

Wednesday, December 6th, 2006



Don't expose your metadata -- it might be embarrassing

Wed Dec 6 2006

On the cutting edge / Brian T. D. Bowman

I can see your metadata. Well, maybe I can't see your metadata, but there is a good chance that your competitors and clients can see your metadata.

Readers of this column will know that I often write about the vital need to protect confidential commercial information, intellectual property and personal information. Rather than focusing on legislation or theories, today's column discusses an important type of data affecting nearly every business in Canada. If not properly managed, metadata can help other businesses steal your intellectual property, learn about your business processes and view personal information that you're legally required to protect under privacy laws.

If you don't know what metadata is and how to manage it, you are probably unknowingly sending data you don't mean to send whenever you e-mail documents. The results may be that you are unintentionally exposing valuable information to people outside your organization. This could include sensitive or private information that could be embarrassing or extremely damaging if read by your competitors or even clients.

Metadata is not some science-fiction term from *Star Trek*.

So what is it? Metadata is data about data. In plain language, it is detailed information about an electronic document that is automatically created when you use Microsoft Word, PowerPoint or Excel.

Metadata can include the name of the person that created an electronic document, the date that a document was created, the identities of people who modified a document, including the time and day they did so, the name of the computer that was used to create a document, detailed revisions to a document, including past modifications and deleted text not visible on your computer screen.

A simple way to view metadata in any Microsoft Office application is to choose File and then Properties. In Word, a way to view metadata is to choose File, Open, and Recover Text From Any File. You may be surprised by what you see.

Metadata isn't necessarily a bad thing. It can be used for a variety of purposes to assist with editing, filing, reading and retrieving electronic documents.

Most metadata is not terribly interesting or relevant. It usually does not matter who created a document or when it may have been modified. But in some circumstances, metadata can easily expose negotiating strategies to parties on the other side of a business deal. It can also expose who knew what and when within your organization.

If metadata is created and contained in every electronic document, proactive steps should be taken to remove sensitive information from documents e-mailed out of your office. So what should you do to manage your metadata?

The simple answer is get professional advice. Large businesses often employ computer systems professionals who should know how to properly manage your metadata using specialized software tools. But if you work for a small business or on your own, you may not have the benefit of this type of assistance.

Here are some basic steps to manage your metadata. Converting documents into PDF format removes metadata from a document. The latest versions of Microsoft Office and WordPerfect also contain tools to delete metadata. Finally, and as a last resort, you can always send a document as a fax or in hard copy.

In a knowledge-based economy, where information is power, protecting your confidential commercial information, intellectual property and personal information holdings should be a top priority. Accordingly, it is vital to have a strategy in place for managing your metadata.

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