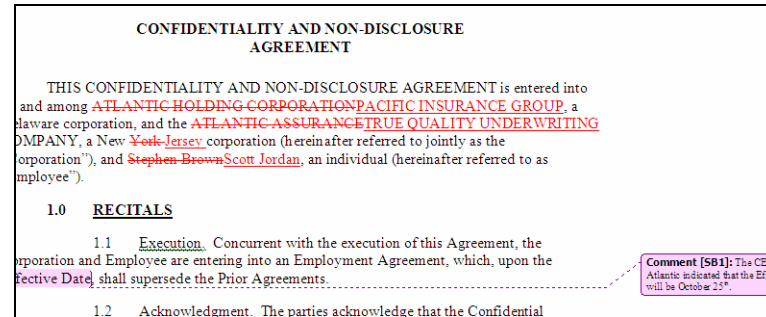


## What is Metadata?

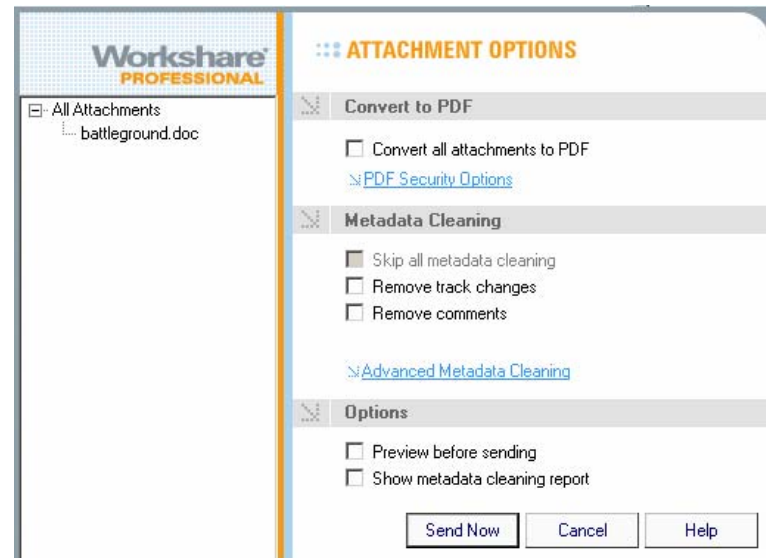
The term **metadata** refers to a variety of types of information that can be hidden in a Microsoft Office document. Often, metadata can include confidential details about a document's history.



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

## Using Workshare Professional Metadata Protection

Workshare Professional 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 Professional 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 Professional dialog box is displayed.
3. Make selections in the **Metadata Cleaning** area.

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

4. Click **Send Now**. Workshare Professional cleans the document according to your selections, and sends it. The cleaned file can be found in sent email.



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

## Sending PDF Files

Workshare Professional 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 Professional dialog box is displayed.
3. In the **Convert to PDF** area, check the **Convert all attachments to PDF** box.
4. Click the [PDF Security Options](#) link to change your security options.
5. Click the **Send Now** button. The PDF file is sent and 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 hidden data 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 your office.

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:

Word Document



[PDF Security Options](#)

3. Select security options, if any, by clicking the [PDF Security Options](#) link.
4. If the document contains tracked changes or comments, check the boxes in the **Remove Hidden Data** area to clean these items.

### REMOVE HIDDEN DATA

Please select the hidden data you would like to clean:

Track Changes (4)

Comments (2)

5. Click the **Create Email** button. Workshare Professional 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 **Attach Additional Documents** and select an additional document. Click the **Options** button next to the item, and click **PDF**.

## Using Advanced Metadata Tools

Although Workshare Professional metadata protection is activated every time you send an email attachment externally, Workshare Professional 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 **Hidden Data** icon in the home page of the Workshare Panel.
- or

Select **Workshare/Show Hidden Data**.

The Hidden Data page is displayed with information about any metadata in the document. This is displayed as High Risk, Medium Risk and Low Risk.

**HIDDEN DATA**

**HIGH RISK METADATA**

This document contains high risk metadata  
[Click here](#) to remove

- 3 Hidden Track Changes
- 1 Comment

**MEDIUM RISK METADATA**

This document contains medium risk metadata  
[Click here](#) to remove

- 2 Fields
- 2 Document Reviewers

**LOW RISK METADATA**

This document contains normal metadata  
[Click here](#) to remove

- 6 Document Statistics
- 2 Built-In Properties
- 1 Attached Template

Clean Report

3. Click the button to expand any of the lists to display all items for that list.
4. (Optional) Click the button to create a Document Risk Report displaying all metadata in the document.

### To Clean the Working Copy of a Document

Running metadata cleaning from the Hidden Data page allows you to clean metadata from any open Word document.

1. With the Hidden Data page displayed, click the **Clean** button. The Advanced Options dialog opens.

**ADVANCED OPTIONS**

Choose the metadata cleaning settings for your document(s):

[Full](#) [Partial](#) [None](#)

- Clear All Built-In Properties
- Accept All Changes And Turn Off Track Changes
- Delete All Comments
- Delete All Hidden Text
- Delete All White Text
- Delete All Text Smaller Than 5pt
- Delete Routing Slip
- Delete All Custom Properties
- Convert Field Codes To Text
- Delete All Document Variables
- Convert Attached Template To Normal
- Turn Off Autoversioning
- Delete All Versions
- Delete Smart Tags

OK Cancel Help

2. Select the cleaning level: [Full](#), [Partial](#), or [None](#), or select individual actions by marking or clearing the appropriate check boxes.



**Note:** You may also clean all the Hidden Data in each of the High Risk, Medium Risk and/or Low Risk areas by clicking the [Click here](#) link.

3. Click **OK**.
4. When cleaning finishes running, the Hidden Data page refreshes and displays any remaining hidden data.

# WORKSHARE PROFESSIONAL

## HIDDEN DATA AND PDF

Find help on these topics:

WHAT IS METADATA?

USING WORKSHARE PROFESSIONAL METADATA PROTECTION

To Remove Metadata from an Email Attachment

SENDING PDF FILES

To Convert an Email Attachment to PDF  
 To Convert to PDF and Send from Word

USING ADVANCED METADATA TOOLS

To Check a Document for Metadata  
 To Clean the Working Copy of a Document