

Workshare Protect 4.5 – Best Practice Policies

Introduction

This document describes the policy management and configuration of Workshare Protect and suggests best practice recommendations on how to create policies for user profiles across the Enterprise. It looks at four key areas of analysis when creating Workshare Protect security policies:

1. User Profiles
2. Email Settings
3. Content Policies
4. Hidden Data Policies

This document should be used only as a guide in the deployment of Workshare Protect.

User Profiles

When establishing content security policies for Workshare Protect, it is important to consider the role of users who distribute documents and content to gauge the risk based on their permissions and access to sensitive content. Workshare Protect ships out of the box with a default policy configuration but this isn't always suitable for different users and groups across the Enterprise. Therefore, individual policies should be created based on a user's profile.

Typical user profiles that are commonly seen across organizations can be described as follows:

Profile #1 Business Support Staff

User profiles who don't make key business decisions or are not accountable for these decisions

Profile #2 Manager/Supervisor/Normal Knowledge Worker

User profiles who occasionally make key business decisions but are not always accountable for these decisions

Profile #3 Senior Manager/Director/Advanced Knowledge Worker

User profiles who have some access to make key business decisions and are accountable for these decisions

Profile #4 Executives/Power User

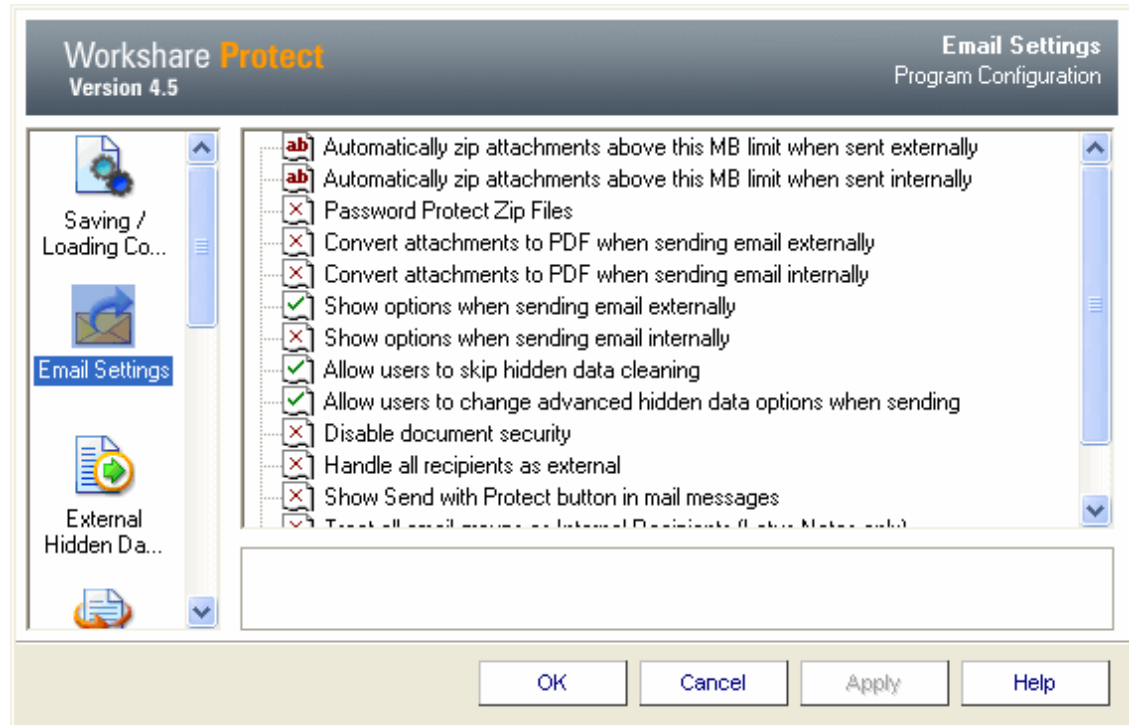
User profiles who are authorized to make sound business decisions and are accountable for these decisions

Workshare Protect policy configurations should be mapped to each user's profile by determining any risk associated with the profile. An example of a commonly used policy profile is set out below and is used for illustration only.

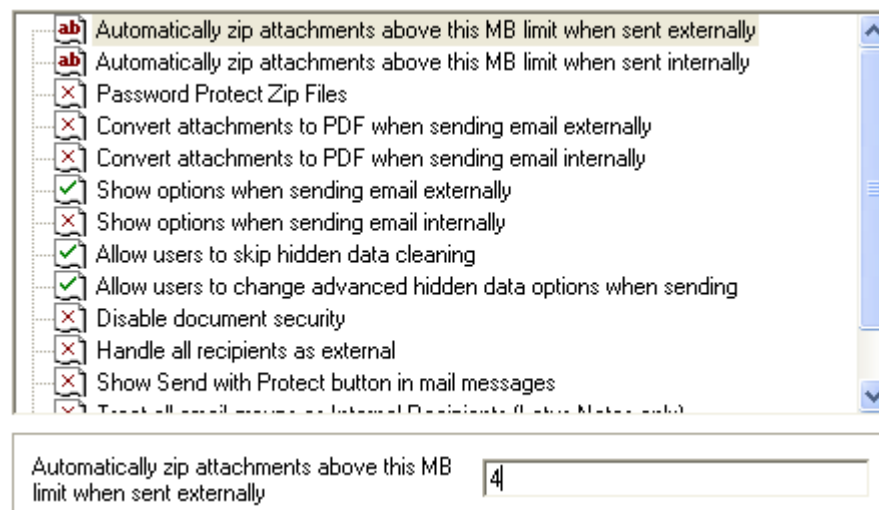
| | Profile #1 High Risk | Profile #2 Medium Risk | Profile #3 Medium-Low Risk | Profile #4 Low risk |
|----------------------------|---|--|--|--|
| Internal Recipients | Do not show options on send | Show options on send | Do not show options on send | Do not show options on send |
| | Do not show progress bar | Metadata: Clean all and allow override for all options EXCEPT: Comments, Track Changes and Hidden Text | Metadata: No cleaning | Metadata: No cleaning |
| | Metadata: Clean all | Content Filtering: Alerts on | Content Filtering: Alerts off | Content Filtering: Alerts off |
| | Content Filtering: Alerts on | No PDF conversion with override | Password protect policy configuration | Allow access to policy configuration |
| | No user override | Skip cleaning disabled with no override | | |
| | No PDF conversion | Password protect policy configuration | | |
| | Skip cleaning disabled with no override | | | |
| | Password protect policy configuration | | | |
| | Do not show options on send | Show options on send | Show options on send | Show options on send |
| | Do not show progress bar | Metadata: Clean all and allow override for all options EXCEPT: Comments, Track Changes and Hidden Text | Metadata: Clean all and allow override for all options | Metadata: Clean all and allow override for all options |
| External Recipients | Metadata: Clean all | Content Filtering: Alerts on | Content Filtering: Alerts on | Content Filtering: Alerts on |
| | Content Filtering: Alerts on | No user override | PDF conversion with override | PDF conversion with override |
| | No user override | PDF conversion no override | Skip cleaning disabled with no override | Skip cleaning enabled with override |
| | PDF conversion no override | Skip cleaning disabled with no override | Password protect policy configuration | Allow access to policy configuration |
| | Skip cleaning disabled with no override | Password protect policy configuration | | |
| | Password protect policy configuration | | | |
| | | | | |

Email Settings Policy

Email Settings enables you to configure policy on whether the user should be prompted before email attachments are cleaned of hidden data, as well as automatic zipping and PDF options.



The parameters are displayed in the middle area of the right pane. Selecting a parameter enables you to specify that parameter in the lower area of the right pane. For example:



The best practice Email Settings policies are described in the following table:

| Parameter | Description | Best Practice |
|---|---|---|
| Automatically zip attachments above this MB limit when sent externally | <p>This option enables you to specify the size limit for zipping attachments sent to external recipients. If this option is left blank, no zipping is done. If this option is set to 0, attachments are always zipped (unless they are already zipped). You can also set this value to a particular size, for example, 0.5. In this case zipping only occurs if attachments collectively are larger than 0.5MB. The default setting is blank, so automatic zipping does not occur.</p> <p>NOTE: This action is invoked when at least one of the attachments is in one of the following formats: DOC, RTF, XLS, DOT or PPT.</p> | <p>Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = OFF</p> |
| Automatically zip attachments above this MB limit when sent internally | <p>This option is similar to the above, except that it applies to attachments when all recipients are internal. The default setting is blank, so automatic zipping does not occur.</p> <p>NOTE: This action is invoked when at least one of the attachments is in one of the following formats: DOC, RTF, XLS, DOT or PPT.</p> | <p>Profile #1 = ON Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF</p> |
| Password Protect Zip Files | <p>When this setting is selected, users are prompted to enter a password whenever attachments are automatically zipped. This option is used in conjunction with the automatic zip options.</p> <p>When this setting is not selected, zip files are not password-protected.</p> | <p>Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF</p> |
| Convert attachments to PDF when sending email externally | <p>When this setting is selected, and Show options when sending email externally is disabled, Microsoft Office documents attached to the email are automatically converted to PDFs when the email is sent externally.</p> <p>If Show options when sending email externally is enabled, the user can select at the time of the send if the documents should be converted or not, and overwrite the default option selected by this setting.</p> | <p>Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = OFF</p> |
| Convert attachments to PDF when sending email internally | <p>When this setting is selected, and Show options when sending email internally is disabled, Microsoft Office documents attached to the email are automatically converted to PDFs when the email is sent internally.</p> <p>If Show options when sending email internally is enabled, the user can select at the time of the send if the documents should be converted or not, and overwrite the default option selected by this setting.</p> | <p>Profile #1 = OFF Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF</p> |

| Parameter | Description | Best Practice |
|--|--|--|
| Show options when sending email externally | <p>When this setting is selected, users will see the dialog box with options to convert to PDF or remove hidden data when they send documents to external users.</p> <p>When this setting is not selected, the user does not see any options, and the email is processed according to the hidden data cleaning and PDF options specified in the configuration settings.</p> <p>By default this option is selected, so the dialog box is displayed when emailing to external users.</p> | <p>Profile #1 = OFF</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |
| Show options when sending email internally | <p>When this setting is selected, users will see the dialog box with options to convert to PDF or remove hidden data when they send documents to internal users.</p> <p>When this setting is not selected, the user does not see any options, and the email is processed according to the hidden data cleaning and PDF options specified in the configuration.</p> <p>By default this option is not selected, so the dialog box is not displayed when emailing to internal users.</p> | <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> |
| Show Content Alert when sending mail externally | <p>When this setting is selected, users will be alerted when they attempt to send documents externally that contain high, medium or low levels of hidden data. This parameter is selected by default.</p> | <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |
| Show Content Alert when sending mail internally | <p>When this setting is selected, users will be alerted when they attempt to send documents internally that contain high, medium or low levels of hidden data. This parameter is not selected by default.</p> | <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> |
| Allow users to skip hidden data cleaning | <p>When this setting is selected, users are allowed to bypass all hidden data cleaning specified in the configuration for a particular email.</p> <p>If this option is enabled, a “Skip Cleaning” checkbox is displayed in the dialog box that appears when users send an email.</p> <p>If this option is disabled, the “Skip Cleaning” checkbox is disabled and hidden data cleaning specified in the configuration is enforced.</p> | <p>Profile #1 = OFF</p> <p>Profile #2 = OFF</p> <p>Profile #3 = OFF</p> <p>Profile #4 = ON</p> |

| Parameter | Description | Best Practice |
|---|--|--|
| Allow users to change advanced hidden data options when sending | When this setting is selected, the “ Hidden Data ” tab is available in the dialog box displayed when sending an email. This option enables the user to specify exactly which hidden data types to remove from an attachment. | Profile #1 = OFF Profile #2 = OFF Profile #3 = ON Profile #4 = ON |
| Disable document security | When this setting is selected, email attachments and document restriction settings are not checked so users are not prompted to clean hidden data regardless of other settings. | Profile #1 = OFF Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF |
| Handle all recipients as external | When this setting is selected, internal recipients are no longer recognized. All recipients are regarded as external recipients and the same settings are applied for all recipients. | Profile #1 = OFF Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF |
| Show Send with Protect button in mail messages | When this setting is selected, a Workshare Protect button is included in the Standard toolbar of the email message window. When the user creates an email with an attachment, then clicks on the Send with Protect button, the <i>Attachment Options</i> dialog is displayed, providing the user with the options to convert to PDF and clean hidden data. <u>NOTE: This button does not appear when Microsoft Word is the selected email editor. To configure this button for Lotus Notes, please visit the Workshare Learning Centre for additional configuration information.</u> | Profile #1 = OFF Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF (optional ON if required) |
| Treat all email groups as Internal Recipients (Lotus Notes only) | When this setting is selected, Workshare Protect applies the internal settings to documents emailed to email groups. Both internal and external recipients within these groups will be treated as internal recipients. This setting is available for Lotus Notes only. <u>NOTE: When this setting is selected, all external recipients within an email group will be treated as internal recipients.</u> | Profile #1 = OFF Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF |

| Parameter | Description | Best Practice |
|---|---|---|
| Additional Internal Domains (Lotus Notes only) | <p>This setting allows you to specify the names of domains that you wish to treat as internal. All email addresses within the specified domain names will be treated as internal recipients. All email addresses from domains not on this list will be treated as external recipients.</p> <p>To specify a domain as internal, enter the name of the domain in the field supplied. If you want to specify more than one domain you can do so by separating each domain with a semicolon. This setting is available for Lotus Notes only and is case sensitive.</p> <hr/> <p>NOTE: The domain of each user is displayed in a specific domain field in the Lotus Notes address book.</p> | Customized for All Profiles |
| Suppress Progress Bars | <p>This setting allows you to suppress the progress bar that will appear when cleaning and sending an email. This progress bar appears after a number of seconds when the Show options when sending mail externally and Show options when sending mail internally settings are disabled. This setting is disabled by default.</p> | Profile #1 = ON Profile #2 = OFF Profile #3 = OFF Profile #4 = OFF |

Content Policies

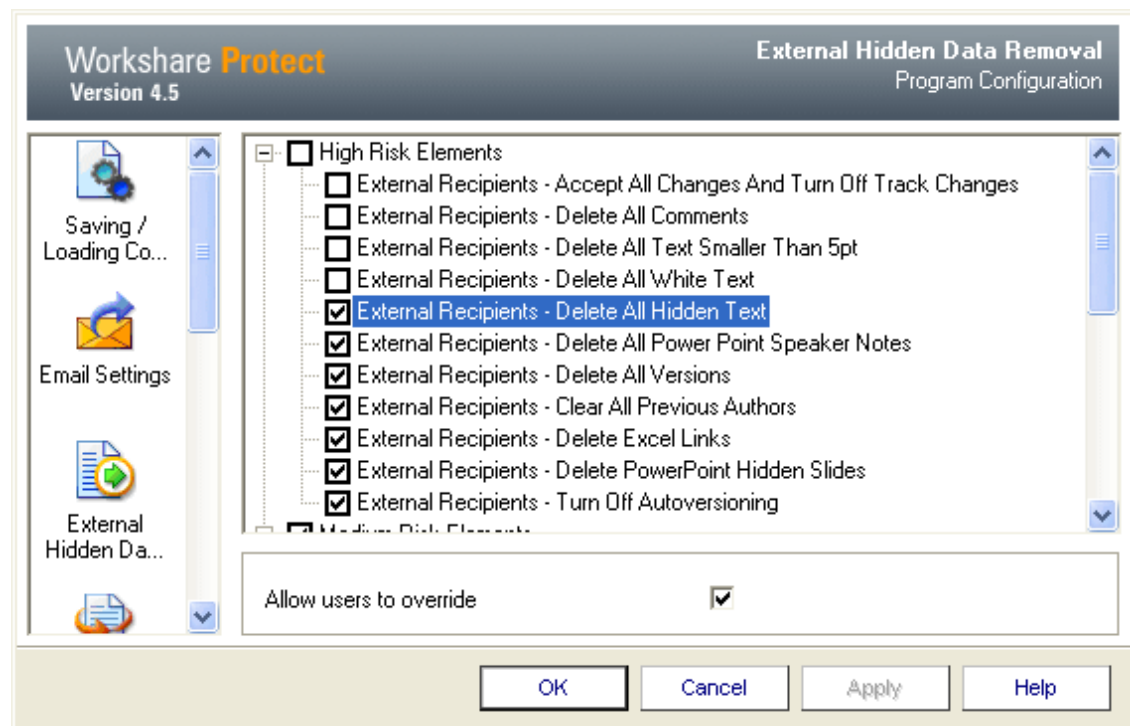
Workshare Protect ships with best practice policies for identifying content risk in documents by searching for pre-defined keywords and regular expressions in elements of a document's structure e.g. the words Confidential or For Internal Use Only in the header or footer of documents or credit card and social security numbers.

The content policies are extensible to include custom keywords and regular expressions that may have specific sensitivity to an organization i.e. document classification schemes or matter and account numbers. For more information on customizing Workshare Protect content policies please refer to TechNote: Policy Customization from the Workshare Protect Learning Center - <http://www.workshare.com/support>

Hidden Data Policies

The Internal Hidden Data Removal and External Hidden Data Removal policies enable you to specify which hidden data should be removed from email attachments. There are two Hidden Data Removal policies: External Hidden Data Removal that includes parameters for external recipients, and Internal Hidden Data Removal that includes parameters for internal recipients. The parameters in both policies are the same but one set applies to internal recipients and the other applying to external recipients. Different settings can be set for each. You may want to remove all hidden data when sending emails externally, but only remove track changes and hidden text when emailing internally.

You can also select whether to allow the user to override these settings. When you select a setting, a checkbox to **Allow users to override** will appear in the lower middle pane. If you want users to be able to override your settings, select this checkbox. Otherwise, the user will be unable to change the setting. This checkbox is selected by default, therefore, administrators must uncheck the checkbox to lock these settings.



The parameters are displayed in the right pane and are divided into High, Medium and Low risk hidden data. You select a parameter by selecting a checkbox to the left of the parameter. Selecting the checkbox to the left of, for example, High Risk Elements selects all the hidden data options in that category.

Workshare Protect ships with best practice High, Medium and Low risk elements but they can be customized to represent what elements are specifically sensitive to an organization. The risk ratings can be modified by editing each High, Medium or Low risk element in C:\Documents and Settings\All Users\Application Data\Workshare\Workshare\metadatasecurityratings.xml. For more information on customizing the Hidden Data risk ratings, please refer to the Workshare Protect Admin Guide.

The best practice Hidden Data policies (both Internal and External) are described in the following table:

| Parameter | Description | Best Practice | |
|--|---|--|--|
| HIGH RISK | | | |
| Accept All Changes And Turn Off Track Changes | Microsoft Word and Excel. If selected, accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All Comments | Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All Text Smaller Than 5pt | Microsoft Word only. If selected, removes all text that has been formatted with a font size less than 5pt. Small text can be viewed in Microsoft Word by selecting Zoom from the <i>View</i> menu and specifying a percentage greater than 100%. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All White Text | Microsoft Word only. If selected, removes all text that has been formatted with a font color of white and has no background color. White text can be viewed in Microsoft Word by selecting Options from the <i>Tools</i> menu and selecting Blue background, white text in the General options section of the General tab. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All Hidden Text | Microsoft Word only. If selected, removes all text that has been formatted as hidden. Hidden text can be viewed in Microsoft Word by selecting Options from the <i>Tools</i> menu and selecting Hidden Text in the Formatting marks section of the View tab. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |

| Parameter | Description | Best Practice | |
|--|---|--|--|
| Delete All PowerPoint Speaker Notes | <p>Microsoft PowerPoint only. If selected, deletes all the text that appears on the Notes pages in a PowerPoint presentation.</p> <p>Speaker notes are usually used by speakers to remind them of points during a presentation. You may want to remove speaker notes before distributing a presentation, as they are not usually intended for others to read.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All Versions | <p>Microsoft Word only. If selected, removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document.</p> <p>Previous versions can be viewed in Microsoft Word by selecting Versions from the <i>File</i> menu.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Clear All Previous Authors | <p>Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations.</p> <p>This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete Excel Links | <p>Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links:</p> <ul style="list-style-type: none"> • Link to a cell in another Microsoft Excel document. • Named link to a named reference in another Microsoft Excel document. • Link to another document. • OLE link that inserts another document as an icon. • OLE link that inserts another document as text. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |

| Parameter | Description | Best Practice | |
|--|--|--|--|
| Delete PowerPoint Hidden Slides | Microsoft PowerPoint only. If selected, removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Turn Off Autoversioning | Microsoft Word only. If selected, turns off the flag to automatically save a new version of the document every time the document is closed. Versions can still be saved manually. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| MEDIUM RISK | | | |
| Delete All Custom Properties | <p>Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document.</p> <hr/> <p>NOTE: You can prevent certain custom properties from being cleaned, for example, DMS Doc ID Properties, by specifying them in the Hidden Data Exclusions page. Refer to Hidden Data Exclusions, page 15.</p> <hr/> <p>Custom properties can be viewed in Microsoft Word by selecting Properties from the <i>File</i> menu and then selecting the Custom tab.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete All Document Variables | <p>Microsoft Word only. If selected, deletes all document variables.</p> <p>Document variables are values stored in Microsoft Word documents that are used by either field codes or macros to store various values. These variables may contain confidential information like company names, or file locations. Even if field codes and macros are removed, the variables used may remain in the document.</p> <p>To view variables, open the Visual Basic Editor from Microsoft Word (Alt + F11).</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |

| Parameter | Description | Best Practice | |
|-------------------------------------|---|--|--|
| Delete All Macros | <p>Microsoft Word only. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.</p> <p>Macros can be viewed in Microsoft Word by selecting Macro and then Macros from the <i>Tools</i> menu.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete Routing Slip | <p>Microsoft Word and Excel. If selected, removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information such as, recipients, subject and introduction, which are used when sending to a mail recipient.</p> <p>Routing Slip entries can be viewed in Microsoft Word by selecting Send To and then Routing Recipient from the <i>File</i> menu. Envelope information can be viewed in Microsoft Word by selecting Send To and then Mail Recipient from the <i>File</i> menu.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Clear All Document Reviewers | <p>Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed.</p> <p>NOTE: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| LOW RISK | | | |
| Delete Footnotes | <p>Microsoft Word only. If selected, removes any footnotes or endnotes included in the document.</p> | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |

| Parameter | Description | Best Practice | |
|--|---|---|---|
| Convert Field Codes To Text | <p>Microsoft Word, Excel and PowerPoint. If selected, converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index.</p> <p>This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed.</p> <hr/> <p>NOTE: You can prevent certain field codes from being cleaned, for example, table of Contents or page numbers, by specifying them in the Hidden Data Exclusions page. Refer to Hidden Data Exclusions, page 15.</p> <hr/> <p>Field codes can be viewed in Microsoft Word by selecting Options from the <i>Tools</i> menu and selecting Field Codes in the Show section of the View tab.</p> <p>For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.</p> | <p>Internal</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> | <p>External</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |
| Reset Document Statistics | <p>Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates.</p> <p>Statistics and file dates can be viewed in Microsoft Word by selecting Properties from the <i>File</i> menu and then selecting the Statistics tab.</p> | <p>Internal</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> | <p>External</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |
| Clear All Built-In Properties | <p>Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties - text, date and number.</p> <p>Built-in properties can be viewed in Microsoft Word, Excel and PowerPoint by selecting Properties from the <i>File</i> menu and then selecting the Summary tab.</p> | <p>Internal</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> | <p>External</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |
| Delete All Excel and PowerPoint Headers | <p>Microsoft Excel and PowerPoint. If selected, removes any headers included in the document.</p> | <p>Internal</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = OFF</p> <p>Profile #4 = OFF</p> | <p>External</p> <p>Profile #1 = ON</p> <p>Profile #2 = ON</p> <p>Profile #3 = ON</p> <p>Profile #4 = ON</p> |

| Parameter | Description | Best Practice | |
|--|--|--|--|
| Delete All Excel and PowerPoint Footers | Microsoft Excel and PowerPoint. If selected, removes any footers included in the document. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Delete Smart Tags | Microsoft Word only. If selected, removes smart tags from Microsoft Word documents. Smart tags are indicated in Microsoft Word by purple dotted lines underneath the words. Smart tags link functionality to special types of content, such as dates, names or addresses. For example, companies may have custom smart tags that provide a person's telephone number whenever their name is typed. Smart tags may be recreated automatically by Microsoft Word when a document is reopened, if the smart tag is available. Smart tags only exist in Microsoft Office XP and later. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |
| Convert Attached Template To Normal | Microsoft Word only. If selected, converts the attached template to normal.dot. This does not affect the formatting of your document. The attached template can be viewed in Microsoft Word by selecting Templates and Add-Ins from the <i>Tools</i> menu. | Internal Profile #1 = ON Profile #2 = ON Profile #3 = OFF Profile #4 = OFF | External Profile #1 = ON Profile #2 = ON Profile #3 = ON Profile #4 = ON |

Hidden Data Exclusions

The Hidden Data Exclusions policy includes parameters that enable you to exclude certain types of hidden data from being removed when documents are cleaned. The types of hidden data that can be excluded from cleaning are custom properties and field codes. When cleaning, the user can still select to clean custom properties and all custom properties or field codes will be cleaned, except for the ones explicitly excluded here.

It is important that any custom field codes used in an organization are reviewed for the sensitivity of information they may reveal. Based on this analysis, any field codes deemed NOT to be a security risk can be excluded.

It is recommended that the Workshare Protect defaults for Hidden Data exclusions are suitable for most deployments.