPoint documents.

Sending PDF Files

Workshare 3 email integration also lets you convert documents to PDF “on the fly” in outgoing email attachments.

To Convert an Email Attachment to PDF

1. Create an email message with an attachment that is addressed to a recipient outside the firm.
2. Click **Send**. A Workshare 3 dialog box is displayed.
3. In the **Convert to PDF** area, select **Yes**.
4. Select security options, if any, in the **PDF Security** area.
5. Click the **send now** button. The PDF file can be found in your sent email.



Caution: If the Word document contains tracked changes or comments, these may be displayed in the PDF file, too. It is recommended that you select to remove this metadata when you convert to PDF.

To Convert to PDF and Send from Word

Workshare also gives you the ability to start from an open Word document and convert a document to PDF and send it.



Tip: This method can be used to send a PDF to another user within the firm.

1. With the document open in Word, click the **Send** icon from the Workshare panel home page.
2. In the **Select File Type** area, click **PDF**.

Select File Type

Select the format in which you want to send this document:

- PDF Word Document

3. If the document contains tracked changes or comments, check the boxes to clean these items.

Metadata

Please select the metadata you would like to clean:

- Track Changes (11)
 Comments (1)

4. Select security options, if any, in the **PDF Security** area.
5. Click the **send now** button. Workshare creates the PDF file and attaches it to a blank email.
6. Prepare the email as usual, and send. The PDF file can be found in your sent email.



Tip: To convert additional documents to PDF for sending, click the **Browse** link under **Additional Documents** and select an additional document. Click the **options** button next to the item, and click **PDF**.

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Using Advanced Metadata Tools

Although Workshare 3 metadata protection is activated every time you send an email attachment externally, Workshare 3 also contains advanced tools available from within Word for analyzing and cleaning metadata within a Word document.

To Check a Document for Metadata

1. Open the document you want to check for metadata.
2. Click the **Metadata** icon in the home page of the Workshare Panel.

or

Select **Workshare/Analyze Document**.

The Analyze document page is displayed with information about any Comments or Track Changes in the document.

3. Select either Comments or Tracked Changes and click to expand the list and display all items for that list.

Analyze Document

Use the list below to explore comments, footnotes and track changes in the document.

You may also wish to see a more [comprehensive report](#).



Comments (1)



Please check with Janet on language used in Marion Brook's agreement regarding third party.

remove

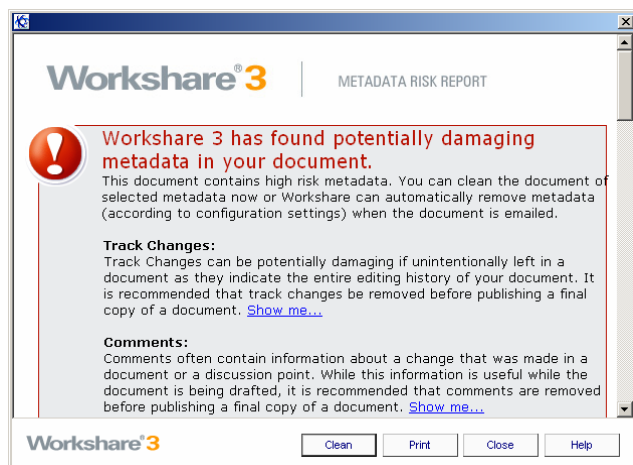


TrackChanges (11)



Tip: Use the action buttons for any individual metadata item you want to act on. A **remove** button is displayed for each comment, and **accept** and **reject** buttons for each tracked change.

4. Click the [comprehensive report](#) link to view all metadata in the document. The Metadata Risk Report is displayed.

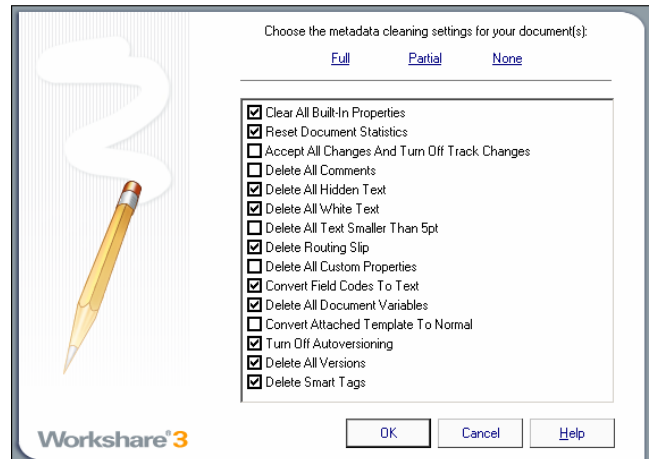


5. Scroll down to view the entire Metadata Risk Report.

To Clean the Working Copy of a Document

Running metadata cleaning from the Metadata Risk Report allows you to clean metadata from any open Word document.

1. With the Metadata Risk Report displayed, click the **Clean** button.



2. Select the cleaning level: [Full](#), [Partial](#), or [None](#), or select individual actions by marking or clearing the checkboxes in the actions area.
3. Click **OK**.
4. When the report finishes running, click the **Close** button.
5. Click **Save** to keep the cleaned version of the document.

-END-