



Workshare 9

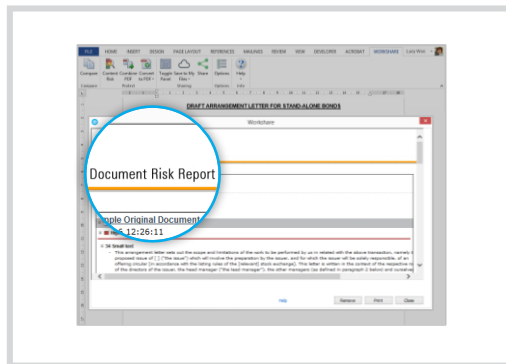
File & Metadata Security

Getting Started Guide

Work with peace of mind

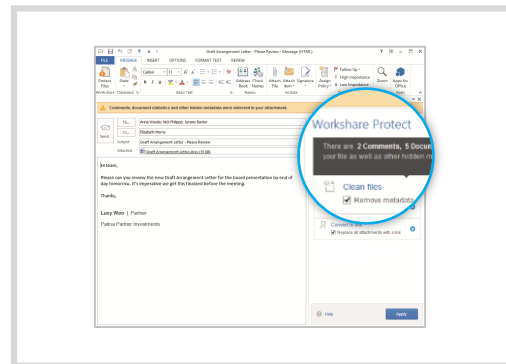
Clean sensitive, hidden data from your documents as a natural part of your workflow.

While you work



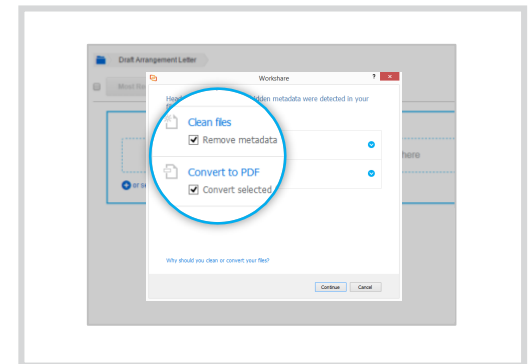
Remove sensitive data from files while you're working in Word, PowerPoint or Excel.

As you email



Clean your email attachments in Outlook so you only share the information you intended.

Before you share



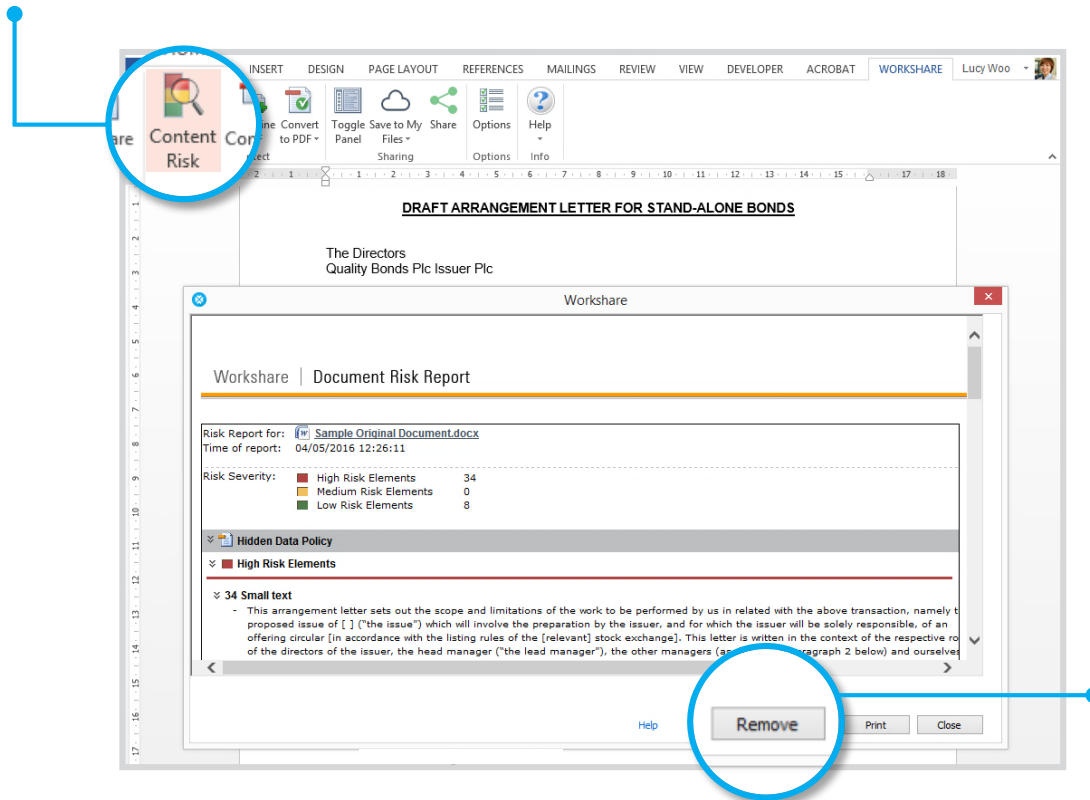
Invite others to share your files on Workshare, fast and risk-free.

Get started...

While you work Clean from Word, PowerPoint or Excel

While you're working on your document, you can use **Content Risk** in the **Workshare** tab to see which metadata is in it. You can remove the metadata you want to keep private.

To see what metadata is in your document, first select the **Workshare** tab, then click **Content Risk**.

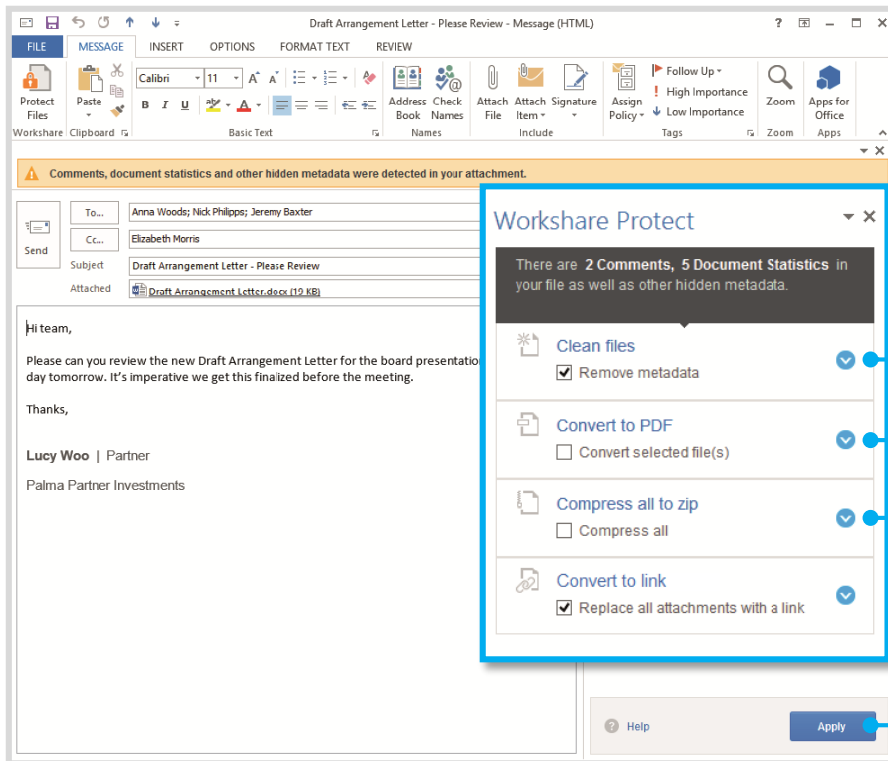


To clean your document, click **Remove**. You'll be asked to specify which metadata you'd like to clean before it's removed.

As you email

Secure your email attachments

When you attach a file to a new email in Outlook, Workshare automatically scans it for sensitive data. If it's found, you'll have the option to remove it using the Interactive Protect panel.



To clean your files, select **Remove metadata**. You can expand the option to specify which metadata is removed.

For extra protection, you can also convert the files to PDF and compress them to a ZIP.

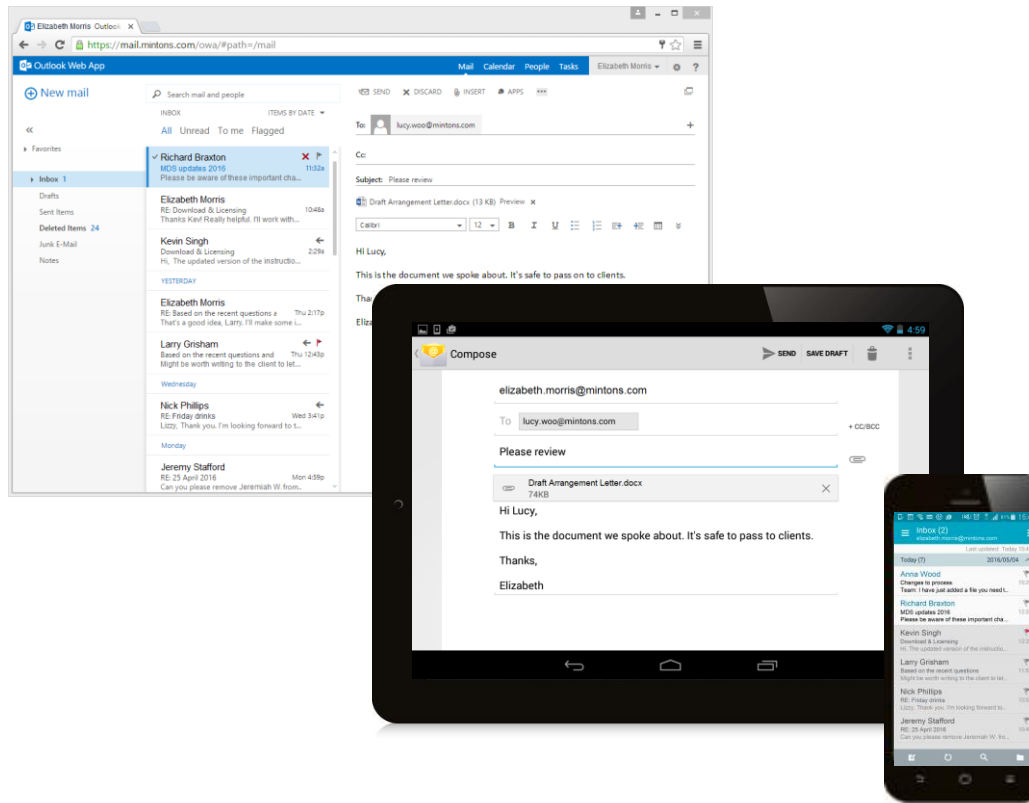
Apply your changes when you're ready.

i You also have the option to **Convert to link**, which enables you to securely transfer your files – including files that are too large for email.

As you email

Email secure attachments, wherever you are

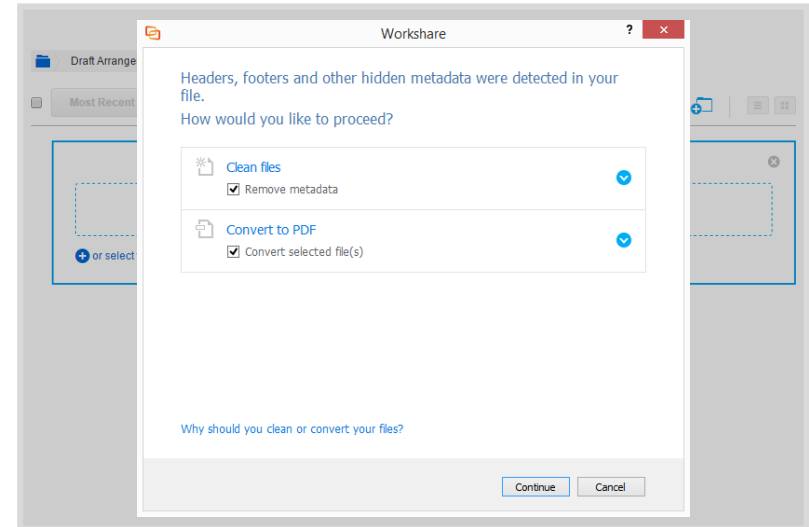
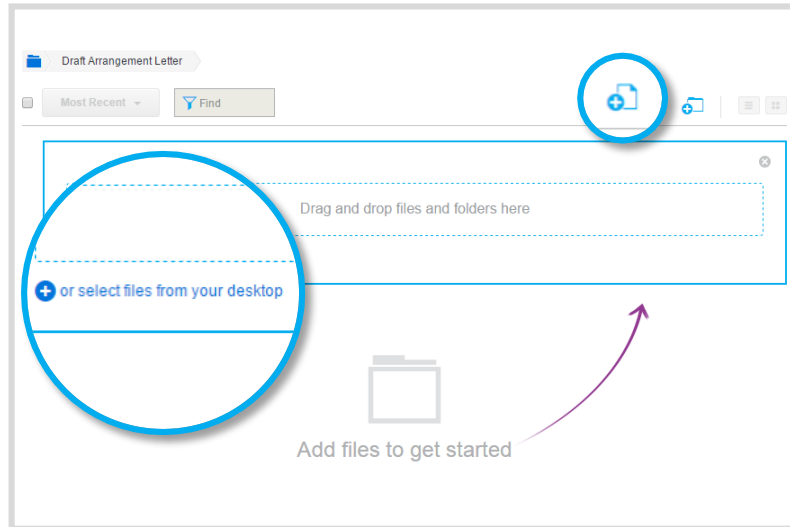
When you email files from your tablet or mobile or via webmail, they may be cleaned automatically. Your administrator defines what kind of email attachments are cleaned and what information will be cleaned from them.



Before you share

Clean and convert the documents you're adding to Workshare

You can clean your documents and convert them to PDF from the Workshare desktop app.



Open the Workshare desktop app by double-clicking the icon on your desktop. Go to **Folders** or **Groups**.

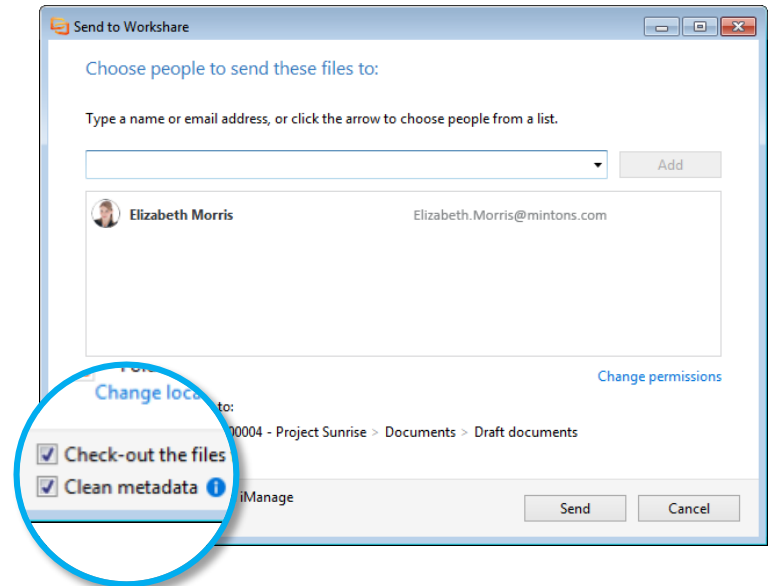
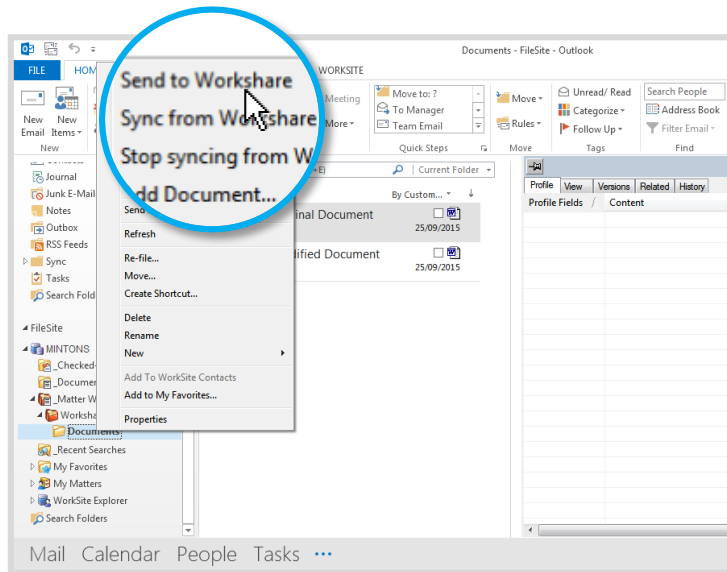
Add a new file by first clicking the new file icon, then clicking **or select files from your desktop**.

Workshare automatically scans your file for sensitive data, and if it's found you have the option to remove it. If your document is not a PDF, you have the option to convert it to a PDF. Expand either option by clicking the arrow next to it.

To apply the changes click **Continue**.

Before you share Clean documents from your DMS

When you're sending documents from iManage to Workshare, you can remove the sensitive data before you share them.



In iManage, right-click a file or folder and select **Send to Workshare**.

To share your files, enter a name or email address in the field provided and click **Add**. To keep your files private, leave this field blank.

Select **Clean metadata**.

When you're ready to go, click **Send**.