

Table of Contents

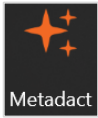
Introduction	3
Outlook: Email Send Button Features	3
Send email to external recipients -non-Track Changes attachments	3
Send email to external recipients - Track Changes attachments	3
Cleaning Profile Descriptions	4
Metadact Window Buttons.....	4
Alerts Window	5
Alerts Window – Turn off	5
Outlook: Metadact Litera Ribbon Features	6
Litera Ribbon – Access	6
Litera Ribbon - Customize a Profile	6
Litera Ribbon – Cleaning Options and Analyze Metadata	6
Litera Ribbon - Attachment Manager.....	7
Outlook: Clean Attachments in Received Email	8
Clean a received attachment from the main Outlook window	8
Open a received email to clean an attachment	8
Metadact Desktop Application	9
Metadact File Explorer, Word, Excel and PowerPoint	9
Email Attachment Scenarios	10
Send an email without cleaning the attachments	10
Send an email with Track Changes – Accept All Track Changes	10
Send an email with Track Changes – Keep Track Changes (Alerts window)	10
Send an email with Track Changes – Keep Track Changes and Retain Author information	10
Metadact Window: Send and Convert Attachments to PDF or PDF/A	11
Litera Ribbon: Convert to PDF, PDF/A, and Secure.....	12
Litera Ribbon Main View: Convert to PDF and Customize all profile settings for an Outlook session	12
Litera Ribbon: Modify a Profile.....	13
Litera Ribbon: Convert to PDF and Secure All Attachments.....	14
Litera Ribbon: Zip and Clean Attachments	14
Litera Ribbon Attachment Manager: Convert Attachments to PDF	15
Litera Ribbon Attachment Manager: Rename Attachments and Clean	15
Litera Ribbon Attachment Manager: Secure Specific Attachments	16
Litera Ribbon Attachment Manager: Reorder Attachments.....	17



Litera Ribbon Attachment Manager: Combine Attachments into a PDF and Manage Binder17
Litera Ribbon Attachment Manager: Zip and Clean Attachments18



Introduction



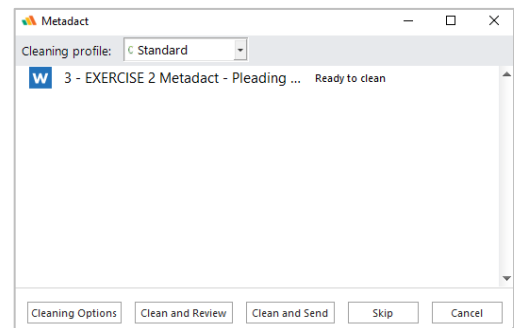
Metadact scrubs (cleans) metadata from email file attachments sent outside the firm and received email file attachments from external sources. Metadata is hidden information embedded in electronic files. Example Microsoft Word metadata: tracked changes, comments, small or white text, authors, edit times.

Outlook: Email Send Button Features

Send email to external recipients -non-Track Changes attachments



When sending email attachments to external recipients, one of two windows display dependent on whether the file is a Track Changes or a regular document.

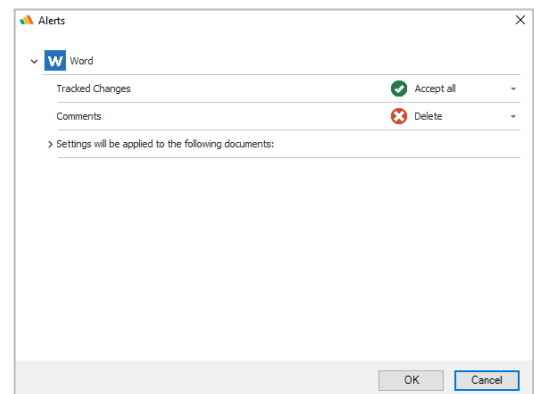
1. If the file is a non-Track Changes document, the **Metadact** window displays with the default **Standard** profile set.
2. Click either:
 - o **Cleaning Options** (modify settings or convert to PDF);
 - o **Clean and Review**
 - o **Clean and Send**
 - o **Skip**
 - o **Cancel** (close the Metadact window without sending)



Send email to external recipients - Track Changes attachments

If the file is a Track Changes document, the **Alerts** window displays.

1. In an email, click .
2. In the **Alerts** window:
 - o Click to  to change the default **Accept all** setting to either **Reject all** or **Leave**.
 - o Click **> Settings will be applied to the following documents:** if you have multiple Track Changes files that must have different metadata cleaning settings.
3. After clicking the **OK** button, the **Metadact** window displays. Click **Clean and Send**.

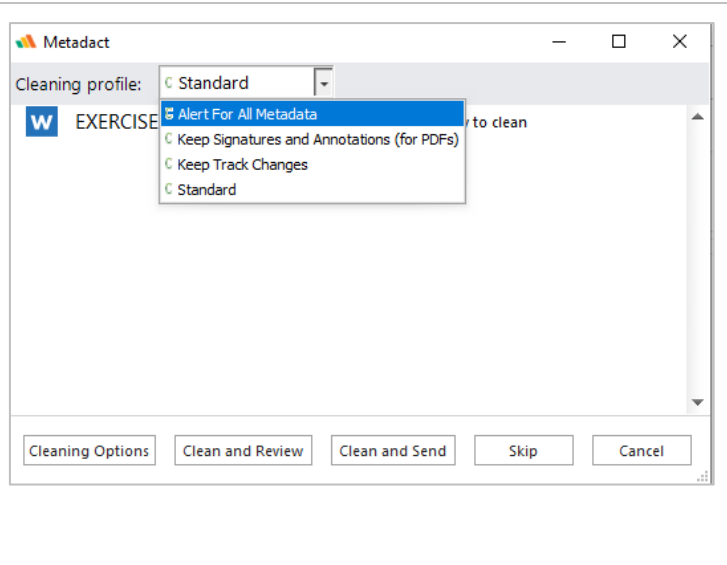




Cleaning Profile Descriptions

When email attachments are sent outside the firm, the **Cleaning profiles** listed below display when you click *Send*. You can then click the **Metadact buttons** at the bottom of the screen to manage metadata processing for the email attachments.

- **Standard** – (Default) For general communication with clients and other external parties. This cleaning profile removes common-place metadata like author information and track changes.
- **Alert For All Metadata** – Alerts you to any abnormal metadata found within an attachment. Gives you full control over the metadata removal.
- **Keep Signatures and Annotations (for PDFs)** – This retains PDF signatures, and annotations such as comments, notes, etc.
- **Keep Track Changes** – Cleans all metadata (including Author information) but keeps all track changes.

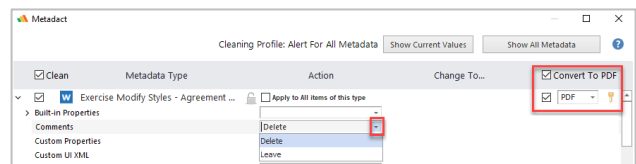


Metadact Window Buttons

This section describes each function in the Metadact window.

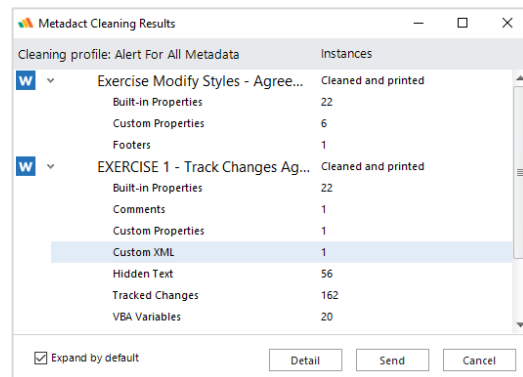
Cleaning Options

- **Cleaning Options** lists metadata components that are cleaned for each attached document.
 - Select the down-arrow of a metadata item to modify its default setting.
 - Go to Cleaning Options to convert attachments to PDF or PDF/A.



Clean and Review

- **Clean and Review** provides a high-level report of all metadata items that will be cleaned for the attached documents.





<p style="text-align: center;">Detail</p> <ul style="list-style-type: none"> Click the Detail button in the <i>Clean and Review</i> window to view simple reports (Risk level, Statistics, Metadata Detected) to the granular Detail Report in the Metadact Detail Report window. 		
<p style="text-align: center;">Clean and Send</p> <ul style="list-style-type: none"> Clean and Send after selecting, and optionally, editing a <i>Cleaning Profile</i> 	<p style="text-align: center;">Skip</p> <ul style="list-style-type: none"> Skip cleaning and send the email with attachments 	<p style="text-align: center;">Cancel</p> <ul style="list-style-type: none"> Cancel the process and return to the email

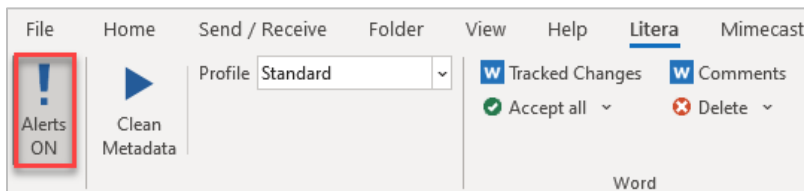
Alerts Window

The Alerts window feature exists for Track Changes attachments.

<ul style="list-style-type: none"> Change Track Changes settings by clicking <input type="checkbox"/> to change the default Accept all setting to either Reject all or Leave. Change Comment settings by clicking <input type="checkbox"/> to change the default Delete setting to Leave. 	
<ul style="list-style-type: none"> Click Setting will be applied to the following documents if you have multiple Track Changes files that must have different metadata cleaning settings. 	<p style="text-align: center;">> Settings will be applied to the following documents:</p>

Alerts Window – Turn off

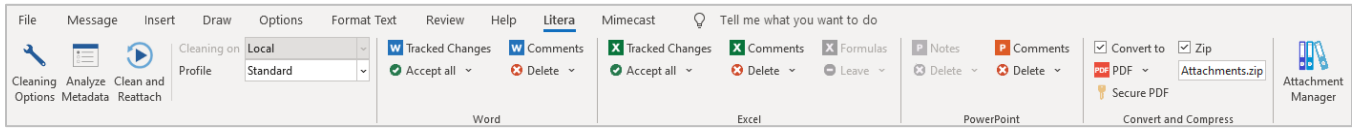
The Alerts window can be toggled off from the main Outlook view Litera ribbon. This is helpful if Track Changes are always accepted or cleaned.





Outlook: Metadact Litera Ribbon Features

Use the Litera ribbon’s Metadact functions to scrub email attachments before pressing **Send**.



Litera Ribbon – Access

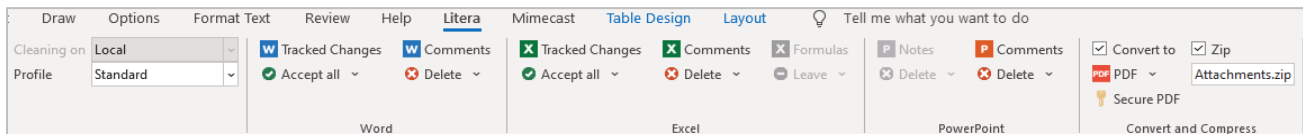
The Litera ribbon can be access from main Outlook view or from an open email. The ribbons are similar with a vital difference.

- Modifications applied from the Litera ribbon in an email applies to the email.
- Modifications applied from the Litera ribbon in Outlook main view will apply to all emails sent during the current session or until the settings are changed from that ribbon.

Litera Ribbon - Customize a Profile

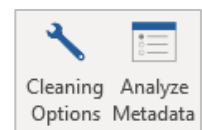
While the available Profiles provide the cleaning solutions for most situations, you can customize each of the profiles using the Litera ribbon’s Word, Excel, PowerPoint and PDF tools.

- Select the **Profile** then modify the metadata options in the **Word, Excel, PowerPoint** or **Convert and Compress** groups.
 - Some tools are unavailable depending on the *Profile* selected. *Alert For All Metadata* provides the most latitude for customizing scrubbing options.
 - **Convert and Compress** contains tools for converting attachments to PDF or PDF/A, adding a secure password, zipping all or selected attachments.
- **Clean and Reattach** scrubs the metadata in accordance with the selected *Profile* and profile modifications then reattaches the documents to the email.



Litera Ribbon – Cleaning Options and Analyze Metadata

- **Cleaning Options** lists all the metadata components that are cleaned for each attached document.
- **Analyze Metadata** provides a macro to micro-**Risk level** analysis of the attachments. This is the *Metadact Detail Report* described above.










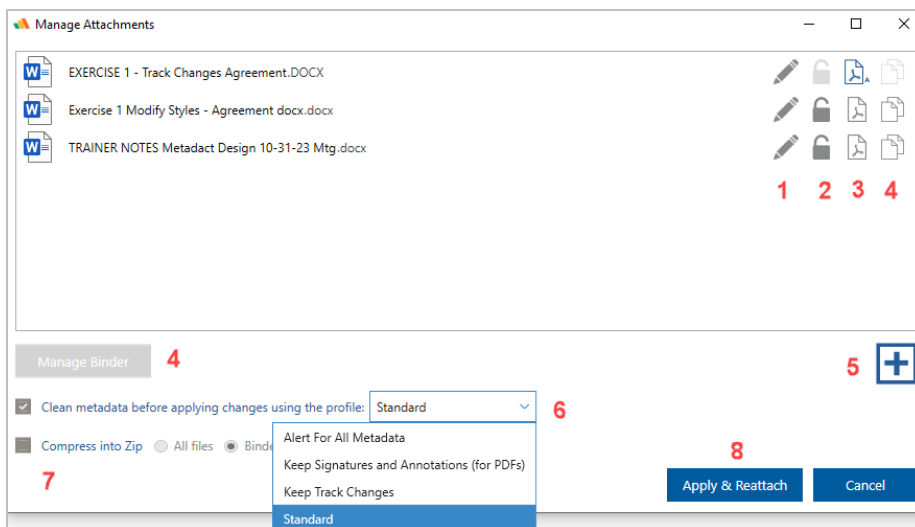
Litera Ribbon - Attachment Manager

The **Attachment Manager** is great solution to manage one or more email attachments. Beyond its metadata cleaning capabilities, the Attachment Manager provides tools to:

- o Edit the file names,
- o Add a password,
- o Convert files to PDF, or
- o Add files to a PDF binder.

These functions can be applied to one or more of the attached files. You can also drag the file icons to reorder.

	1	 Edit the file name	5	Add more files
	2	 Add a password (send the password in a separate email)	6	Select a Profile (apply before changes)
	3	 Convert to PDF	7	Create a zip from the files or binder
	4	 Combine selected files into a PDF and Manage Binder (Add/name cover page)	8	Apply the modifications and reattach



Locally saved documents can be dragged into an open Manage Attachments window.

Note: While the Binder option is a convenient tool, any client-related PDF binder files should be created through Kofax Power PDF and saved to the appropriate matter workspace in iManage.

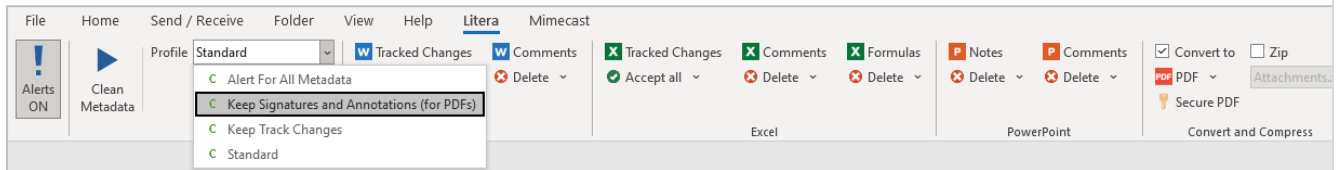


Outlook: Clean Attachments in Received Email

Metadact options can be accessed from the **Message** or **Litera** ribbons in the Outlook main window as well as the **Litera** ribbon an open email.

Clean a received attachment from the main Outlook window

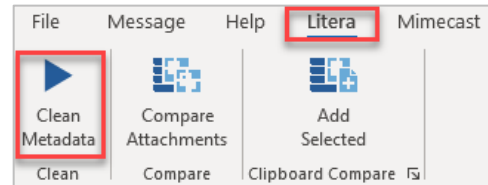
1. Highlight the email then select desired **Profile** from the drop-down menu.
 - o To customize a **Profile**, select the desired *Profile*, then edit any of the **Word**, **Excel**, **PowerPoint**, or **Convert and Compress** options.



2. Click Clean Metadata.
3. **Metadact desktop app** opens with the attachments inserted. See the **Metadact Desktop Application** overview below for more information.

Open a received email to clean an attachment

1. In a received, open email, go to the **Message** or **Litera** ribbon then select **Clean Metadata**.
2. The **Metadact Desktop** application opens.



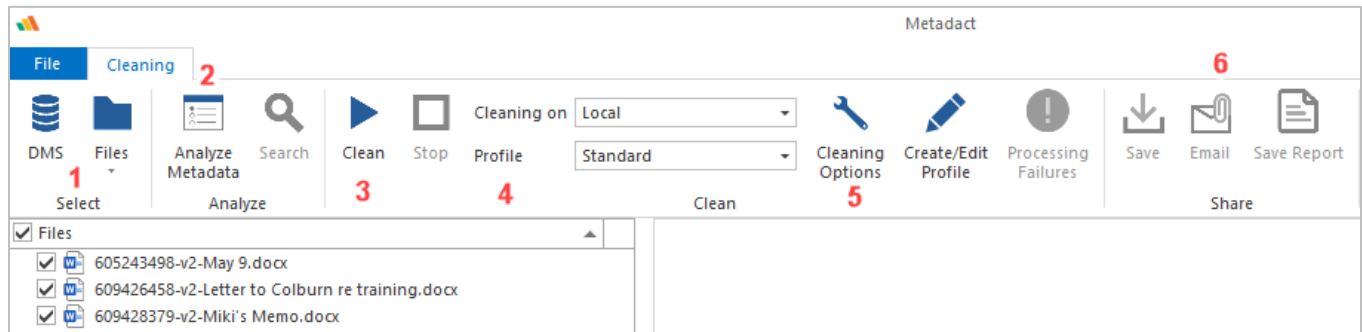
See the **Metadact Desktop Application** overview below for more information.



Metadact Desktop Application

The Metadact app **Metadact** is available from the **Start** menu in the **Litera** folder for cleaning or analyzing documents saved to a local folder or the iManage.

As discussed earlier in this guide, the Metadact app also opens when clicking **Clean Metadata** when scrubbing received email attachments.



<p>1 Insert files from the DMS or Local Files/Folders</p>	
<p>2 Analyze Metadata provides a macro to micro-Risk level analysis of the attachments. Click Save Report (<i>Share</i> group) to save.</p>	
<p>3 Clean the attached files using the selected Profile.</p>	
<p>4 Select the Profile.</p>	
<p>5 Cleaning Options lists all the metadata components that will be cleaned for each attached document. To modify a setting, choose an option from the drop-down menu.</p>	
<p>6 Share - Save or Email the clean file, Save the metadata report.</p>	

Metadact File Explorer, Word, Excel and PowerPoint

Proactively access Metadact to clean open documents in Word, Excel and PowerPoint as well as documents available in File Explorer. These Metadact access points open the Metadact desktop app for metadata processing.


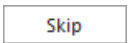
<ul style="list-style-type: none"> File Explorer (right-click) 	
<ul style="list-style-type: none"> Litera ribbon in Word, PowerPoint and Excel 	



Email Attachment Scenarios


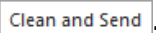
Send an email without cleaning the attachments

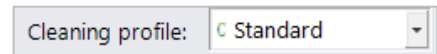
If you would like to maintain the metadata in a document or are not concerned that the recipient sees metadata (e.g., author, create/modify date, Track changes), you can choose to **Skip** cleaning.

3. In an email, click  .
4. In the Metadact window, click  .

Send an email with Track Changes – Accept All Track Changes



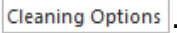
The default Standard Cleaning profile automatically accepts all Track Changes. Select Clean and Send to accept all (remove) the Track Changes in the attachments.

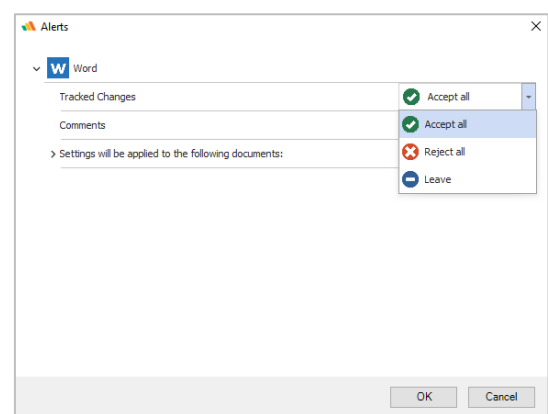
1. In an email, click  .
 - o In the *Metadact* window, leave the default *Cleaning profile* selection, **Standard**.
2. Click  .



Send an email with Track Changes – Keep Track Changes (Alerts window)

If you would like to leave Track Changes in the document, you can adjust the setting in the Alerts window. Note: This will remove the Author information. This means that each change will not identify the specific person who made the edit. Please see the scenario *Send an email with Track Changes – Keep Track Changes and Retain Author Information* to modify the Author setting.



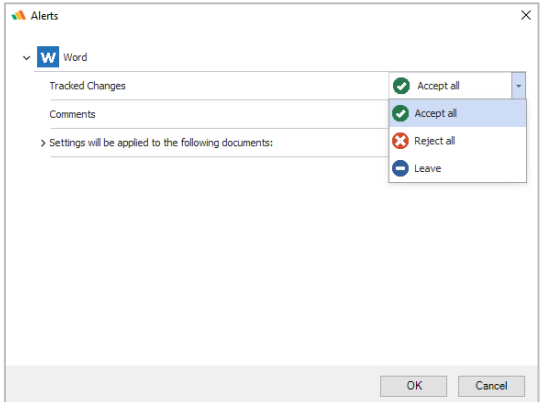

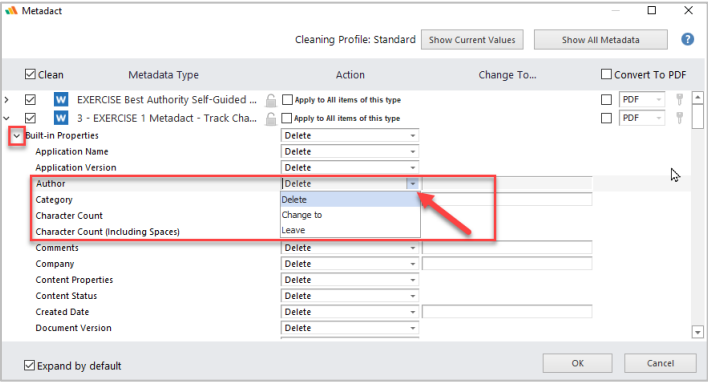
1. In an email, click  .
2. In the *Alerts* window, click the Tracked Changes down-arrow  and select **Leave**.
3. Click **OK**.
4. In the Metadact window, click  .



Send an email with Track Changes – Keep Track Changes and Retain Author information



If you need to edit more than Track Changes, for example, retain the Author information for each change made in a document, go to Clean Options to change the Built-in Properties.

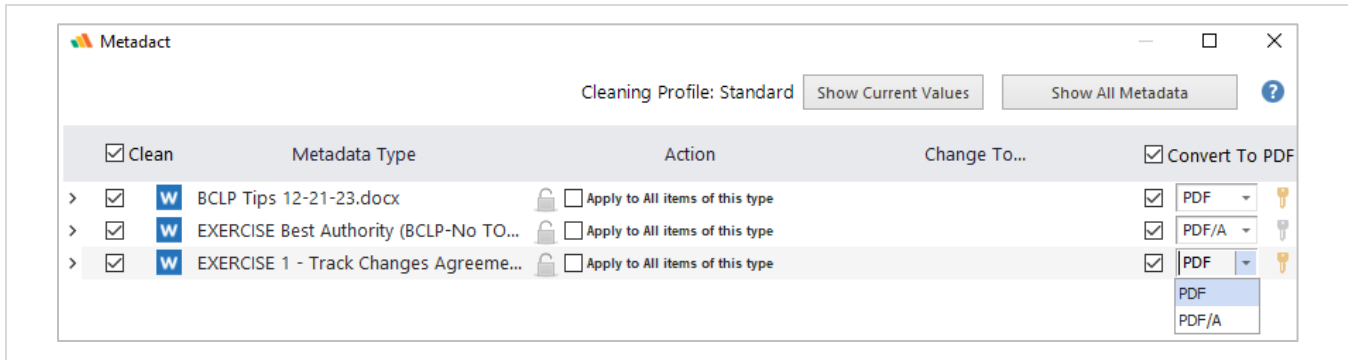


<ol style="list-style-type: none"> 1. In an email, click . 2. In the <i>Alerts</i> window, click the Tracked Changes down-arrow  and select Leave. 3. Click OK. 4. Click Cleaning Options. 	
<ol style="list-style-type: none"> 5. Expand to view the metadata of the desired document, then expand Built-in Properties to view common metadata like Author, Create/Modified Dates. 6. Click the Author field  and select Leave. 7. Click OK then Clean and Send. 	

Metadact Window: Send and Convert Attachments to PDF or PDF/A

Converting attachments to PDF or PDF/A is available in both the Metadact window and the Litera ribbon.

<ol style="list-style-type: none"> 1. In an email, click . 2. In the <i>Metadact</i> window, select the <i>Cleaning profile</i> or leave the default, Standard, selected. 3. Click Cleaning Options. 4. Check the document box, then click  to convert a file to PDF or PDF/A. <ul style="list-style-type: none"> o To convert all the files to PDF, check the Convert to PDF box. o Uncheck individual document Convert to PDF boxes if you do not wish to convert that attachment to PDF 	
--	--



Litera Ribbon: Convert to PDF, PDF/A, and Secure

All attachments can be converted to PDF, PDF/A, and secured from the Litera ribbon.

<ol style="list-style-type: none"> In an open email, go to the Litera tab. Choose the desired Profile. Go to the Convert and Compress group, then check the Convert to box. Click <input type="checkbox"/> to convert a file to PDF or PDF/A. 	
<ol style="list-style-type: none"> Optionally, click Secure PDF to add a password to the file. Click <input type="button" value="Clean and Reattach"/> , then click <input type="button" value="Send"/> . <ul style="list-style-type: none"> A Cleaned confirmation message displays. Click <input type="button" value="Clean and Send"/> . 	

Litera Ribbon Main View: Convert to PDF and Customize all profile settings for an Outlook session

Modifications applied from the Litera ribbon in Outlook main view will apply to all emails sent during the current session or until the settings are changed from that ribbon.

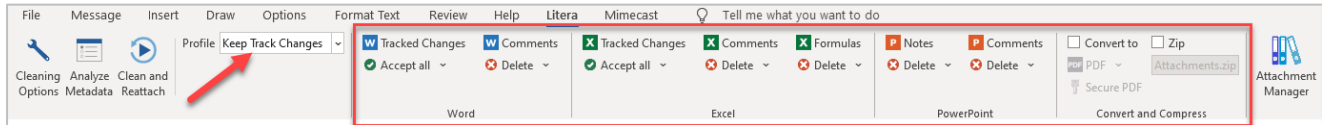
- In the main Outlook view, go to the **Litera** ribbon.
- Select the PDF setting in the **Convert and Compress** group.
- These options will be set for new emails with attachments sent outside the firm.



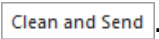


Litera Ribbon: Modify a Profile


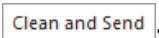
Common customizations of the default Cleaning profile can occur from the Litera ribbon prior to clicking the Send button in an email.

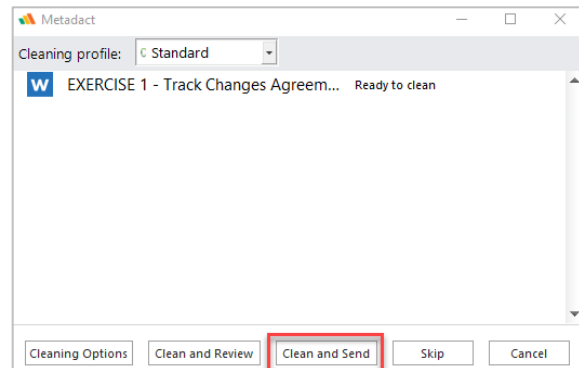
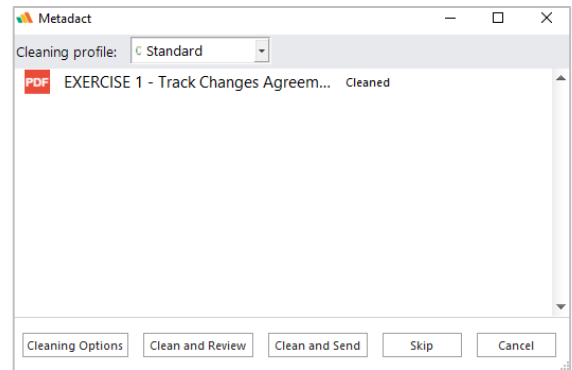
1. In an open email, go to the **Litera** tab.
2. Choose the desired **Profile**.
3. Go to either the **Word**, **Excel**, **PowerPoint** or **Convert and Compress** groups to modify the selected Profile.



4. Click , then click .
 - o A **Cleaned** confirmation message displays.
 - o Click .

-OR-

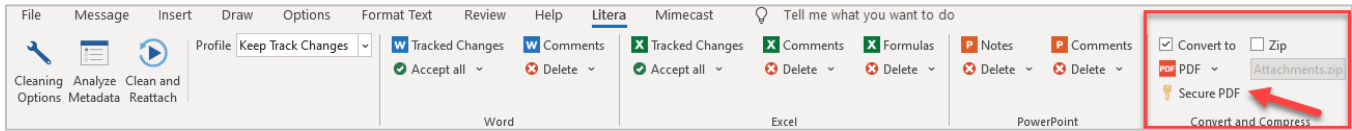
5. Click  then .



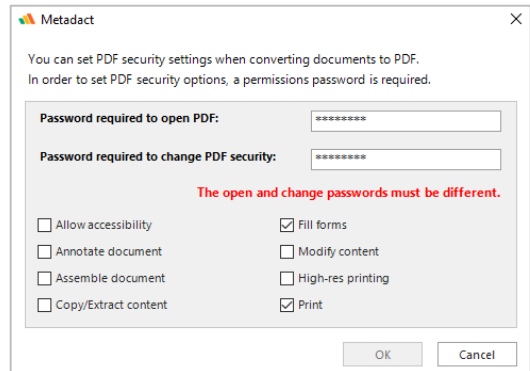


Litera Ribbon: Convert to PDF and Secure All Attachments

Use the Litera ribbon to both Convert to PDF and Secure All Attachments.



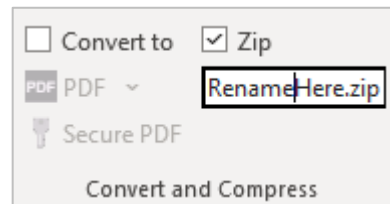
1. In an open email, go to the **Litera** tab, and select **Secure PDF**.
 2. Set a password for:
 - o **Password required to open PDF**; or
 - o **Password required to change PDF security** (check any of the boxes to further customize access).
- Note: If both passwords are set, they must be different.
3. Click **OK**.



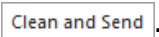


Litera Ribbon: Zip and Clean Attachments

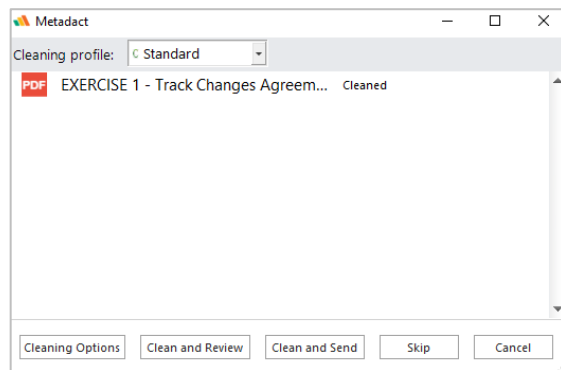
Attachment can be compressed into a zip file and named from the Litera ribbon.

1. In an open email, go to the **Litera** tab.
2. Choose the desired **Profile**.
3. Go to the **Convert and Compress** group, then check the **Zip** box.
4. Click into the **Attachments.zip** box to rename the zip file.


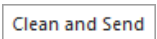
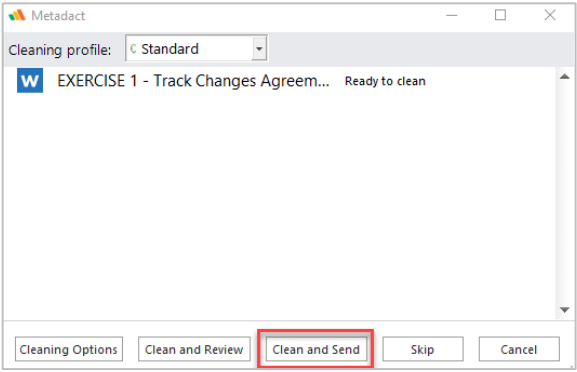


5. Click , then click .
 - o A **Cleaned** confirmation message displays.
 - o Click .

-OR-



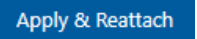

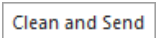
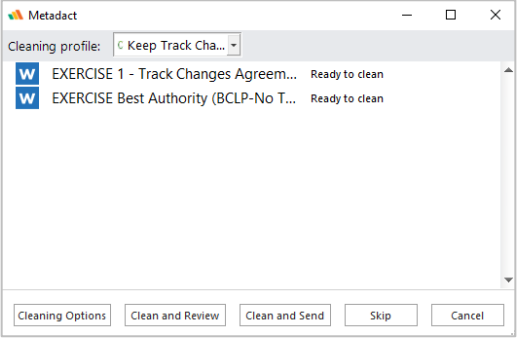




<p>Click  then .</p>	
--	--



Litera Ribbon Attachment Manager: Convert Attachments to PDF

The Attachment Manager allows you to select the files to convert to PDF.

<ol style="list-style-type: none"> In an open email, go to the Litera tab, and select Attachments Manager. In the <i>Manage Attachments</i> window, click  to choose the file or files to be converted. 	
<ol style="list-style-type: none"> When done, click . Click  then . 	


Litera Ribbon Attachment Manager: Rename Attachments and Clean

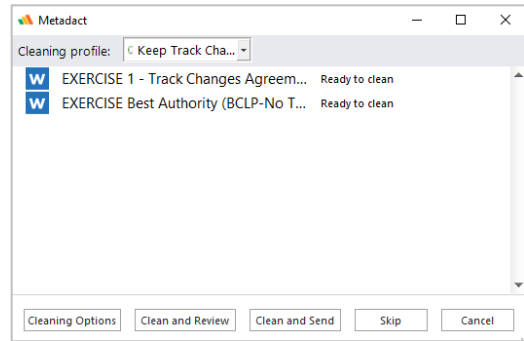
You can now rename email attachments using the Attachment Manager.

<ol style="list-style-type: none"> In an open email, go to the Litera tab, and select Attachments Manager. In the <i>Manage Attachments</i> window, click  to edit the file name. 	
--	---



3. When done, click **Apply & Reattach**.

4. Click  then click **Clean and Send**.



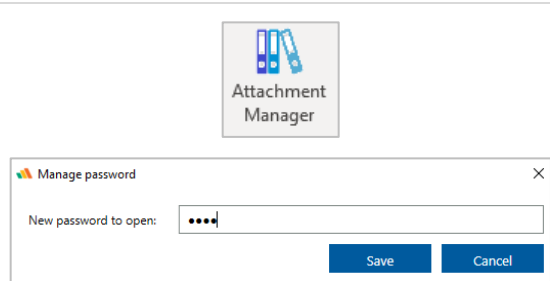
Litera Ribbon Attachment Manager: Secure Specific Attachments

Use the Attachment Manager if you wish to secure one or more, but not all attachments.


1. In an open email, go to the **Litera** tab, and select **Attachments Manager**.

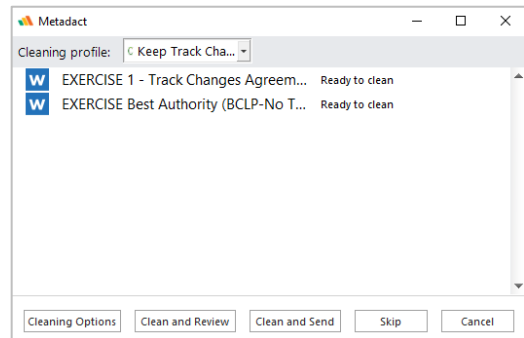
2. In the *Manage Attachments* window, click .

3. Enter a password then click **Save**.




4. When done, click **Apply & Reattach**.

5. Click  then **Clean and Send**.







Litera Ribbon Attachment Manager: Reorder Attachments

<ol style="list-style-type: none"> 1. In an open email, go to the Litera tab, and select Attachments Manager. 2. In the <i>Manage Attachments</i> window, drag the file icons to reorder the list. 	
<ol style="list-style-type: none"> 3. When done, click Apply & Reattach. 4. Click  then Clean and Send. 	

Litera Ribbon Attachment Manager: Combine Attachments into a PDF and Manage Binder


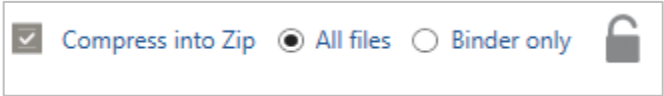

Combine selected files into a PDF and select Manage Binder to add a cover page, table of contents, or separator page.

<ol style="list-style-type: none"> 1. In an open email, go to the Litera tab, and select Attachments Manager. 2. In the <i>Manage Attachments</i> window, click  for every file to be combined into a single PDF. 	
<ol style="list-style-type: none"> 3. To rename the file, add a cover page, TOC, or separator page, click Manage Binder. 4. When done, click Apply & Reattach. 5. Click  then Clean and Send. 	



Litera Ribbon Attachment Manager: Zip and Clean Attachments

This feature allows you to choose which attachments to zip. Note: If you reorder the files and zip, the zip file will always be last file in the email.

<ol style="list-style-type: none"> 1. In an open email, go to the Litera tab, and select Attachments Manager. 2. In the <i>Manage Attachments</i> window, click the Compress into Zip check box. <ul style="list-style-type: none"> o As indicated, you can compress All files or the (PDF) Binder only. 	 
<ol style="list-style-type: none"> 3. When done, click Apply & Reattach. 4. Click  then Clean and Send. 	