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ALL ABOUT METADATA

WHAT IS METADATA?

Metadata is defined as "data about data". As it relates to your business, it can be best described as information embedded in computer files, and may include document histories, comments, prior edits, and summaries. This information in itself is not a program deficiency or bug. Quite the contrary: many document management systems rely on this information to function. The danger inherent in metadata is that its presence is not always apparent. When you send a document in an e-mail or on a disk, you may be saying more than you intended. Edit histories can be particularly perilous. What if opposing counsel were able to uncover a reference to a higher settlement offer in an earlier draft of your letter?

In Microsoft Word, metadata can include the generating template, a document summary, keywords, comments, edit history, last edit time, document path, last ten authors, and version history.

Though the issue of metadata is more pronounced in Word, it is an issue in WordPerfect, too. Metadata in WordPerfect can include document comments, revision history, hidden text, and edit history.

Most people do not use document summaries, comments or hidden text, but document revisions and edit history are almost always accessible to expert Word users. Excel and Access have similar issues with metadata.

For a detailed article on metadata, see the February/March issue of Law Office Computing magazine, volume 14 issue 1.

HOW DO I PROTECT MYSELF?

The best protection against the unintentional release of metadata is to always convert a file to PDF and never e-mail a file in its native format. Though PDF files have can have metadata, too, the information is very limited and would not be useful to a snooping recipient.

If you must send a document out in its native format (Word, WordPerfect, Excel), then you must either use a third party product such as iScrub from iOfficeSystem, BEC's LegalBar, Metadata Assistant from Payne Consulting, or Workshare Metawall. Microsoft has recently released a free metadata removal tool for Microsoft Office XP and 2003. Another free product is Document Scrubber.

An alternative approach is to configure your applications to minimize the creation of metadata. This can reduce the type of data which is hidden in your documents, but may also limit the usefulness of your program too.

Microsoft has recognized the problem with metadata and provides an excellent online article regarding how to manage metadata at:

<http://office.microsoft.com/en-us/assistance/HA011400341033.aspx>

Again, the best solution is to only share documents in native format with persons you trust. As a general rule, documents should only be sent as attachments in PDF format. If you use Word and do not have the full version of Acrobat on your PC, a free utility called PDF995.com can create PDF files from any Windows application.