LEGAL TECHNOLOGY COMMITTEE
# SECURITY SETTINGS IN PRIVILEGED DOCUMENTS

THE LAW SOCIETY
OF NEW SOUTH WALES

# SECURITY SETTINGS IN PRIVILEGED DOCUMENTS

You may not be aware that many electronic documents contain embedded information designed to assist the document author or intended reviewer. Types of embedded information can include document metadata, text editing history via hidden track changes, inserted review comments and even underlying text buried underneath redaction blockouts. In many situations, some or all of this embedded data may contain confidential information. Unless this information is removed prior to sending, it is possible for unintended recipients to access it and potentially compromise the author or the intended recipient.

## What is metadata?

Both Microsoft Word and Adobe PDF files contain metadata which captures various document properties and statistics such as the author, date of document creation, date of last modification and comments.

## How can you remove hidden metadata and track change history from your documents?

### PDF documents:

You will need Adobe Acrobat software. Early versions of Adobe Acrobat provide an Examine Document function where the user is prompted about which hidden metadata (comments, metatags, etc.) should be stripped out. Later versions of Acrobat, such as Acrobat X, replaced the Examine Document function with a more automated **Sanitize Document** function (under menu options View>Tools>Protection).
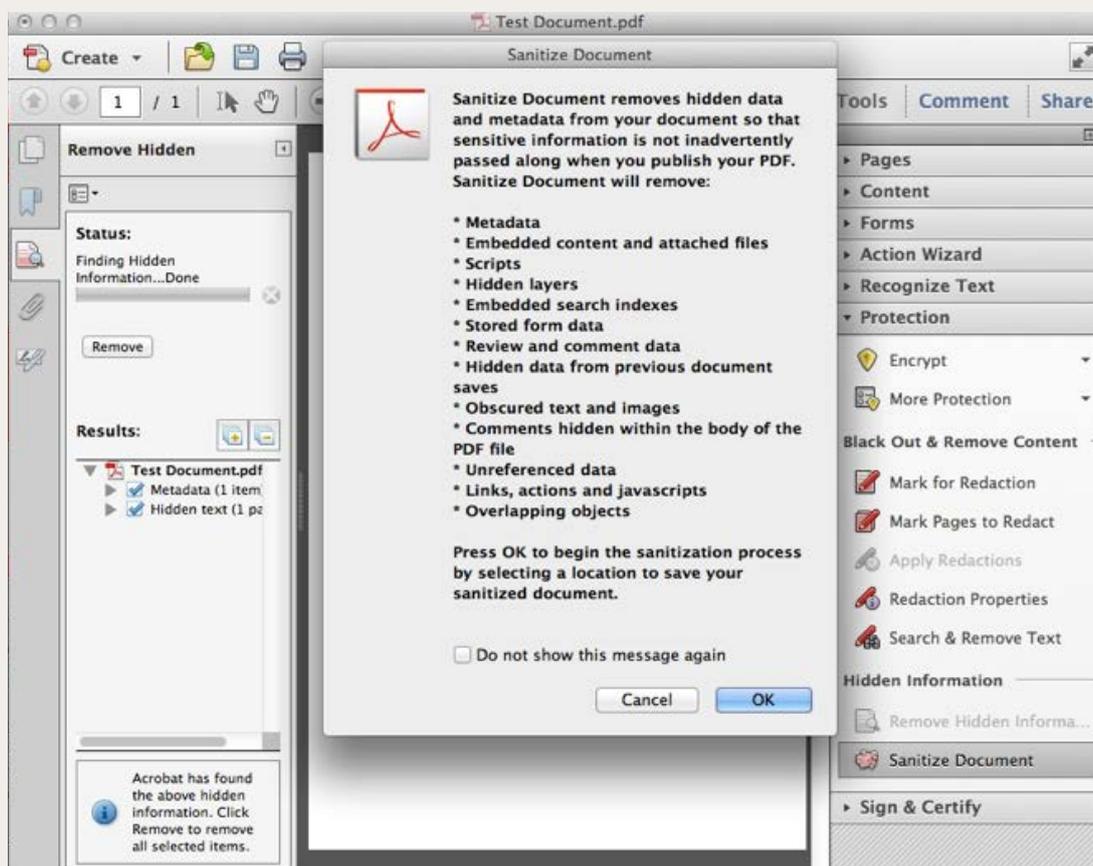
In addition, Acrobat X, also provides a step by step automated Publish Sensitive Documents tool under its Action Wizard options.



For further information for Actrobat 9 see http://acrobatusers.com/tutorials/cleaning-your-pdf-documents and for Acrobat Pro see https://helpx.adobe.com/acrobat/using/optimizing-pdfs-acrobat-pro.html.

## Microsoft Word documents:

This will depend on which version of Office you are using and whether you use a PC or Mac.

**PC:** For Office 2007 and later versions, there is a Document Inspector application from Microsoft which provides the same data stripping function as Adobe's Examine Document. For further information, see: https://msdn.microsoft.com/en-us/vba/office-shared-vba/articles/using-the-document-inspector and https://support.office.com/en-us/article/remove-hidden-data-and-personal-information-by-inspecting-documents-356b7b5d-77af-44fe-a07f-9aa4d085966f. and
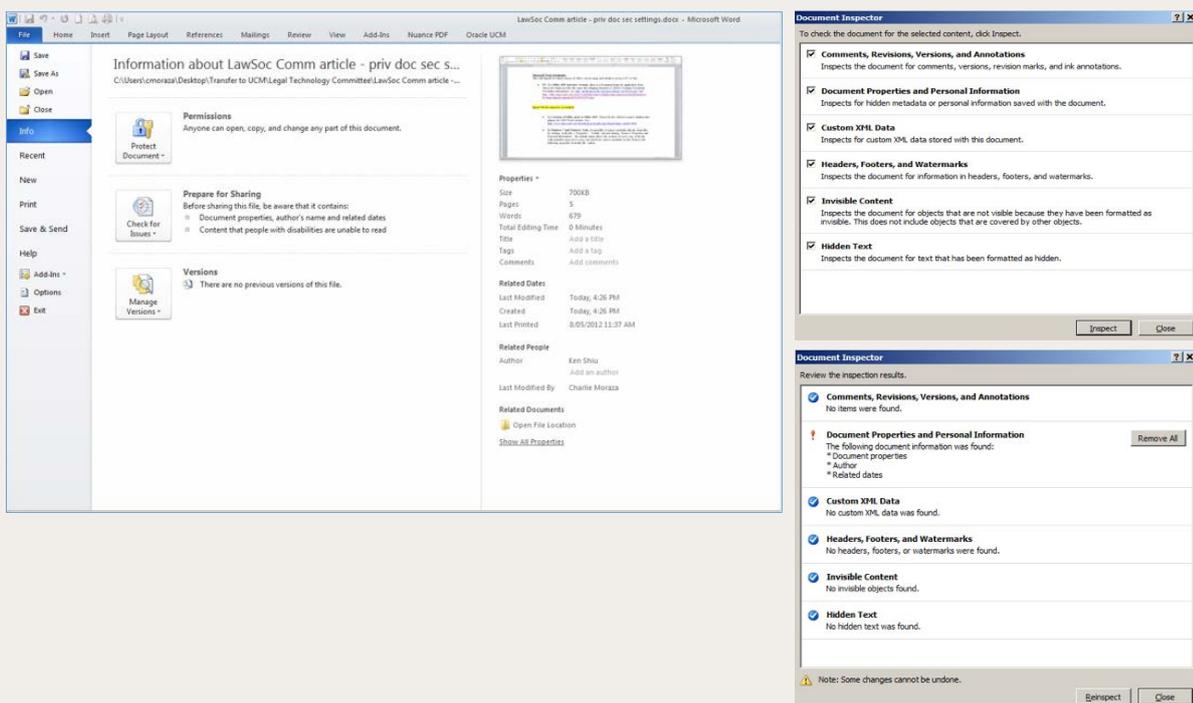
**For versions of Office prior to Office 2007:** Microsoft also offered a remove hidden data plug-in for 2003 Word versions.

**In Windows 7 and Windows Vista,** it is possible to remove metadata directly from files by clicking on the file's "Properties", "Details" tab and clicking "Remove Properties and Personal Information". The default option allows the creation of a new copy of the file with metadata removed or a user can selectively remove metadata via the 'Remove the following properties from this file' option.
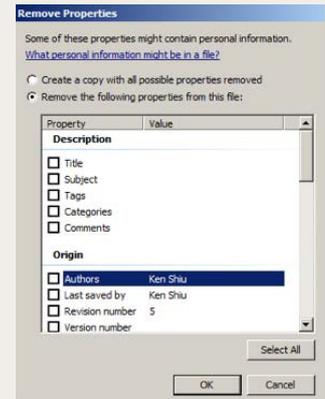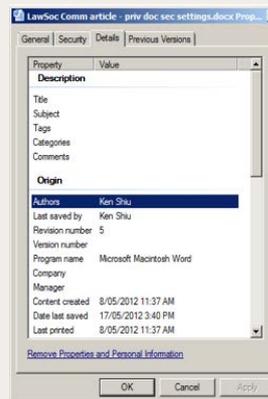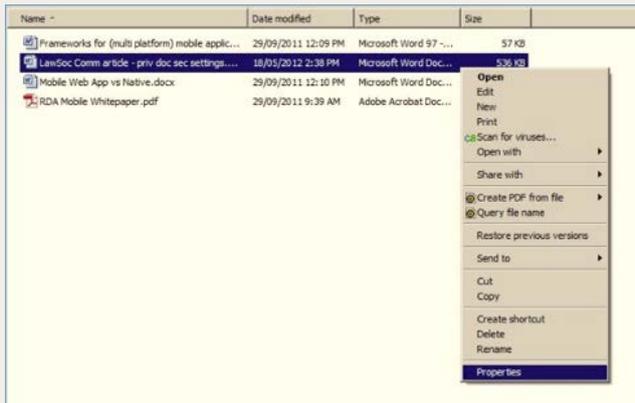


**Apple Mac:** The Mac versions of Microsoft Word and Office do not include the Document Inspector application or function. Mac Word users are recommended to ensure to check the document privacy options from the Word drop down menu bar by selecting Word>Preferences>Security>enable "Remove personal information from this file on save". There is also another checkbox option to warn you if a document contains track changes or comments before printing or savings. See screenshot below.

## Document Redaction

Some people often mistakenly assume that by simply blocking out text onscreen in an electronic document by using the inbuilt graphics tools (e.g. covering text using a solid black rectangle or using black highlighting tool) will have the same effect as using a black marker to redact text on a physical document. In electronic documents, it is possible by using the copy and paste function to reveal this type of obscured text in a new document.

There are a few options to move safely redact text or graphics in documents.

- PDF documents: Adobe's Acrobat software product contains a built-in redaction tool. Adobe also provides a useful white paper guide to redacting documents from within Microsoft Word and within PDF documents. See: http://blogs.adobe.com/security/2006/03/proper_redaction_techniques_in.html Also check Adobe's blog for legal professionals: http://blogs.adobe.com/acrolaw/category/redaction/
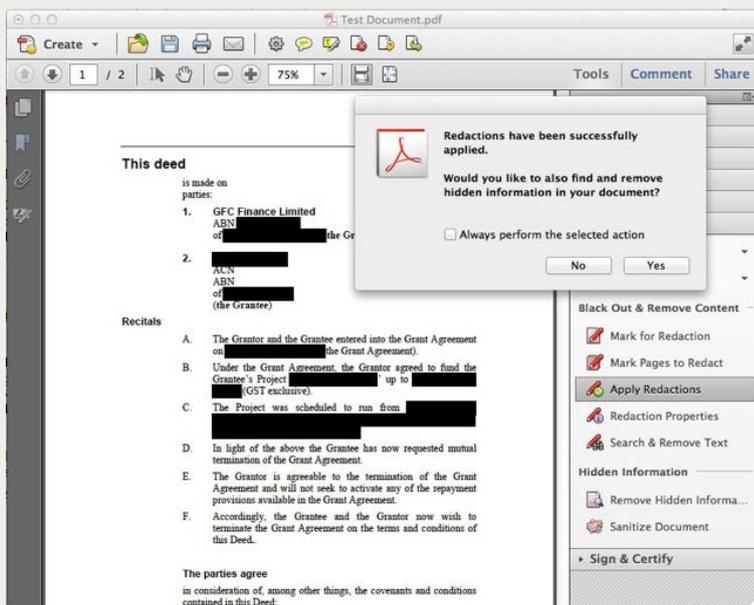


- Microsoft Word Documents: An open source Word 2007 redaction tool is available in 2018 from Codeplex (note: the tool is not officially supported by Microsoft). See: http://redaction.codeplex.com .

One simple method is to use a printer driver that instead of printing to a physical printer, creates a pdf file that is an image of the document rather than a document containing metadata. For PCs, there are various third party PDF software available, some such as PDF ReDirect (http://www.exp-systems.com/) and PDF995 (http://www.pdf995.com/) offer a freeware version.