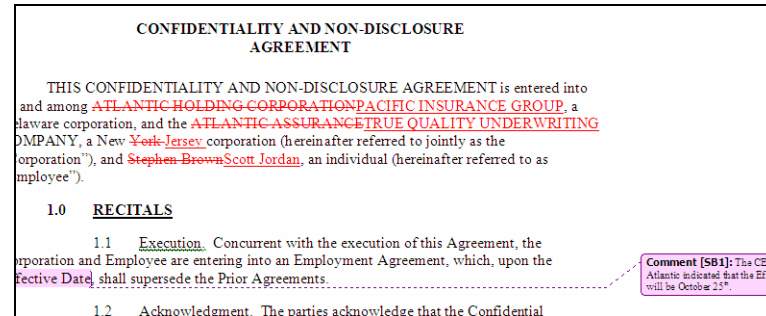


What is Content Risk?

The term **Content Risk** refers to a variety of types of information that can be contained in Microsoft Word, Excel, or PowerPoint documents. Content Risk includes hidden data, such as tracked changes and comments, and visible content in documents that, if exposed, could violate your firm's privacy, intellectual property, or financial disclosure policies. Examples of Content Risk include social security numbers, company financials and employee and customer information.

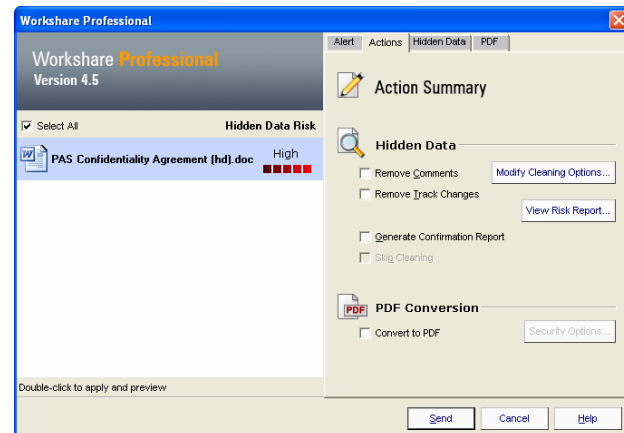
Workshare Professional alerts users to the presence of Content Risk, whether or not the information is hidden or visible, and can also remove hidden data before the document leaves the firm via email.



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

Revealing and Removing Content Risk

Each time you send an email with an attachment outside the firm, a Workshare Professional dialog box allows you to remove hidden data and safely send the document. You are also alerted to any content that might be in violation your firm's policies.



To Remove Hidden Data 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. On the **Actions** tab, make selections in the **Hidden Data** area.

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

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

Alerting on Content Risk

Workshare Professional alerts you if the document you are sending outside the firm contains Content Risk that, while not hidden, could be compromising. Examples of this type of content include social security numbers, credit card numbers and profanity.

Your firm's IT administrators can customize this functionality to recognize any words or phrases that might be compromising.

To View Content Risk

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. If the document contains high risk content, the **Alert** tab of the Workshare Professional dialog box is displayed, notifying you of the possible policy violation.



4. Cancel the Alert, remove the document from the email message, and remove or replace high risk content.
or

Click the **Next** button to display all tabs on the Workshare Professional dialog box. The Content Risk is not removed.

Caution: The Content Risk Alert *does not* automatically remove potential violations (social security numbers, etc.) when the document is sent. To remove this type of Content Risk, manually make edits in the document before sending it.

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. On the **Actions** tab, in the **PDF** area, check the **Convert to PDF** box.
4. Switch to the **PDF** tab to change your security options.
5. Click the **Send** button. The PDF file is sent and can be found in your sent email folder.

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 content risk when you convert to PDF.

To Convert a Word Document to PDF and Send



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 (14)

Comments (3)

5. Click the **Create Email** button. Workshare Professional creates the PDF file and attaches it to a blank email message.
6. Prepare the email message as usual, and send. The PDF file can be found in your sent email folder.



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 Tools

Workshare Professional contains advanced tools available from within Word for analyzing and cleaning content risk within a Word document.

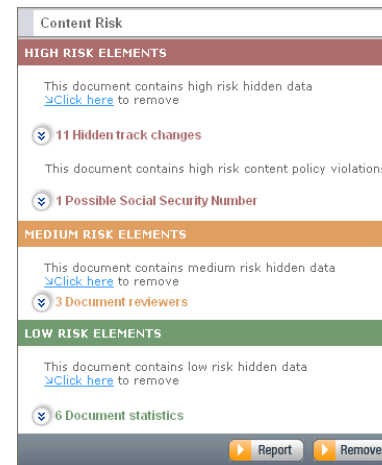
To Check a Document for Content Risk

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

or

Select **Workshare/Show Content Risk**.

The Content Risk page is displayed with information about any content risk in the document. This is displayed as *High Risk Elements*, *Medium Risk Elements* and *Low Risk Elements*.



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

To Clean the Working Copy of a Word Document

1. With the Content Risk page displayed, click the **Remove** button. The Advanced Options dialog opens.
2. Select the cleaning level (**High Risk Elements**, **Medium Risk Elements**, or **Low Risk Elements**) or you may select individual actions by marking or clearing the applicable check boxes.



Note: Within the Content Risk page, you may also clean all the content risk 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 Content Risk page refreshes and displays any remaining content risk.

WORKSHARE PROFESSIONAL

CONTENT RISK AND PDF

Find help on these topics:

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To View Content Risk

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