

MetaReveal



What's MetaReveal

[Product Overview](#)



What's New in MetaReveal

[New Features](#)



Introducing
BEC Legal's
MetaReveal
for metadata
management

With **MetaReveal**, you can safely share files outside your organization in two ways:

- In Word and Excel files, analyze metadata (and hidden data) and remove it when needed.
- For Word, Excel and PowerPoint files, convert to PDF.

What are metadata and hidden data?

When Word documents and Excel spreadsheets are created, electronic information known as metadata (and also hidden data) is stored within the file.

Types of metadata include *Author Name, Date Created, Revision Number* and other items. Hidden data includes Tracked Changes, Comments and Hidden Text. Metadata and hidden data are not visible in the document but are always present in the electronic file properties and travel with a document when it is shared, even when it is emailed outside your organization.

Understanding metadata is important....



Understanding metadata is IMPORTANT!

- Many types of metadata and hidden data should not remain in documents when they are shared externally.
- Sometimes, however, metadata is needed (for example, Tracked Changes and Comments for collaboration.)



Electronic file sharing can happen in many ways, so a flexible solution is needed.

MetaReveal Processing Locations

Conveniently, MetaReveal processing can be initiated from any of these places.



Outlook: outgoing mail message attachments



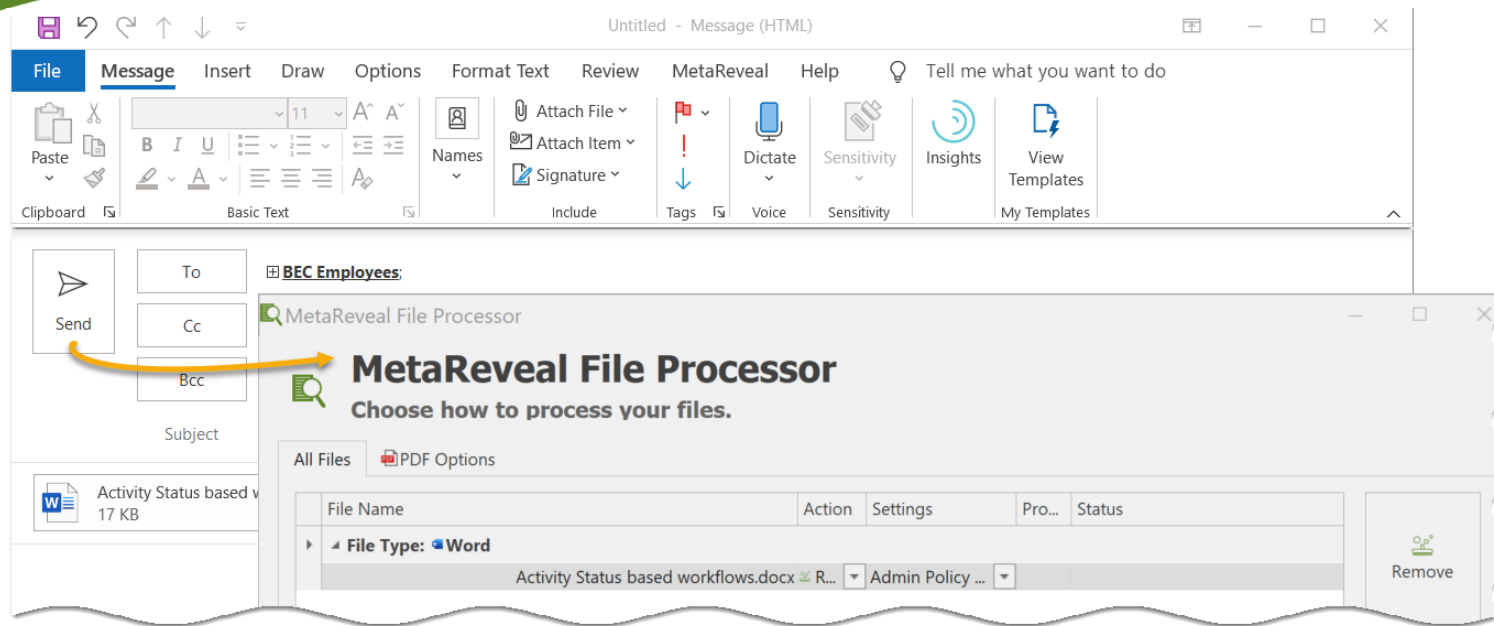
OneDrive: files can be processed in bulk before a folder is shared

Bulk processing can also be done in the Windows file system



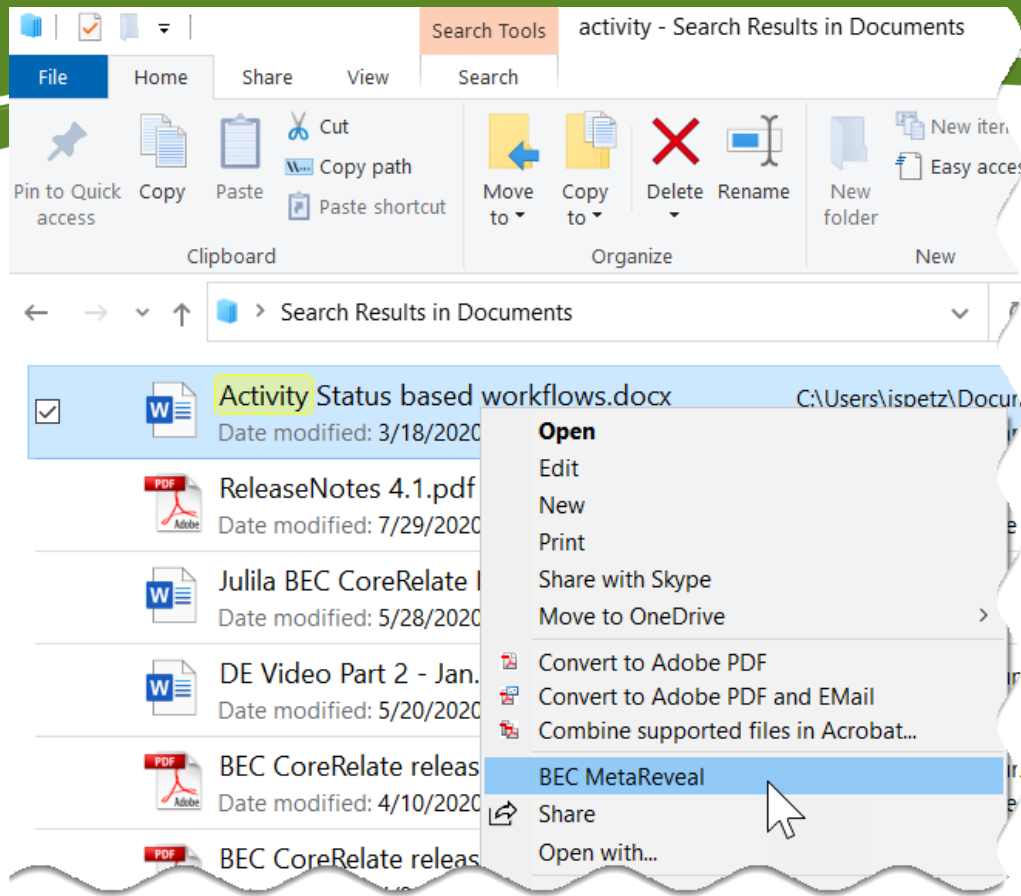
In Word or Excel file
(from the Word or Excel ribbon)

Processing from Outlook Attachment



When you attach Word, Excel, PowerPoint, or Zip files to an outgoing mail message, the prompt to stop and handle metadata is automatic.

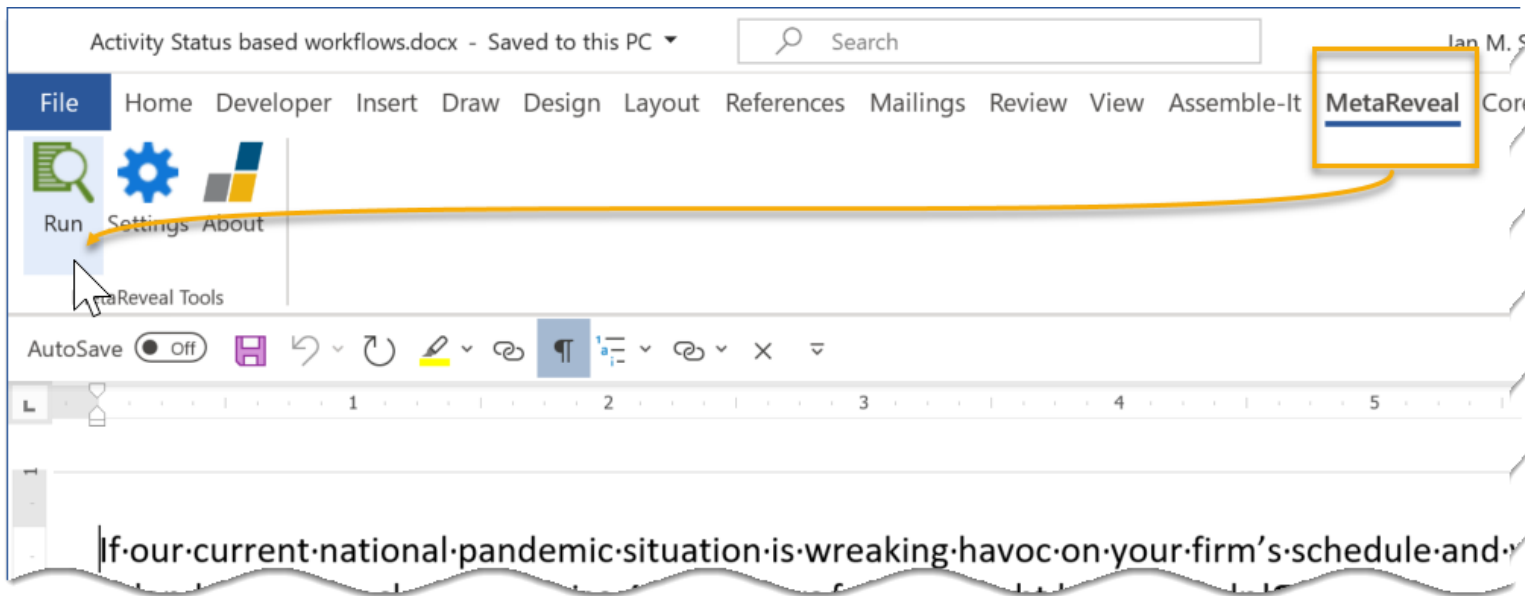
Processing from Windows File System



In the Windows file system, you can right click on one or more files to initiate metadata processing.

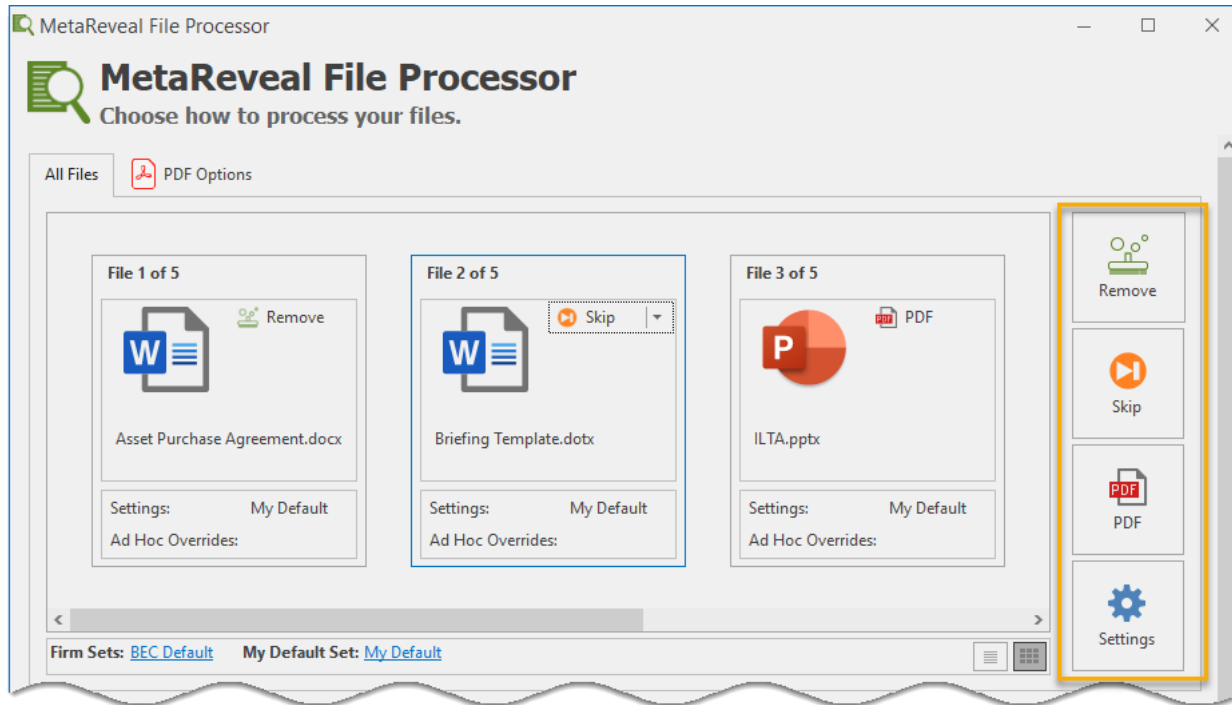
This also works in OneDrive.

Processing from Word or Excel File



Inside a Word or Excel file, you can initiate metadata processing from the ribbon.

MetaReveal Processing Choices



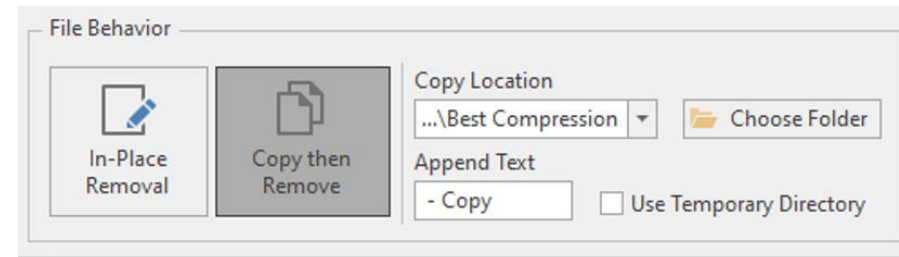
After initiating this process from Outlook, Windows, or Word/Excel, you can:

- Remove unwanted metadata and hidden data from Word and Excel files with the **Remove** function.
- **Skip** processing and leave files as they are.
- Convert Word, Excel, and PowerPoint files to PDF with the **PDF** setting.

Remove in Place or Copy

When removing metadata from Word and Excel files, you can:

- ***Remove in Place*** – metadata is processed, and this modifies the file. The file remains in the same Windows file location.
- ***Copy Then Remove*** – the file is copied before metadata is processed (with the text “- Copy” appended to the new file.)



Send Email

or

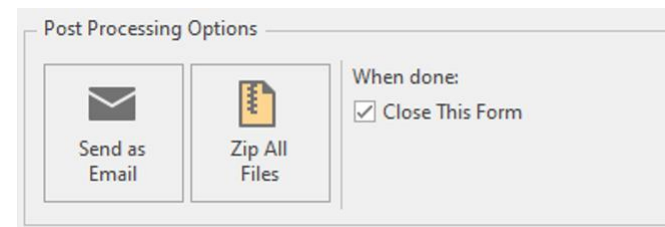
ZIP

or

Both

From OneNote (or other Windows file), you can process metadata or convert to PDF, then automatically:

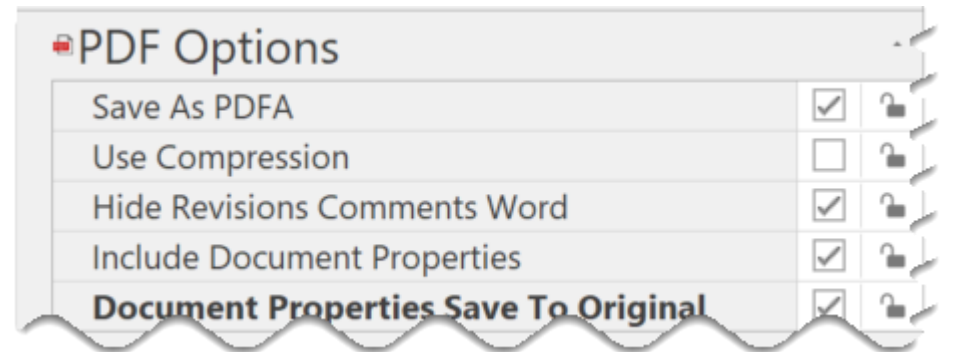
- *Send as Email* –attaches all processed files to a new mail message, ready for you to send.
- *Zip All Files* – bundles all processed files into a newly created .zip file.
- *Send as Email and Zip All* – the two options can be used together, which attaches the .zip to a new mail message but does not save it elsewhere.



PDF Creation Options

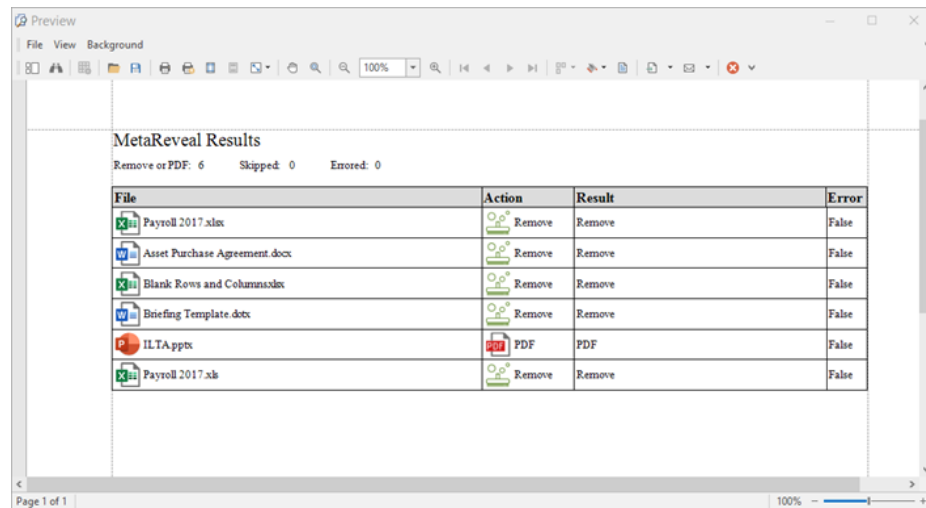
When creating a PDF, you can:

- Include Document Properties
 - Author, Subject, Title or Keywords can be retained from the Word/Excel file or updated in the PDF as its created
- Save as PDF/A
- User Compression
- Hide (or not) Word Revisions or Comments



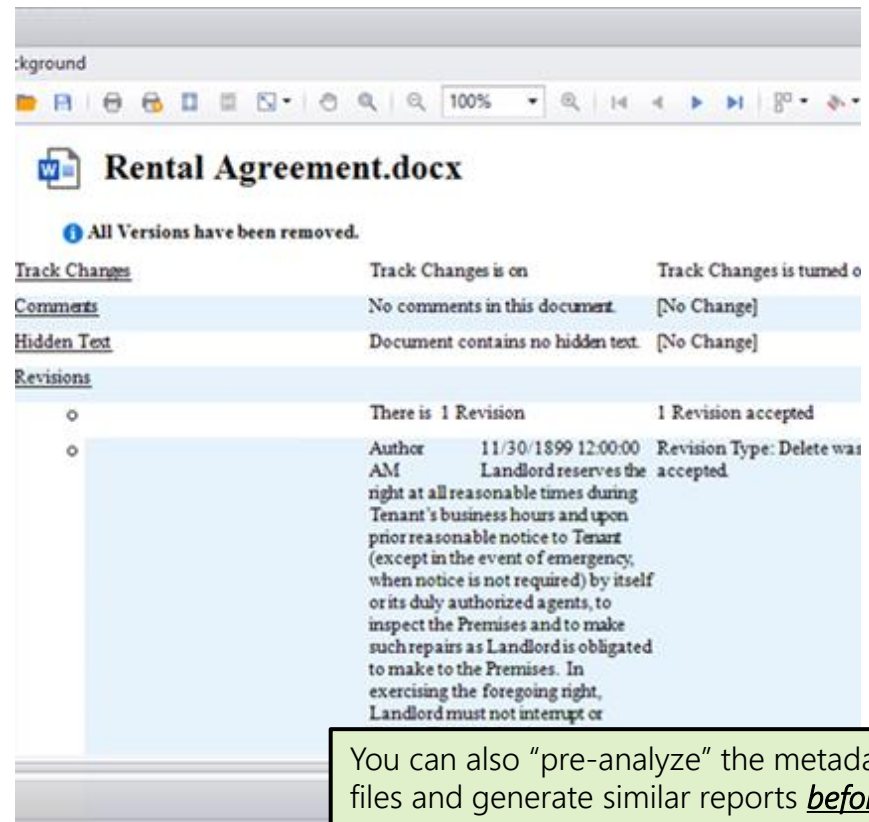
Metadata Analysis and Reporting

Summary Report – generates a table of file names, process action taken, and results



File	Action	Result	Error
Payroll 2017.xlsx	Remove	Remove	False
Asset Purchase Agreement.docx	Remove	Remove	False
Blank Rows and Columns.xlsx	Remove	Remove	False
Briefing Template.docx	Remove	Remove	False
ILTA.pptx	PDF	PDF	False
Payroll 2017.xls	Remove	Remove	False

Detail Report – provides detailed information about the metadata and hidden data that has been removed from your Word and Excel files



Background

Rental Agreement.docx

All Versions have been removed.

Track Changes Track Changes is on Track Changes is turned on

Comments No comments in this document. [No Change]

Hidden Text Document contains no hidden text. [No Change]

Revisions There is 1 Revision 1 Revision accepted

Author 11/30/1899 12:00:00 AM Revision Type: Delete was accepted

Landlord reserves the right at all reasonable times during Tenant's business hours and upon prior reasonable notice to Tenant (except in the event of emergency, when notice is not required) by itself or its duly authorized agents, to inspect the Premises and to make such repairs as Landlord is obligated to make to the Premises. In exercising the foregoing right, Landlord must not interrupt or

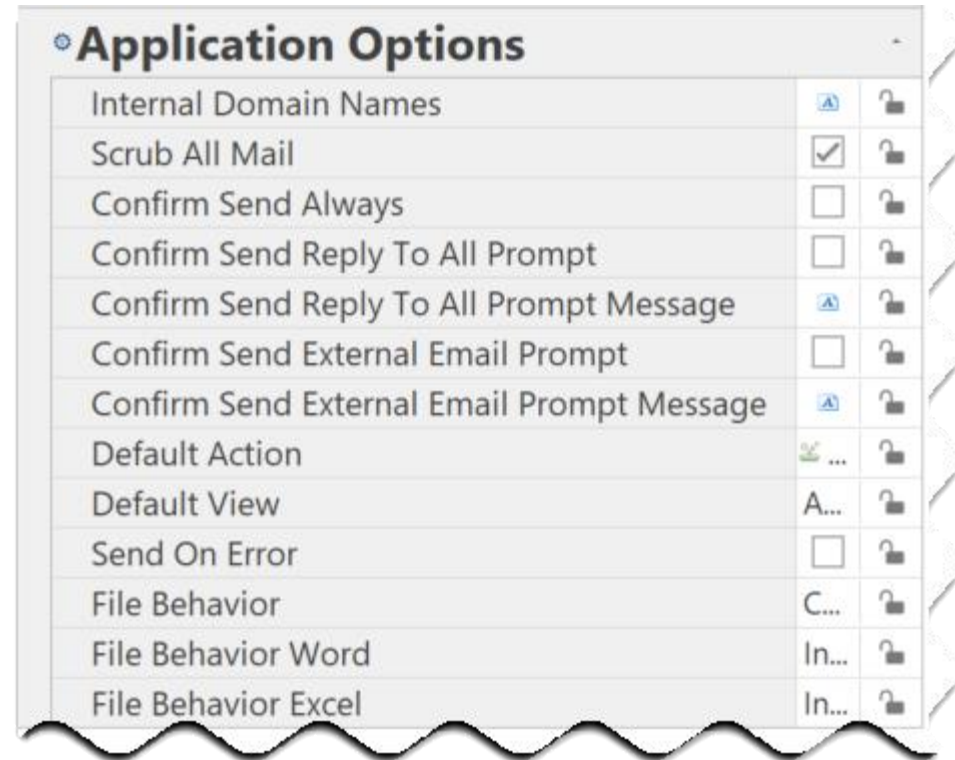
You can also "pre-analyze" the metadata in the Word and Excel files and generate similar reports *before processing* the files.

Application Behavior Extras

Optional extra features prompt users to be cautious with mail attachments:

- Scrub All Mail
- Confirm Send Always
- Confirm Send Reply to All
- Confirm Send External Email Prompt

These can be *locked* or *unlocked*.



Multiple Removal Settings

MetaReveal Settings Editor

MetaReveal Settings Editor - Personal

Create multiple settings groups for document processing.
Details about each setting are provided in a tooltip (hover over)

Enter text to search...

Set Name: My Own! Firm Default


- Excel Options
- Word Options
 - Comments Remove
 - Hidden Text Remove
 - Tracked Changes Accept All
 - Tracked Changes Off
 - All Versions Remove
 - Ole Graphics Convert
 - Hyperlinks Remove
 - Hyperlink Text Remove
 - Attach Normal Template
 - Routing Slips Remove
 - Builtin Document Properties Clear
 - Custom Document Properties Clear
 - Unlink Custom Property Fields
 - Document Variables Delete
 - VBA Code Delete
 - Personal Information Remove On Save
 - Smart Tags Remove
 - Content Type Info Delete
- Application Options
- Ad Hoc Options

Every individual user can save multiple processing option sets to be used for different sorts of files.

Administrators can deploy different processing option sets to different groups or users. Settings can be locked if necessary, so users cannot change them.

Configuration / Administration


Admin Policy – default settings for handling types of metadata; settings can be locked or unlocked



Firm Sets – customizations for practice groups or other user groups (override the Admin policy for special situations)



User Sets – settings created by individuals for their own use (override the firm settings, unless they are locked)



What's New in MetaReveal 5?

Introduced in Q1 2020, MetaReveal 5 introduced these features:

- OneNote / file system bulk processing
- Multiple set configuration
- Save to Zip file

Compatible with Office 2010-2019 and Office 365, and with versions of Windows 10 that are currently supported by Microsoft.

Thank you for
your interest

For more information:

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or

[ILTA>ON Solution Center](#)

or

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