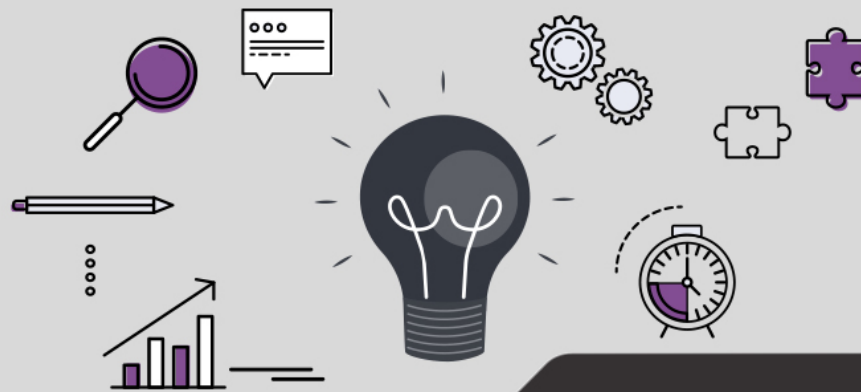


How a top firm uses metadata cleaning on the server as part of its data breach prevention strategy



Managing the metadata risk

Improper metadata management can cause data leaks that may breach compliance with regulations such as the California Consumer Privacy Act (CCPA) and the General Data Protection Regulation (GDPR).

Law firms are aware of the risks of metadata. The CIO for nearly 30 years at one North American firm explained that “most of the flighty metadata” is removed from documents sent outside its network.

“The metadata we scrub from files is the information that indicates where it was originally stored and so on. It’s information that isn’t associated with the meaningfulness of the document.” This information, if leaked, could include personal or highly confidential information and may constitute a data breach.

Desktop metadata scrubbers have been on the market for years. Still, more organizations are looking to help users manage metadata when working from mobile devices like smartphones, tablets, and iPads. Over 500 attorneys at this firm use iPads, which aren’t covered by a desktop-based approach to metadata management.

What is server-based metadata management?

A [server-based metadata scrubber](#) can protect mobile users by automatically cleaning email attachments according to pre-established policies. Some server-based email cleaning solutions can cause bottlenecks and email shutdowns.

“We found there were a lot of technical hurdles with the server we used previously,” the CIO told us. “It would stall anytime it found a Word document that was difficult to process. This halted all other mail processing because nothing could be sent through the server.”

This experience led the firm to [cleanDocs](#), since the server application integrates with Microsoft Exchange Server directly, rather than through separate and additional relay servers. Exchange manages the email delivery process and uses its own methods for dealing with problematic emails.



Legal

cleanDocs

Metadata

Learn about:

Helping staff work securely on mobile devices

Preventing accidental data breaches by managing document metadata

Using a desktop-server hybrid approach to metadata management

Supporting efficiency with time-saving features like convert to PDF or ZIP on send

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A hybrid desktop-server approach to metadata management

cleanDocs Desktop and Server are designed to work together. cleanDocs Desktop manages documents and email attachments at the desktop level. At the same time, cleanDocs Server only scrubs documents that originate from mobile devices, Outlook Web Access, or through another channel that may have skipped desktop cleaning.

If a document has already been cleaned on the desktop, it will be ignored by cleanDocs Server and sent immediately.

This firm uses cleanDocs Server and cleanDocs Desktop together as a best practice approach to metadata management. “cleanDocs gives us dual functionality with regard to metadata management.”

“To meet the firm’s expectations and those of the end-user, we wanted an interactive desktop client to show what metadata can be scrubbed,” the CIO continued. “We wanted to give our attorneys the tools and let them make intelligent choices about whether metadata should be removed or not.”

cleanDocs Desktop prompts users to clean or skip different types of metadata, including Track Changes, comments, author properties, and embedded objects, from email attachments. They can also action time-saving tasks like converting to PDF or ZIP files.

When working from an iPad, the same risky metadata is managed silently by cleanDocs Server. “cleanDocs Server is something the user doesn’t see because it operates purely in the background,” explained the CIO.

Custom policies are used at the firm to power efficiency. cleanDocs administrators can designate unique addresses that override the default behavior. For example, by creating a skip@mycompany.com email address, users can include it in their recipient list, and their attachments won’t be cleaned.

PDF conversion on the go

Mobile users can action more than just metadata cleaning using cleanDocs Server. Administrators can create an address, such as pdf@mycompany.com. When a user forwards a Word document or other Office file type to that address, it will prompt cleanDocs Server to convert the documents to PDF.

“Our attorneys use the PDF conversion functionality in cleanDocs Server all the time. If they receive a Word document from a client, they can send it to the email address we created, and we return them a PDF file so they can annotate it on their iPad using the stylus.”

The CIO explained attorneys prefer this “because revising in Word 365 is not as easy. Mobile users just want to mark it up and forward it on to an associate or a word processing specialist to type it up.”

Summary

This North American firm takes a best-practice approach to metadata management. Using cleanDocs Desktop and Server together, the firm protects sensitive client data from accidental leaks. With cleanDocs, users have the tools they need to make smart security decisions on all devices. More than comprehensive metadata management, cleanDocs delivers efficiency by providing a range of time-saving workflows like automated PDF conversion.

