



Workshare[®] Metawall[™] and Gibbons, Del Deo, Dolan, Griffinger & Vecchione

Introduction

Documents are the core product of any law firm. In today's competitive landscape, firms must protect the intellectual property contained in their important legal documents. Over the past several years, there have been many publicized incidents in which high profile organizations have unknowingly leaked confidential information contained in hidden information within their Microsoft[®] Word documents. This hidden information known as metadata, has increasingly become a problem in the legal industry as firms must ensure that the sensitive information contained in their documents is fully protected.

The Problem

Gibbons, Del Deo, Dolan, Griffinger and Vecchione, PC, a firm specializing in transactional, litigation and counseling services, located in Newark, New Jersey and New York City, was aware of the issues surrounding metadata in Microsoft Word documents. The firm had several close calls with documents containing revealing metadata being sent to external parties and knew it had to address this problem.

Although fully aware of the dangers of metadata with using the Track Changes feature found in Microsoft Word, Gibbons used the feature to compare changes in its documents because there was no suitable alternative. Later, with the purchase and implementation of Workshare's document comparison application, Workshare[®] DeltaView[®] the firm instituted a "no track changes policy" to help reduce the risk of metadata in its documents.

"Our end users at Gibbons definitely had a track changes mentality," explained Michael Aginsky, Software Applications Manager at Gibbons. "We really couldn't tell our users not to use Track Changes because there was no alternative for comparing documents. With our purchase of Workshare DeltaView, we were then able to require our users to stop using Track Changes and reduce our risks."

The Search

Realizing the implications of leaving the firm's documents unprotected against metadata, Lois Horwitz, Chief Information Officer at Gibbons, asked Aginsky to begin evaluating the various metadata solutions available on the market. Finding an application that was cost effective, easy to use and could seamlessly integrate with the firm's existing applications were the top criteria in Aginsky's search. With those requirements in mind, he first evaluated Metadata Assistant, one of the pioneering metadata applications produced by Payne Consulting.

"We evaluated Payne Consulting's Metadata Assistant when it first became available and while it was still free," explained Aginsky. "The problem with Payne's utility was that it gave the end user too many choices in which types of metadata to be removed. An attorney should not have to be concerned with something like this."

Not satisfied with Payne Consulting's metadata product, Aginsky, a VBA developer himself, took on

the task of creating a customized solution for the firm. Due to a pending desktop upgrade within the firm however, the project was temporarily tabled until the upgrade was completed.

The Solution

Aginsky first saw Workshare® Metawall™ during the launch of the product at a legal technology show in the summer of 2002. After Gibbon's positive experience with Workshare DeltaView, Aginsky was anxious to see Workshare's new metadata product. After a short evaluation, Aginsky knew that Workshare Metawall was the desired metadata solution.

"Workshare Metawall was the right product for Gibbons because it had all the metadata stripping functionality we needed for the right price," explained Aginsky. "As part of the product's Early Success Program, the firm was able to evaluate the product and give suggestions for new features for future versions of the product."

One of the most important features of the product for Gibbons was the ability to disable the end user's choice of which pieces of metadata to be removed from a document. For Aginsky, this feature was crucial to comply with the firm's policy that all types of metadata should be removed from documents being sent externally.

"Workshare Metawall perfectly suits our needs because it allows us to hide the cleaning options from the user," remarked Aginsky. "We don't want our attorneys to have to worry about which types of metadata they need to remove. With Workshare Metawall nothing is left to chance. Our users don't have to decide whether or not to clean a document. When they are ready to send an email, the product's integration with Microsoft® Outlook automatically asks them if they want to clean the document before sending it out externally. It gives both the IT department and the attorneys a peace of mind in knowing that they always have the cleansing ability available to them," Aginsky continued.

Another important feature of the product for Gibbons was the automation of the cleansing process when sending out a document externally. The product's automatic prompting for the user to cleanse the document provides the firm with an extra layer of document security.

"With Workshare Metawall it's just a matter of an automatic prompt and then two quick clicks to remove the metadata from a document before being emailed with Microsoft Outlook," remarked Aginsky. "We wanted this process to be as easy and as automated as possible for our users. This automation ensures that no documents slip through the cracks and are sent out containing metadata."

Support

During the pre and post sales process of Gibbon's purchase of Workshare Metawall, the firm had an overwhelmingly positive experience in working with Workshare. Workshare's Sales and Technical Team were able to quickly address any issues that arose during Gibbon's evaluation.

"Workshare was very accommodating with us during our evaluation and purchase of Workshare Metawall," explained Aginsky. "All our questions and issues were addressed immediately. As part of the product's Early Success Program, we even had direct input on what we would like to see in new versions of the product."

Conclusion

As a law firm's intellectual property is contained in the documents it produces, solving issues such as unwanted metadata is mission critical. With Workshare Metawall, Gibbons was able to solve this problem with a customized solution that left nothing to chance. Now the firm is confident in knowing that all of its documents being sent externally will be free of potentially harmful metadata. The right functionality coupled with a highly competitive price made Workshare Metawall the right solution.

