Workshare Professional 10.2

Configuration Options

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Workshare Configuration Parameters

The configuration parameters for Workshare Professional, Workshare Compare and Workshare Protect are in the Workshare Configuration Manager. They are grouped into categories and sub-categories as follows:

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Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in the following sections.

Protection > Administration

The **Protection > Administration** parameters enable you to specify how Workshare Protect functions in specific situations.

The **Protection > Administration** parameters are described in the following table:

Parameter	Description	Default
Apply Workshare Protect	If selected, Workshare Protect will check emails and their attachments to see if they breach any security policies.	Internal: Not selected External: Selected
Detect Workshare styles	If selected, Workshare Protect will check emails and their attachments to see if they include any Workshare styles. Workshare styles are applied to changes in a Redline document.	Internal: Not selected External: Not selected

Parameter	Description	Default
Allow users to change metadata removal options	Administrator Mode only. If selected, the **Remove Comments** and the **Remove Track Changes** checkboxes as well as the **Office Metadata** and **PDF Metadata** tabs are available in the *Advanced Email Security Options* dialog. These options enable the user to specify exactly which hidden data types to remove from an attachment. This parameter has no effect on the *Protect Profile* dialog or Interactive Protect panel.	Selected
Allow users to change PDF options	Administrator Mode only. If selected, the **Convert to PDF** checkbox as well as the **Convert to PDF** tab are available in the *Advanced Email Security Options* dialog. These options enable the user to specify whether or not to convert an attachment to PDF and what, if any, PDF security settings to apply. This parameter has no effect on the *Protect Profile* dialog or Interactive Protect panel.	Selected
Allow users to skip metadata removal	Administrator Mode only. If selected, the **Skip Cleaning** checkbox is enabled in the *Advanced Email Security Options* dialog, the **Send without processing** option is available in the *Protect Profile* dialog and the **Remove metadata** checkbox is enabled in the Interactive Protect panel. In the *Advanced Email Security Options* dialog and the Interactive Protect panel, this option enables the user to omit all metadata cleaning. In the *Protect Profile* dialog, this option enables the user to skip all processing, for example, all metadata cleaning and PDF conversion.	Selected
Cache distribution lists	If selected, once Workshare Protect has resolved a distribution list (determined if it should be treated as external or internal), the results are stored locally. In this way, when the distribution list is used again, Workshare Protect can quickly determine whether to treat the email as internal or external. In addition, if this parameter is selected, when Microsoft Outlook is launched, Workshare Protect will resolve all distribution lists in the global address book and store the results. This is done in the background.	Not selected
Cache distribution lists refresh rate (days)	This parameter is relevant when the **Cache distribution lists** parameter is selected. The results from resolving distribution lists are refreshed after the specified number of days.	30

Parameter	Description	Default
Content risk runtime policy path (this overrides the default path)	Administrator Mode only. If specified, Workshare will use this policy when discovering content risk in open Office documents. This is relevant when the default policy is not used and customized policies have been created using the Workshare Policy Designer. *Note: If you use a personalized company profile and you do not want the default profile to exist as well, you should also deselect the **Enable automatic generation of default profile** parameter.*	
Display Advanced Options	If selected, the **Advanced Options** link is enabled in the *Protect Profile* dialog providing access to the *Advanced Email Security Options* dialog.	Selected
Display progress bar on Send	If selected, a progress bar appears when cleaning and sending an email.	Selected
Display Send with Protect button (Outlook)	If selected, a **Send and Protect** button is displayed in email messages. Clicking this button enables the user to always access the *Advanced Email Security Options* dialog (regardless of policy settings) and specify cleaning or converting to PDF of attachments as required.	Not selected
Enable automatic generation of default profile	If selected, the default profile is regenerated when a value is changed in the Registry for an option in the Protection category. This change may be as a result of a manual change made in the Registry or by changing and applying a parameter value in the Protection category of the Workshare Configuration Manager. Additionally, the default profile is also regenerated when the Workshare Configuration Assistant is run. You may want to deselect this parameter if you want to deploy a personalized company profile and you do not want the default profile to exist as well.	Selected
Enable Lightspeed Clean	If selected, when an email or its attachment triggers a Clean action, Workshare Protect will perform a Lightspeed clean. This type of cleaning is faster than a regular clean.	Selected

Parameter	Description	Default
Enable Secure File Transfer when sending emails	If selected, the Secure File Transfer profiles are available in the *Protect Profile* dialog and users can securely send files by replacing attachments with a link to the documents in Workshare online. This parameter has no effect on the Interactive Protect panel.	Selected
Internal Domain List (Lotus Notes)	In multi-domain Notes environments, specify the domain names of all internal servers to ensure that internal/external resolution works correctly. Separate each domain name with a semicolon.	
Proxy address	The URL of an Internet proxy server (if used).	
Proxy password	The password to access an Internet proxy server (if used).	
Proxy port	The port of an Internet proxy server (if used).	
Proxy username	The user name to access an Internet proxy server (if used).	
Report on content policy violations	If selected, Workshare will search for specific text or patterns of text in the body of a document. This is only relevant if you are working with custom policies built using the Workshare Policy Designer.	Not selected
Server Profile Distribution List	The name of the distribution list on Microsoft Exchange Server that is used to return the correct Workshare Protect Server profile email addresses. This is only relevant when selecting **Protect Profile dialog using server profiles** as the value for the **When sending an email with attachments show** parameter.	ProtectServer _Profiles
Show Default profile in Protect Profile dialog	If selected, the default profile is available in the *Protect Profile* dialog.	Selected
Treat footnotes as metadata	If selected, footnotes are also treated as hidden data. You will be able to see details of the footnotes in a document in the content risk report.	Not selected

Parameter	Description	Default
Treat the specified addresses as internal (Outlook)	You can specify any email addresses/distribution lists/domains here that you would like to be treated as internal for the purpose of Workshare Protect applying policies. Separate multiple addresses with a semicolon. For example, **john@yahoo.com; *@hotmail.com** will mean that emails to john's individual yahoo email address are treated as internal as well as emails to any hotmail addresses.	
Use proxy server	If selected, a proxy server (as specified in the parameters above) is used for connecting to the Internet.	Not selected
When sending an email with attachments show	Shows the required behavior when Workshare Protect is enabled. Options are: • **Interactive Protect**: The Interactive Protect panel is displayed in the email message window as soon as attachments are added providing options to clean attachments, convert them to PDF and compress them as well as securely transfer the attachments to Workshare online. *Note: The Interactive Panel is displayed for all emails with attachments regardless of your selection for the **Apply Workshare Protect** parameter.* • **Protect Profile dialog using desktop profiles**: The *Protect Profile* dialog is displayed after clicking Send. It provides a list of profiles available locally. • **Protect Profile dialog using server profiles**: The *Protect Profile* dialog is displayed after clicking Send. It provides a list of profiles available on Workshare Protect. • **Email security dialog for all mail**: The *Advanced Email Security Options* dialog is always displayed. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. • **Email security dialog for internal mail only**: The *Advanced Email Security Options* dialog is displayed when an email has internal recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to external recipients only, the *Advanced Email Security Options* dialog is not displayed. This is only relevant when **Apply Workshare Protect** is selected for Internal Email.	Interactive Protect In IBM Notes environments, the default setting is Protect Profile dialog using desktop profiles.

Parameter	Description	Default
	• **Email security dialog for external mail only**: The *Advanced Email Security Options* dialog is displayed when an email has external recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to internal recipients only, the *Advanced Email Security Options* dialog is not displayed. This is only relevant when **Apply Workshare Protect** is selected for External Email. • **No dialog (process actions transparently)**: The *Advanced Email Security Options* dialog is not displayed. Workshare Protect processes the email and applies the default profile without any user intervention.	

Protection > Sharing

The **Protection > Sharing** parameters enable you to configure how Workshare Protect uploads attachments to Workshare online.

The **Protection > Sharing** parameters are described in the following table:

Parameter	Description	Default
Automatically convert to link(s) when total attachment size exceeds (MB)	When attachments exceed the size specified then they will automatically be converted to links. This means the attachments will be saved to a folder in Workshare and recipients receive a link to that folder. The user will see the link in the body of their email. They can still select to clean/convert/compress the attachment. Only when they click Send will the link be sent to the recipient. *Note: This option works as described regardless as to how Protect is configured.*	
Display Attach as Link button (Outlook)	If selected, the **Attach as Link** button is displayed in email messages. Clicking this button enables the user to use the sharing functionality to send a link to a large file when it cannot be sent by email. (Your administrator may set a limit on the size of files you can email to avoid large files blocking Exchange.)	Selected
Display Link on attachments bar	If selected, users can always click **Link** on their attachments bar to convert their attachments to links. The attachments will be saved to a folder in Workshare and recipients will receive a link to that folder. The user can still select to clean/convert/compress the attachment. Only when they click Send will the link be sent to the recipient. *Note: This option works as described regardless as to how Protect is configured.*	Not selected
Display Manage Permissions on attachments bar	If selected, when attachments have been converted to links, a **Manage Permissions** option is displayed on the attachments bar. Clicking this option enables the user to set access permissions to the attachment(s) in Workshare. For example, you could set an expiry date so the files are only available for a limited time.	Selected

Parameter	Description	Default
Enable Workshare Connect – real time collaboration	If selected, the save and share to Workshare online options (**Sharing** group) are available in the Workshare tab in Office.	Selected
Ignore these Bcc addresses	When attachments are uploaded to Workshare online, ALL recipients (including Bcc recipients) receive an email with a link to the attachments. Bcc recipients therefore do not remain hidden from other recipients. If no email addresses are specified for this parameter, when an email includes a Bcc address, Workshare prompts the sender to remove the Bcc address, as it will not remain hidden. If email addresses are specified here, when they appear in the Bcc field, Workshare will not prompt but will treat the email addresses as ordinary recipients. Separate multiple addresses with a semicolon. For example, **john@yahoo.com; *@hotmail.com** will mean that when john's individual yahoo email address or any hotmail addresses appear in the Bcc field, Workshare will not prompt the sender to remove the Bcc address but will treat the email addresses as ordinary recipients.	
Retain attachments in Sent Item	If selected, when an attachment is replaced with a link to the file in Workshare, the email saved in the senders Sent folder includes the actual document attachment.	Not selected
Select 'Retain attachments in Sent Item' by default (Interactive Protect only)	Administrator Mode only. If selected, the **Retain attachments in Sent Item** parameter is selected by default.	Not selected
Share email body prefix	The text included in the body of the email sent when sharing an attachment from Interactive Protect.	I've shared a file with you:
Share email body prefix (multiple files)	The text included in the body of the email sent when sharing multiple attachments from Interactive Protect.	I've shared files with you:
SSO Domain Name	The domain name used for single sign on to Workshare.	

Parameter	Description	Default
Workshare user login email	User Mode only. The email address used for the login to your Workshare account.	

Protection > Interactive Protect

The **Protection > Interactive Protect** parameters enable you to configure how the Interactive Protect panel will appear to users.

The parameters in the top half enable you to specify what metadata should be visible in the Interactive Protect panel and what metadata is cleaned by default.

The parameters in the lower half enable you to specify whether users will be able to access and modify settings in the Interactive Protect panel.

Tip! *You can select all parameters in a column by selecting the checkbox in the column header and then deselect one or two metadata parameters within that column as required.*

The **Protection > Interactive Protect** parameters are described in the following table:

Parameter	Description	Default
Accept changes and turn off Track Changes (Word and Excel)	Microsoft Word and Excel. If selected, accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked.	Visible, No clean
Convert attached template to Normal (Word)	Microsoft Word only. If selected, converts the attached template to normal.dot. Automatic style updating is disabled before the template is removed. Therefore the formatting and styles in your document will not be affected by removing the attached template.	Visible, Clean
Convert field codes to text (Office)	Microsoft Word, Excel and PowerPoint. If selected, converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index. In Microsoft Excel and PowerPoint, hyperlinks are converted to text. *Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.* This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed. *Note: You can prevent certain field codes from being cleaned, for example, table of contents or page numbers, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Visible, Clean
Delete attachments (PDF)	PDF only. If selected, removes any attachments to a PDF file. PDF attachments are separate files attached to a PDF file generally or linked to a specific point in a PDF file. Selecting this option will only remove the first type of attachment. Attachments linked to a specific point in a PDF file are treated as markups and will only be removed if the **Delete markups** parameter is selected.	Visible, Clean
Delete bookmarks (PDF)	PDF only. If selected, removes any bookmarks in a PDF file.	Visible, Clean

Parameter	Description	Default
Delete built-in properties (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number.	Visible, Clean
Delete comments (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document.	Visible, No clean
Delete custom properties (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document. *Note: You can prevent certain custom properties from being cleaned, for example, DMS Doc ID Properties, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Visible, Clean
Delete custom XML parts (Word)	Microsoft Word only. If selected, removes custom XML parts (embedded XML data) from a document.	Invisible, No clean
Delete document reviewers (Word)	Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed. *Note: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.*	Visible, Clean

Parameter	Description	Default
Delete document variables (Word)	Microsoft Word only. If selected, deletes all document variables. Document variables are values stored in Microsoft Word documents that are used by either field codes or macros. These variables may contain confidential information like company names, or file locations. Even if field codes and macros are removed, the variables used may remain in the document. Variables can be viewed in Microsoft Word in the Visual Basic Editor.	Visible, Clean
Delete footers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. If selected, removes any footers included in the sheet or slide.	Visible, Clean
Delete footnotes (Word)	Microsoft Word only. If selected, removes any footnotes or endnotes included in the document.	Visible, No clean
Delete headers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. If selected, removes any headers included in the sheet or slide.	Visible, Clean
Delete hidden slides (PowerPoint)	Microsoft PowerPoint only. If selected, removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information.	Visible, Clean
Delete hidden text (Word)	Microsoft Word only. If selected, removes all text that has been formatted as hidden.	Visible, Clean
Delete links (Excel)	Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links: Link to a cell in another Microsoft Excel document. Named link to a named reference in another Microsoft Excel document. Link to another document. OLE link that inserts another document as an icon. OLE link that inserts another document as text.	Visible, Clean

Parameter	Description	Default
Delete macros (Word and Excel)	Microsoft Word and Excel. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.	Visible, Clean
Delete markup annotations (PDF)	PDF only. If selected, removes any markup in a PDF file. Markup is a tool used to make comments and annotations to PDF documents. *Note: You can prevent certain markup annotations from being cleaned, for example, Highlight annotations or Strike Out annotations, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Visible, Clean
Delete previous authors (Word)	Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations. This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.	Visible, Clean
Delete properties (PDF)	PDF only. If selected, removes properties in a PDF file. Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base. *Note: Removing properties from a PDF/A file will disable its PDF/A status.*	Visible, No clean
Delete routing slip (Word and Excel 2003)	Microsoft Word and Excel. If selected, removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information, such as recipients, subject and introduction, which are used when sending to a mail recipient. Routing slips are not supported in Microsoft Office 2007 and above.	Visible, Clean

Parameter	Description	Default
Delete Smart Tags (Word 2003/2007)	Microsoft Word only. If selected, removes smart tags from Microsoft Word documents. Smart tags are added to your documents as you create them if the option is enabled. These tags are linked to particular text in a document, such as a name, and allow you to perform certain actions by selecting the link associated with the text. Depending on the smart tag functions you use, they may embed extra hidden information in your document. Smart tags only exist in Microsoft Office XP to 2010.	Visible, Clean
Delete Speaker Notes (PowerPoint)	Microsoft PowerPoint only. If selected, deletes all text that appears on the Notes Page in a Microsoft PowerPoint presentation. This is usually used by speakers to remind them of points during a presentation. You may want to remove speaker notes before distributing a presentation, as they are not usually intended for others to read.	Visible, Clean
Delete text smaller than 5pt (Word)	Microsoft Word only. If selected, removes all text that has been formatted with a font size less that 5pt (i.e. 4pt and less).	Visible, No clean
Delete versions (Word 2003)	Microsoft Word only. If selected, removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document. Document versions are not supported in Microsoft Word 2007 and above.	Visible, Clean
Delete white text on white background (Word)	Microsoft Word only. Removes all text with a white font that has been formatted with a white background color.	Visible, No clean
Reset document statistics (Word)	Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates. *Note: This information cannot be cleaned from within Microsoft Word.*	Visible, Clean

Parameter	Description	Default
Turn off versioning (Word 2003)	Microsoft Word only. If selected, turns off the flag to automatically save a new version of the document every time the document is closed. This applies to local file systems only. Versions can still be saved manually by saving a file with a different name. Versioning is not supported in Microsoft Word 2007 and above.	Visible, Clean
Allow users to change metadata removal options	Administrator Mode only. If selected, users can modify the individual metadata options selected in the **Clean files** section of the Interactive Protect panel.	Selected
Allow users to change PDF options	Administrator Mode only. If selected, users can modify the individual pdf options selected in the **Convert to PDF** section of the Interactive Protect panel.	Selected
Allow users to compress to zip	Administrator Mode only. If selected, the **Compress all to zip** section is visible to the user in the Interactive Protect panel.	Selected
Allow users to convert to pdf	Administrator Mode only. If selected, the **Convert to PDF** section is visible to the user in the Interactive Protect panel.	Selected
Allow users to share files on Workshare	Administrator Mode only. If selected, the **Convert to link** section is visible to the user in the Interactive Protect panel.	Selected
Auto apply on send for external emails	Administrator Mode only. If selected, when a user does NOT click **Apply** in the Interactive Protect panel, the Interactive Protect settings from the Interactive Protect panel will still be applied when the user clicks Send. This parameter applies to external emails only. If not selected and the user forgets to click **Apply** before sending an external email, the email is sent without processing by Protect.	Selected

Parameter	Description	Default
Auto apply on send for internal emails	Administrator Mode only. If selected, when a user does NOT click **Apply** in the Interactive Protect panel, the Interactive Protect settings from the Interactive Protect panel will still be applied when the user clicks Send. This parameter applies to internal emails only. If not selected and the user forgets to click **Apply** before sending an internal email, the email is sent without processing by Protect.	Not selected
Automatically select 'Convert to link' when total attachment size exceeds (MB)	Administrator Mode only. When attachments exceed the size specified then the **Replace all attachments with a link** checkbox in the Interactive Protect panel will be selected by default.	
Automatically show panel when:	Administrator Mode only. Determines when the Interactive Protect panel will be automatically displayed in an email window. The options are: **Any attachment is added**, **Metadata is detected**, **Always**, **Never**. *Note: If the Interactive Protect panel is set to never open automatically, users can display it by clicking the notification across the top of the email window or click **Protect Files** in the Message tab.*	Any attachment is added
Convert attachments to PDF	Administrator Mode only. If selected, the **Convert selected file(s)** checkbox in the **Convert to PDF** section of the Interactive Protect panel is selected by default.	Not selected
Default for 'Set an access expiry date' (days)	Administrator Mode only. When a number is specified, the **Set an access expiry date** checkbox in the Interactive Protect panel will be selected by default and the expiry date will be set to the specified number of days after today.	
Display progress when auto-applying on send	Administrator Mode only. If selected, when either of the **Auto apply…** parameters are selected and the Interactive Protect settings are automatically applied when the user clicks Send, a progress bar is displayed.	Selected

Parameter	Description	Default
Select 'Get return receipt' checkbox by default	Administrator Mode only. If selected, the **Get return receipt** checkbox in the **Convert to link** section of the Interactive Protect panel is selected by default.	Not selected
Select 'Recipients can download files' checkbox by default	Administrator Mode only. If selected, the **Recipients can download files** checkbox in the **Convert to link** section of the Interactive Protect panel is selected by default.	Selected
Select 'Recipients can invite others to this folder' checkbox by default	Administrator Mode only. If selected, the **Recipients can invite others to this folder** checkbox in the **Convert to link** section of the Interactive Protect panel is selected by default.	Selected
Select 'Recipients must login to access files' checkbox by default	Administrator Mode only. If selected, the **Recipients must login to access files** checkbox in the **Convert to link** section of the Interactive Protect panel is selected by default.	Selected
Select 'Remove metadata' checkbox by default	Administrator Mode only. If selected, the **Remove metadata** checkbox in the **Clean files** section of the Interactive Protect panel is selected by default.	Selected

Protection > Remove Metadata

The **Protection > Remove Metadata** parameters enable you to modify the default metadata removal policy, which Workshare Protect applies in the following situations:

- When discovering and removing content risk from Open Microsoft Office documents
- When Workshare Protect is configured to use the *Advanced Email Security Options* dialog (internal and/or external email)
- When Workshare Protect is configured to use the *Protect Profile* dialog (if the user selects the default profile)

> *Note: The default policy is NOT applied when Workshare Protect is configured to use the Interactive Protect panel.*

The parameters in this category list the types of metadata that can be removed by Workshare Protect. To select a metadata type, you select the checkbox to the right of the parameter in the relevant column – **Internal Email**, **External Email**, **Content Risk**.

> *Tip! You can select all parameters in a column by selecting the checkbox in the column header and then deselect one or two metadata parameters within that column as required.*

Remove Metadata

Specify what hidden data is removed from email attachments sent internally and externally and from open Microsoft Office documents.

	Internal Email	External Email	Content Risk
Accept changes and turn off Track Changes (Word and Excel)	🔓 ☐	🔓 ☐	🔓 ☐
Convert attached template to Normal (Word)	🔓 ☑	🔓 ☑	🔓 ☑
Convert field codes to text (Office)	🔓 ☑	🔓 ☑	🔓 ☑
Delete attachments (PDF)	🔓 ☑	🔓 ☑	
Delete bookmarks (PDF)	🔓 ☑	🔓 ☑	
Delete built-in properties (Office)	🔓 ☑	🔓 ☑	🔓 ☑
Delete comments (Office)	🔓 ☐	🔓 ☐	🔓 ☐
Delete custom properties (Office)	🔓 ☑	🔓 ☑	🔓 ☑
Delete custom XML parts (Word)	🔓 ☐	🔓 ☐	🔓 ☐
Delete document reviewers (Word)	🔓 ☑	🔓 ☑	🔓 ☑
Delete document variables (Word)	🔓 ☑	🔓 ☑	🔓 ☑
Delete footers (Excel and PowerPoint)	🔓 ☑	🔓 ☑	🔓 ☑
Delete footnotes (Word)	🔓 ☐	🔓 ☐	🔓 ☐
Delete headers (Excel and PowerPoint)	🔓 ☑	🔓 ☑	🔓 ☑
Delete hidden slides (PowerPoint)	🔓 ☑	🔓 ☑	🔓 ☑
Delete hidden text (Word)	🔓 ☑	🔓 ☑	🔓 ☑
Delete links (Excel)	🔓 ☑	🔓 ☑	🔓 ☑
Delete macros (Word and Excel)	🔓 ☑	🔓 ☑	🔓 ☑

The **Protection > Remove Metadata** parameters are described in the following table:

Parameter	Description	Default
Accept changes and turn off Track Changes (Word and Excel)	Microsoft Word and Excel. If selected, accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked.	Internal: Not selected External: Not selected Content Risk: Not selected
Convert attached template to Normal (Word)	Microsoft Word only. If selected, converts the attached template to normal.dot. Automatic style updating is disabled before the template is removed. Therefore the formatting and styles in your document will not be affected by removing the attached template.	Internal: Selected External: Selected Content Risk: Selected
Convert field codes to text (Office)	Microsoft Word, Excel and PowerPoint. If selected, converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index. In Microsoft Excel and PowerPoint, hyperlinks are converted to text. *Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.* This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed. *Note: You can prevent certain field codes from being cleaned, for example, table of contents or page numbers, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Internal: Selected External: Selected Content Risk: Selected
Delete attachments (PDF)	PDF only. If selected, removes any attachments to a PDF file. PDF attachments are separate files attached to a PDF file generally or linked to a specific point in a PDF file. Selecting this option will only remove the first type of attachment. Attachments linked to a specific point in a PDF file are treated as markups and will only be removed if the **Delete markups** parameter is selected.	Internal: Selected External: Selected

Parameter	Description	Default
Delete bookmarks (PDF)	PDF only. If selected, removes any bookmarks in a PDF file.	Internal: Selected External: Selected
Delete built-in properties (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number.	Internal: Selected External: Selected Content Risk: Selected
Delete comments (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document.	Internal: Not selected External: Not selected Content Risk: Not selected
Delete custom properties (Office)	Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document. *Note: You can prevent certain custom properties from being cleaned, for example, DMS Doc ID Properties, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Internal: Selected External: Selected Content Risk: Selected
Delete custom XML parts (Word)	Microsoft Word only. If selected, removes custom XML parts (embedded XML data) from a document.	Invisible, No clean
Delete document reviewers (Word)	Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed. *Note: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.*	Internal: Selected External: Selected Content Risk: Selected

Parameter	Description	Default
Delete document variables (Word)	Microsoft Word only. If selected, deletes all document variables. Document variables are values stored in Microsoft Word documents that are used by either field codes or macros. These variables may contain confidential information like company names, or file locations. Even if field codes and macros are removed, the variables used may remain in the document. Variables can be viewed in Microsoft Word in the Visual Basic Editor.	Internal: Selected External: Selected Content Risk: Selected
Delete footers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. If selected, removes any footers included in the sheet or slide.	Internal: Selected External: Selected Content Risk: Selected
Delete footnotes (Word)	Microsoft Word only. If selected, removes any footnotes or endnotes included in the document.	Internal: Not selected External: Not selected Content Risk: Not selected
Delete headers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. If selected, removes any headers included in the sheet or slide.	Internal: Selected External: Selected Content Risk: Selected
Delete hidden slides (PowerPoint)	Microsoft PowerPoint only. If selected, removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information.	Internal: Selected External: Selected Content Risk: Selected
Delete hidden text (Word)	Microsoft Word only. If selected, removes all text that has been formatted as hidden.	Internal: Selected External: Selected Content Risk: Selected

Parameter	Description	Default
Delete links (Excel)	Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links: Link to a cell in another Microsoft Excel document. Named link to a named reference in another Microsoft Excel document. Link to another document. OLE link that inserts another document as an icon. OLE link that inserts another document as text.	Internal: Selected External: Selected Content Risk: Selected
Delete macros (Word and Excel)	Microsoft Word and Excel. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.	Internal: Selected External: Selected Content Risk: Selected
Delete markup annotations (PDF)	PDF only. If selected, removes any markup in a PDF file. Markup is a tool used to make comments and annotations to PDF documents. <hr>*Note: You can prevent certain markup annotations from being cleaned, for example, Highlight annotations or Strike Out annotations, by selecting them in the **Protection > Exclude Metadata** category. Refer to page 28.*	Internal: Selected External: Selected
Delete previous authors (Word)	Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations. This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.	Internal: Selected External: Selected Content Risk: Selected
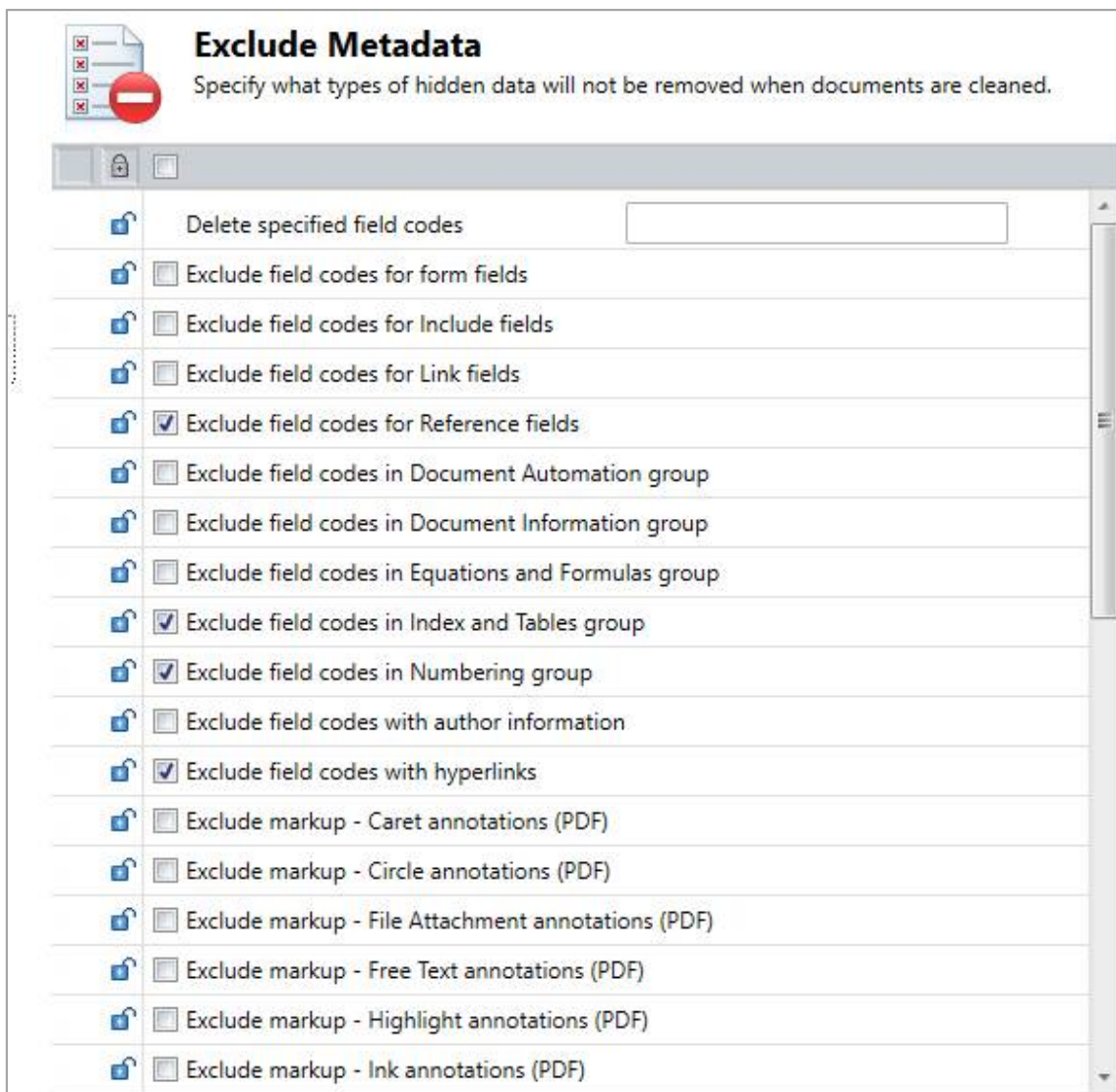
Parameter	Description	Default
Delete properties (PDF)	PDF only. If selected, removes properties in a PDF file. Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base. *Note: Removing properties from a PDF/A file will disable its PDF/A status.*	Internal: Not selected External: Not selected
Delete routing slip (Word and Excel 2003)	Microsoft Word and Excel. If selected, removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information, such as recipients, subject and introduction, which are used when sending to a mail recipient. Routing slips are not supported in Microsoft Office 2007 and above.	Internal: Selected External: Selected Content Risk: Selected
Delete Smart Tags (Word 2003/2007)	Microsoft Word only. If selected, removes smart tags from Microsoft Word documents. Smart tags are added to your documents as you create them if the option is enabled. These tags are linked to particular text in a document, such as a name, and allow you to perform certain actions by selecting the link associated with the text. Depending on the smart tag functions you use, they may embed extra hidden information in your document. Smart tags only exist in Microsoft Office XP to 2010.	Internal: Selected External: Selected Content Risk: Selected
Delete Speaker Notes (PowerPoint)	Microsoft PowerPoint only. If selected, deletes all text that appears on the Notes Page in a Microsoft PowerPoint presentation. This is usually used by speakers to remind them of points during a presentation. You may want to remove speaker notes before distributing a presentation, as they are not usually intended for others to read.	Internal: Selected External: Selected Content Risk: Selected
Delete text smaller than 5pt (Word)	Microsoft Word only. If selected, removes all text that has been formatted with a font size less that 5pt (i.e. 4pt and less).	Internal: Not selected External: Not selected Content Risk: Not selected

Parameter	Description	Default
Delete versions (Word 2003)	Microsoft Word only. If selected, removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document. Document versions are not supported in Microsoft Word 2007 and above.	Internal: Selected External: Selected Content Risk: Selected
Delete white text on white background (Word)	Microsoft Word only. Removes all text with a white font that has been formatted with a white background color.	Internal: Not selected External: Not selected Content Risk: Not selected
Reset document statistics (Word)	Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates. *Note: This information cannot be cleaned from within Microsoft Word.*	Internal: Selected External: Selected Content Risk: Selected
Turn off versioning (Word 2003)	Microsoft Word only. If selected, turns off the flag to automatically save a new version of the document every time the document is closed. This applies to local file systems only. Versions can still be saved manually by saving a file with a different name. Versioning is not supported in Microsoft Word 2007 and above.	Internal: Selected External: Selected Content Risk: Selected

Protection > Exclude Metadata

The **Protection** > **Exclude Metadata** parameters enable you to exclude certain types of metadata from being removed when documents are cleaned. The types of metadata that can be excluded from cleaning are custom properties and field codes from Office documents and markups from PDF files. When cleaning, the user can still select to clean these types of metadata and all custom properties, field codes or markups will be cleaned, except for the ones explicitly excluded here. These parameters apply when Workshare Protect is cleaning attachments as well as cleaning open Microsoft Office documents.

> *Note: When field codes are cleaned, the text is not removed. The field code is simply unlinked so that it is not updated in the future. For example, if you have a table of contents field code. Unlinking it keeps the table of contents in your document, but you are unable to update the table of contents, as it is no longer a field; it is only text.*

Exclude Metadata

Specify what types of hidden data will not be removed when documents are cleaned.

🔓		Delete specified field codes
🔓	☐	Exclude field codes for form fields
🔓	☐	Exclude field codes for Include fields
🔓	☐	Exclude field codes for Link fields
🔓	☑	Exclude field codes for Reference fields
🔓	☐	Exclude field codes in Document Automation group
🔓	☐	Exclude field codes in Document Information group
🔓	☐	Exclude field codes in Equations and Formulas group
🔓	☑	Exclude field codes in Index and Tables group
🔓	☑	Exclude field codes in Numbering group
🔓	☐	Exclude field codes with author information
🔓	☑	Exclude field codes with hyperlinks
🔓	☐	Exclude markup - Caret annotations (PDF)
🔓	☐	Exclude markup - Circle annotations (PDF)
🔓	☐	Exclude markup - File Attachment annotations (PDF)
🔓	☐	Exclude markup - Free Text annotations (PDF)
🔓	☐	Exclude markup - Highlight annotations (PDF)
🔓	☐	Exclude markup - Ink annotations (PDF)

The **Protection** > **Exclude Metadata** parameters which apply to all cleaning (internal email, external email and open documents) are described in the following table:

Parameter	Description	Default
Delete specified field codes	Microsoft Word only. Workshare Protect is configured to replace field codes with static text. However, by entering the field codes in this parameter, Workshare Protect will delete any instances of these field codes. To delete specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code, separate them with a semicolon.	
Exclude field codes for form fields	Microsoft Word only. These are field codes that are used in forms, for example, dropdown lists and text boxes. If selected, any form field codes are not cleaned. By default, these field codes are not excluded and therefore form fields are unlinked during cleaning.	Not Selected
Exclude field codes for Include fields	Microsoft Word only. These are field codes that include text or pictures from other sources. If selected, any 'include' field codes are not cleaned. By default, these field codes are not excluded and therefore 'include' fields are unlinked during cleaning.	Not selected
Exclude field codes for Link fields	Microsoft Word only. These are field codes for linked or imported objects. If selected, the links are not removed and therefore still update from the source. By default, these field codes are not excluded and therefore links are unlinked during cleaning.	Not selected
Exclude field codes for Reference fields	Microsoft Word only. These are field codes for any references within the document, for example, page references. If not selected, references are unlinked and therefore no longer automatically updated. By default, these field codes are excluded and therefore any references in your document remain fully functional.	Selected

Parameter	Description	Default
Exclude field codes in Document Automation group	Microsoft Word only. These are field codes used to provide functions within a document, for example, macro buttons, mail merge functions, print functionality. If selected, these field codes remain linked which means the document automation features continue to work. By default these field codes are not excluded, and therefore document automation features are unlinked during cleaning.	Not selected
Exclude field codes in Document Information group	Microsoft Word only. These are field codes that reference any of the document properties, for example, subject and keywords, as well as any field codes that reference the document statistics, for example, create date and number of words. If selected, any field codes referencing the document properties or statistics are not cleaned. By default, these field codes are not excluded and therefore document information is unlinked during cleaning.	Not selected
Exclude field codes in Equations and Formulas group	Microsoft Word only. These are field codes for calculations, for example, equations, symbols or formula. If selected, equations remain linked. By default, these field codes are not excluded and therefore any equations are unlinked during cleaning.	Not selected
Exclude field codes in Index and Tables group	Microsoft Word only. These are field codes related to the Table of Contents, Table of Authorities, Glossary, and Index. If not selected, these tables are unlinked, and can therefore no longer be automatically updated. By default, these field codes are excluded and therefore tables and indexes in your document will remain fully functional. *Note: Unlinking a table of contents causes the hyperlinks that reference each section of the document to stop working. It may also change the format of the table of contents to blue underlined text.*	Selected

Parameter	Description	Default
Exclude field codes in Numbering group	Microsoft Word only. These are field codes for numbering within the document, for example, page numbers, list numbers, section numbers. If not selected, these numbers are unlinked and therefore no longer automatically updated. By default, these field codes are excluded and therefore any numbering in your document remains fully functional. *Note: Unlinking page numbers in headers or footers may cause page numbers to be repeated if a header or footer is shared between more than one page of the document.*	Selected
Exclude field codes with author information	Microsoft Word only. These are field codes that include the Author, Last Saved By User, or Current User information. If selected, any field codes referencing the author or user are not cleaned. By default, these field codes are not excluded and therefore author information is unlinked during cleaning.	Not selected
Exclude field codes with hyperlinks	Microsoft Word, Excel and PowerPoint. These are field codes for hyperlinks. If not selected, hyperlinks are unlinked. The text of the link is still visible but the associated address is removed. By default, these field codes are excluded and therefore hyperlinks in your document remain fully functional.	Selected
Exclude markup – Caret annotations	PDF only. Caret annotations are a type of markup used in PDF files. If selected, any caret annotations in PDF files are not cleaned. By default, caret annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected

Parameter	Description	Default
Exclude markup – Circle annotations	PDF only. Circle annotations are a type of markup used in PDF files. If selected, any circle annotations in PDF files are not cleaned. By default, circle annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – File Attachment annotations	PDF only. File attachment annotations are a type of markup used in PDF files. If selected, any file attachment annotations in PDF files are not cleaned. By default, file attachment annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Free Text annotations	PDF only. Free text annotations are a type of markup used in PDF files. If selected, any free text annotations in PDF files are not cleaned. By default, free text annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Highlight annotations	PDF only. Highlight annotations are a type of markup used in PDF files. If selected, any highlight annotations in PDF files are not cleaned. By default, highlight annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Ink annotations	PDF only. Ink annotations are a type of markup used in PDF files. If selected, any ink annotations in PDF files are not cleaned. By default, ink annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected

Parameter	Description	Default
Exclude markup – Line annotations	PDF only. Line annotations are a type of markup used in PDF files. If selected, any line annotations in PDF files are not cleaned. By default, line annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Links annotations	PDF only. Links annotations are a type of markup used in PDF files. If selected, any links annotations in PDF files are not cleaned. By default, links annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Movie and Sound annotations	PDF only. Movie and sound annotations are a type of markup used in PDF files. If selected, any movie and sound annotations in PDF files are not cleaned. By default, movie and sound annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Polygon annotations	PDF only. Polygon annotations are a type of markup used in PDF files. If selected, any polygon annotations in PDF files are not cleaned. By default, polygon annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Polyline annotations	PDF only. Polyline annotations are a type of markup used in PDF files. If selected, any polyline annotations in PDF files are not cleaned. By default, polyline annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected

Parameter	Description	Default
Exclude markup – Popup annotations	PDF only. Popup annotations are a type of markup used in PDF files. If selected, any popup annotations in PDF files are not cleaned. By default, popup annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Redaction annotations	PDF only. Redaction annotations are a type of markup used in PDF files. If selected, any redaction annotations in PDF files are not cleaned. By default, redaction annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Screen annotations	PDF only. Screen annotations are a type of markup used in PDF files. If selected, any screen annotations in PDF files are not cleaned. By default, screen annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Square annotations	PDF only. Square annotations are a type of markup used in PDF files. If selected, any square annotations in PDF files are not cleaned. By default, square annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Squiggly annotations	PDF only. Squiggly annotations are a type of markup used in PDF files. If selected, any squiggly annotations in PDF files are not cleaned. By default, squiggly annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected

Parameter	Description	Default
Exclude markup – Stamps annotations	PDF only. Stamps annotations are a type of markup used in PDF files. If selected, any stamps annotations in PDF files are not cleaned. By default, stamps annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Strike Out annotations	PDF only. Strike out annotations are a type of markup used in PDF files. If selected, any strike out annotations in PDF files are not cleaned. By default, strike out annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Text annotations	PDF only. Text annotations are a type of markup used in PDF files. If selected, any text annotations in PDF files are not cleaned. By default, text annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Underline annotations	PDF only. Underline annotations are a type of markup used in PDF files. If selected, any underline annotations in PDF files are not cleaned. By default, underline annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected
Exclude markup – Widgets annotations	PDF only. Widgets annotations are a type of markup used in PDF files. If selected, any widgets annotations in PDF files are not cleaned. By default, widgets annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.	Not selected

Parameter	Description	Default
Exclude referenced documents (Lightspeed Clean only)	Microsoft Word only. These are field codes that identify a file to include when you create a table of contents or an index with the TOC, TOA, or Index field. If selected, any Referenced Document (RD) field codes are not cleaned. By default, these field codes are excluded and therefore any RD fields in your document remain fully functional.	Selected
Exclude specified custom properties	Microsoft Word, Excel and PowerPoint. If you have selected to clean custom properties but there are custom properties in your documents that you never want to remove, for example, DMS DocIds, you can exclude them from both cleaning and discovery. To exclude custom properties, add the names of the custom properties to this parameter. If you want to specify more than one custom property, separate them with a semicolon.	
Exclude specified document variables	Microsoft Word only. If you have selected to clean document variables but there are document variables in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude document variables, add the names of the document variable to this parameter. If you want to specify more than one document variable, separate them with a semicolon.	
Exclude specified field codes	Microsoft Word only. If you have selected to clean field codes but there are field codes in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code, separate them with a semicolon.	

Protection > Convert to PDF

The **Protection > Convert to PDF** parameters enable you to specify whether Workshare Protect should convert attachments to PDF as well as set the default security settings applied when Workshare Protect performs conversion to PDF.

The **Protection** > **Convert to PDF** parameters are described in the following table:

Parameter	Description	Default
Convert attachments to PDF	If selected, Microsoft Office documents attached to the email are automatically converted to PDFs when the email is sent.	Internal: Not selected External: Not selected
Clean before PDF	If selected, documents are cleaned before they are converted to PDF according to the parameters selected in **Protection** > **Remove Metadata** (**Content Risk** column).	Not selected

Parameter	Description	Default
Default password to apply PDF security	Administrator Mode Only. The default password required to access PDF security options or to access PDF files when security options are applied.	Contact Workshare Customer Support
Default password to open PDF	The default password required to open PDF files after conversion by Workshare Protect.	
Enable PostScript simulation	If selected, the PostScript simulation option in the printer driver is turned on. This option is relevant when converting documents to PDF that include WordArt and semi-transparent backgrounds.	Not selected
Multilingual Support	If selected, when converting to PDF, Workshare embeds the documents' fonts inside the PDF file. This means a PDF file can always be read even on machines that do not have the fonts of the document. Embedding the fonts into the PDF file will make the PDF file bigger.	Selected
Prohibit comments being added	If selected, the **Prevent comments being added** checkbox in the *PDF Security Settings* dialog is selected by default.	Not selected
Prohibit modification of text	If selected, the **Prevent editing of text** checkbox in the *PDF Security Settings* dialog is selected by default.	Not selected
Prohibit printing	If selected, the **Prevent printing** checkbox in the *PDF Security Settings* dialog is selected by default.	Not selected
Prohibit text or graphics being copied	If selected, the **Prevent the copying of text and/or graphics** checkbox in the *PDF Security Settings* dialog is selected by default.	Not selected
Reconstruct Hyperlinks	If selected, standard URL and bookmark hyperlinks are preserved when converting to PDF. *Note: Selecting the **Reconstruct Hyperlinks** parameter can increase the time it takes to create a PDF document. Hyperlinks that are preserved using this option may not correspond exactly to the location in the original document.*	Not selected
Set PDF/A as default PDF format	If selected, the PDF/A option is selected as the default when converting to PDF.	Not selected

Protection > Compress as Zip

The **Protection > Compress as Zip** parameters enable you to specify whether Workshare Protect should compress attachments into zip files and how it performs this functionality.

The **Protection** > **Compress as Zip** parameters are described in the following table:

Parameter	Description	Default
Zip attachments above specified limit (MB)	The size limit for zipping attachments. If this option is not selected and the text box left blank, no zipping is done. If this option is selected and set to 0, attachments are always zipped (unless they are already zipped). You can also set the value in the text box to a particular size, for example, 2. In this case zipping only occurs if attachments are larger than 2MB. Workshare Protect zips Microsoft Word, Excel and PowerPoint files as well as PDF and RTF files. Each attachment that meets the specified limit is zipped individually and attached to the email instead of the unzipped file.	Internal: 0 External: 0
Apply password when creating zip files	If selected, users are prompted to enter a password whenever attachments are automatically zipped. This option is used in conjunction with the automatic zip options. When this setting is not selected, zip files are not password-protected.	Not selected

Comparison > Administration

The **Comparison > Administration** parameters enable you to specify how Workshare Compare functions in specific situations.

The **Comparison** > **Administration** parameters are described in the following table:

Parameter	Description	Default
Additional locations for rendering sets	Workshare Compare looks in the following two locations to create a list of the possible rendering sets available: %PUBLIC%\Documents\Workshare\Rendering (default public location) %USERPROFILE%\Documents\Workshare\Rendering (default user location). This may be different if the administrator has specified a new default user location for the **Default rendering set location** parameter. To specify other locations, for example, on your network, enter the location in this field. Separate multiple locations with a semicolon.	
Allow users to change email attachment format	Administrator Mode only. If selected, the user can select from different formats for the Redline document when sending a Redline by email.	Selected
Apply Accepted Changes default save location	The default save location of the new Word document that opens with your selected changes accepted, when you click the **Apply Accepted Changes** button in Workshare Compare.	
Compare for PowerPoint – Default report layout	The default report layout when saving a PowerPoint comparison as a PDF. Also, when creating a comparison report after comparing presentations, the default report layout selected. Options are: **Full comparison report**, **Change summary only** or **Slide view only**.	Full comparison report
Compare for PowerPoint – Include unchanged slides	If selected, all slides are included when saving a PowerPoint comparison as a PDF. Also, when creating a comparison report after comparing presentations, the **Include unchanged slides** checkbox is selected by default.	Not selected
Default document open location	The default location when opening saved comparisons using the Open option in Workshare Compare.	

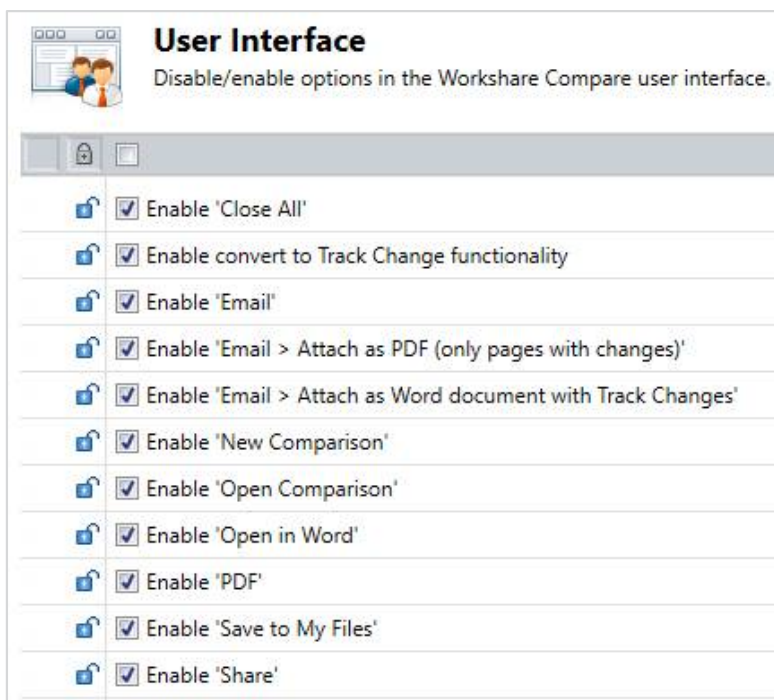| Parameter	Description	Default
Default email attachment format	The default format for the Redline document when sending a Redline by email (DOC, DOCX, TEXT, RTF, WDF or PDF).	Portable Document Format (.pdf)
Default location rendering set	Administrator Mode Only. The default user location where rendering sets are saved.	%USERPROFILE%\ Documents\ Workshare\ Rendering
Default Redline save location	The default location where Redline documents are saved.	
Default rendering set	The default rendering set to be applied to comparisons. If no default is specified, Workshare Compare uses the most recently used rendering set as the default.	
Display document description as well as document ID	If selected, DMS document descriptions are displayed in the Workshare Compare comparison window, where usually it would display document IDs. A DMS document ID is in the form **file://c/mydocument.doc**, whereas the description is more user friendly, for example, **mydocument.doc**. This applies to local file store as well as all other DMS integrations. Additionally, if selected, the most recently used list displays the more user friendly document description when a user is picking recent documents for a Workshare Compare comparison.	Not selected
Display document selection dialog on startup	If selected, the *Compare Documents* dialog is displayed automatically when Workshare Compare is launched.	Selected
Display Redline in page layout view	If selected, the Redline document is displayed in page layout view.	Selected
Display source document labels	If selected, the names of the original and modified documents are displayed above them in the Source Documents window.	Selected
Display source documents in page layout view	If selected, the original and modified documents are displayed in page layout view in the Source Documents window.	Not selected

Parameter	Description	Default
Display table gridlines	If selected, table gridlines are displayed in the Redline document and source documents.	Selected
Drives without Windows file sharing	If you are running OpenText NFS to map drives, the drive letters to which to save Redline documents.	
Enable fast comparison	If selected, the **Fast** comparison mode is available when comparing DOC and DOCX files. Using the **Fast** mode, Workshare Compare reads a document at a binary level and converts it to RTF format (faster than Microsoft Word in **Standard** mode) and therefore completes the comparison more quickly. If you are experiencing issues with the document comparison, your Technical Support representative may request that you disable this option. Otherwise, it is not recommended to change this setting.	Selected
Enable reduced Redline	If selected, the Redline document displays changes with limited surrounding text.	Not selected
Highlight changes in Redline on navigation	If selected, the changes made to the original document are highlighted in the Redline document when you navigate to them. For example, by selecting a change in the Change Summary window.	Selected
Launch new comparison in running instance	If selected, launching another comparison, when one is already open in Workshare Compare, will display the new comparison in a new tab in the same instance of Workshare Compare.	Not selected
Number of characters shown around a change in reduced Redline	When a reduced Redline document is produced, this setting defines the number of characters that are displayed surrounding a change. By default, the number of surrounding characters is 200; the minimum number of surrounding characters is 70.	200
Only print pages with changes	If selected, the **Only print pages with changes** checkbox in the *Print* dialog is selected by default. This option specifies that only the pages in Redline documents that include changes are printed.	Not selected

Parameter	Description	Default
Print Redline in black and white	If selected, the **Print Redline in black and white** checkbox in the *Print* dialog is selected by default. This option specifies that Redline documents are printed in monochrome (black and white).	Not selected
Prompt to save Redline after a comparison	If selected, the Redline document is automatically saved after each comparison.	Not selected
Prompt to save Redline on close	If selected, when closing Workshare Compare, a message is displayed prompting the user to save the Redline document.	Selected
Send Redline email body	The text included in the body of the email when sending a Redline by email. The {ATTACHMENTS} tag means that the names of the attachments are included below the text. Remove this tag if you do not want the attachment names to appear.	The following files have been attached to this mail by Workshare 9.5…{ATTACHMENTS}
Send Redline email subject	The text displayed in the **Subject** field when sending a Redline by email.	Workshare 9.5 Document Distribution
Synchronize documents on navigation	If selected, the views of the original, modified and Redline documents scroll to the same point when you click a paragraph in any of the documents.	Selected
Synchronize multiple Redlines on navigation	If selected, when an original document has been compared against multiple modified documents, then the views of each Redline document (in their individual tabs) scroll to the same approximate point when you click a paragraph in any of the Redline documents.	Selected
Use current instance of Word	If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from **outside** Microsoft Word use an existing winword.exe process.	Not selected
Use current instance of Word when comparing	If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from **within** Microsoft Word use an existing winword.exe process.	Not selected

Parameter	Description	Default
Use Redline name as email subject	If selected, the document name of the Redline document is used in the **Subject** field when sending a Redline by email. This setting will override any setting specified in the **Send Redline email subject** parameter.	Not selected
Zoom (%)	The magnification of the source documents and the Redline document as they appear in the Workshare Compare main window.	100

Comparison > User Interface

The **Comparison > User Interface** parameters enable you to customize the Workshare Compare user interface and set what options will be available.

The **Comparison** > **User Interface** parameters are described in the following table:
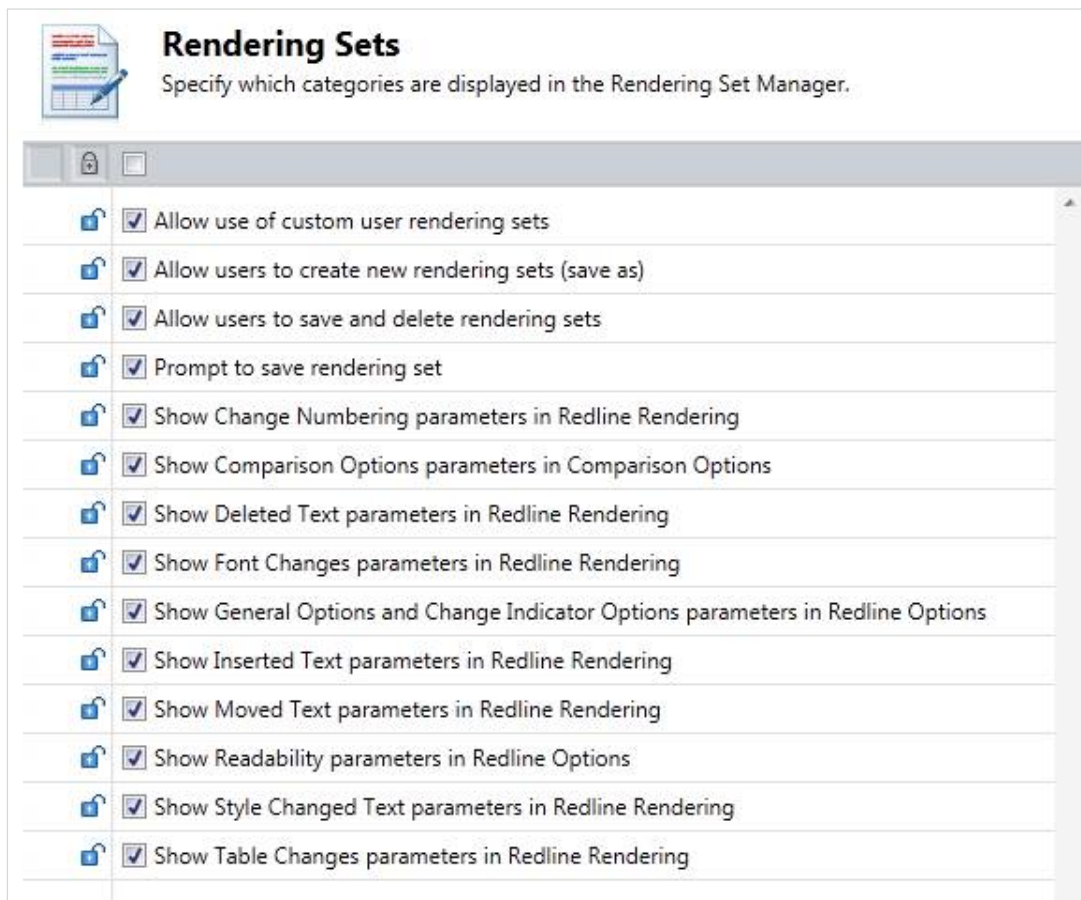
Parameter	Description	Default
Enable 'Close All'	If selected, enables the **Close All** option in Workshare Compare. The user is able to close all open Redline documents.	Selected

Parameter	Description	Default
Enable convert to Track Change functionality	If selected, the convert to track change functionality is available. This functionality enables you to save, share or open the Redline as a document with the changes shown as track changes.	Selected
Enable 'Email'	If selected, enables the **Email** option in Workshare Compare. The user is able to send the Redline and source documents by email.	Selected
Enable 'Email > Attach as PDF (only pages with changes)'	If selected, the **Email > Attach as PDF (only pages with changes)** option is available in Workshare Compare. This option enables you to email only the pages from the Redline that include changes.	Selected
Enable 'Email > Attach as Word document with Track Changes'	If selected, the **Email > Attach as Word document with Track Changes** option is available in Workshare Compare. This option enables you to convert the Redline to a document with the changes shown as track changes and email it.	Selected
Enable 'New Comparison'	If selected, enables the **New Comparison** option in Workshare Compare. The user is able to perform a new comparison.	Selected
Enable 'Open Comparison'	If selected, enables the **Open Comparison** option in Workshare Compare. The user is able to open a saved comparison (WDF).	Selected
Enable 'Open in Word'	If selected, enables the **Word > Open in Word** option in Workshare Compare. The user is able to edit the Redline document in their chosen word processor. The word processor must be configured to open rich text format files (.rtf). *Note: If the user does this, the Redline document is no longer an accurate reflection of the changes between the original and modified documents.*	Selected
Enable 'PDF'	If selected, enables the **PDF** option in Workshare Compare. The user is able to convert the Redline to PDF.	Selected

Parameter	Description	Default
Enable 'Save to My Files'	If selected, enables the **Save to My Files** option in Workshare Compare. The user is able to save a Redline document to Workshare online.	Selected
Enable 'Share'	If selected, enables the **Share** option in Workshare Compare. The user is able to share and collaborate on a Redline document in Workshare online.	Selected

Comparison > Rendering Sets

The **Comparison > Rendering Sets** parameters enable you to configure the Workshare Compare rendering set functionality as well as set what rendering set options will be available.

Rendering Sets
Specify which categories are displayed in the Rendering Set Manager.

☑ Allow use of custom user rendering sets
☑ Allow users to create new rendering sets (save as)
☑ Allow users to save and delete rendering sets
☑ Prompt to save rendering set
☑ Show Change Numbering parameters in Redline Rendering
☑ Show Comparison Options parameters in Comparison Options
☑ Show Deleted Text parameters in Redline Rendering
☑ Show Font Changes parameters in Redline Rendering
☑ Show General Options and Change Indicator Options parameters in Redline Options
☑ Show Inserted Text parameters in Redline Rendering
☑ Show Moved Text parameters in Redline Rendering
☑ Show Readability parameters in Redline Options
☑ Show Style Changed Text parameters in Redline Rendering
☑ Show Table Changes parameters in Redline Rendering

The **Comparison** > **Rendering Sets** parameters are described in the following table:

Parameter	Description	Default
Allow use of custom user rendering sets	Administrator Mode only. If selected, Workshare Compare includes the rendering sets in the personal rendering sets location (C: Users > (user name) > My Documents > Workshare > Rendering) when populating the list of possible rendering sets available.	Selected
Allow users to create new rendering sets (save as)	Administrator Mode only. If selected, the user can create new rendering sets using the **Save As** button in the Rendering Set Manager.	Selected
Allow users to save and delete rendering sets	Administrator Mode only. If selected, the user can save and delete rendering sets using the **Save** and **Delete** buttons in the Rendering Set Manager.	Selected
Prompt to save rendering set	If selected, when a user is creating their own rendering set, they are prompted to save their changes under a different name.	Selected
Show Change Numbering parameters in Redline Rendering	If selected, the Change Numbering parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to switch change numbering on and off in the Redline document and change how change numbering is displayed.	Selected
Show Comparison Options parameters in Comparison Options	If selected, the Comparison Options parameters in the **Comparison Options** category of the Rendering Set Manager are available to the user enabling the user to change the options used when comparing documents.	Selected
Show Deleted Text parameters in Redline Rendering	If selected, the Deleted Text parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to change how deleted text is displayed in the Redline document.	Selected

Parameter	Description	Default
Show Font Changes parameters in Redline Rendering	If selected, the Font Changes parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to change how font changes are displayed in the Redline document.	Selected
Show General Options and Change Indicator Options parameters in Redline Options	If selected, the General Options and Change Indicator Options parameters in the **Redline Options** category of the Rendering Set Manager are available to the user enabling the user to change how the Redline document is displayed and what information is included with the Redline document.	Selected
Show Inserted Text parameters in Redline Rendering	If selected, the Inserted Text parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to change how inserted text appears in the Redline document.	Selected
Show Moved Text parameters in Redline Rendering	If selected, the Moved Text parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to change how moved text is displayed in the Redline document.	Selected
Show Readability parameters in Redline Options	If selected, the Readability parameters in the **Redline Options** category of the Rendering Set Manager are available to the user enabling the user to change readability options in the Redline document.	Selected
Show Style Changed Text parameters in Redline Rendering	If selected, the Style Changed Text parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to determine how changes to styles are displayed in the Redline document.	Selected
Show Table Changes parameters in Redline Rendering	If selected, the Table Changes parameters in the **Redline Rendering** category of the Rendering Set Manager are available to the user enabling the user to set the options for how changes to table cells appear in the Redline document.	Selected

General > Administration

The **General > Administration** parameters enable you to specify how Workshare functions in some specific situations.
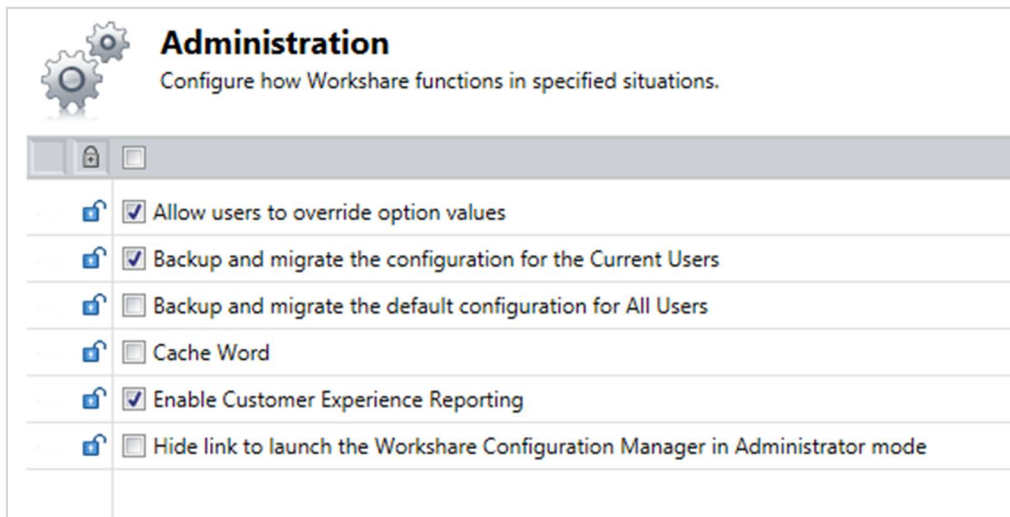
The **General** > **Administration** parameters are described in the following table:

Parameter	Description	Default
Allow users to override option values	Administrator Mode only. If selected, users can override the values for parameters in the Workshare Configuration Manager unless individual parameters have been locked.	Selected
Backup and migrate the configuration for the Current Users	If selected, when you are upgrading from an earlier version of Workshare all existing user settings and options are transferred to the Workshare 8 installation.	Selected
Backup and migrate the default configuration for All Users	Administrator Mode only. If selected, when you are upgrading from an earlier version of Workshare all existing public settings and options are transferred to the Workshare 8 installation.	Not selected

Parameter	Description	Default
Cache Word	If selected, an instance of Microsoft Word is kept in memory when Workshare is in use. This can save time when performing certain operations. If not selected, an instance of Microsoft Word is started and stopped on demand. *Note: When Microsoft Word starts up invisibly (when **Cache Word** is selected), it does not initialize its add-ins. If the user then does something to make the instance of Microsoft Word visible (for example, initiates editing a document) then the user will be working with no add-ins initialized.*	Not selected
Enable Customer Experience Reporting	Administrator Mode only. If selected, Workshare gathers anonymous usage statistics and environment information used towards product evolvement and improvement.	Selected
Hide link to launch the Workshare Configuration Manager in Administrator mode	Administrator Mode only. If selected, there will be no link to **Launch Administrator Mode** in the User mode of the Workshare Configuration Manager.	Not selected

General > User Interface

The **General > User Interface** parameters enable you to customize the Workshare user interface and set what options will be available in the Workshare ribbon/menu.

The **General** > **User Interface** parameters are described in the following table:

Parameter	Description	Default
Enable Combine PDF	If selected, the **Combine PDF** option is enabled in the Workshare tab.	Selected
Enable Compare	If selected, the **Compare** option is enabled in the Workshare tab.	Selected
Enable Content Risk	If selected, the **Content Risk** option is enabled in the Workshare tab.	Selected
Enable Convert to PDF	If selected, the **Convert to PDF** option is enabled in the Workshare tab.	Selected
Enable Selective Compare	If selected, the **Selective Compare** option is enabled in the Workshare tab.	Selected
Hide options user cannot change	If selected, the parameters that the administrator has locked so that users cannot change are hidden from the user in User Mode.	Not selected

Integrations > General

The **Integrations > General** category is where you select the default document provider with which Workshare integrates as well as set parameters general to all DMS integrations.

In the top section of the right pane, you can see the document providers with which Workshare integrates. **Local File Store** is always available and **Workshare SharePoint Connector**, **iManage**, **OpenText**, **NetDocuments** and **Worldox** are available if you have the relevant Workshare integration installed and your Workshare license includes the relevant integration.

You specify the default document source by clicking the **Set as Default** button to the right of the required document provider.

The **Integrations** > **General** parameters are described in the following table:

Parameter	Description	Default
Allow Redline save file format to be changed	If selected, the file format can be changed when saving the Redline document.	Selected
Allow Redline to be attached or related to the modified document	If selected and when using OpenText, the Redline document can be saved as an attachment to the modified document. When using iManage, the Redline document can be saved as a related document to the modified document.	Selected
Allow Redline to be attached or related to the original document	If selected and when using OpenText, the Redline document can be saved as an attachment to the original document. When using iManage, the Redline document can be saved as a related document to the original document.	Selected
Allow Redline to be saved as a new document	If selected, the Redline document can be saved as a new document.	Selected
Allow Redline to be versioned to the modified document (iManage and OpenText only)	If selected and when using OpenText or iManage, the Redline document can be versioned to the modified document.	Not selected
Allow Redline to be versioned to the original document (iManage and OpenText only)	If selected and when using OpenText or iManage, the Redline document can be versioned to the original document.	Not selected
Append document IDs to the Redline file name	If selected, the document ID or number is used as the default name for a Redline document when it is saved.	Not selected
Compare for PowerPoint – Default save format	The default format for the comparison when saving a comparison or creating a comparison report in Workshare Compare for PowerPoint (WCFP or PDF).	PowerPoint Comparison (.wcfp)

Parameter	Description	Default
Default Redline file name	The name added to the Redline document when it is saved. When using any of the following functionality, the setting specified here will be added to the default Redline name. For example: [Default Redline file name]_[name of original document]-[name of modified document]. • Word > Open in Word • Word > Open in Word with Track Changes • Save As > Comparison document • Save As > Word document with Track Changes • Email > Attach as Word document with Track Changes • Email > Attach as PDF • Email > Attach as PDF (only pages with changes) • Email > More email options	
Display document selection dialog when using Send to Application (NetDocuments only)	If selected, Workshare's *Compare Documents* dialog is displayed when using NetDocuments' Send to Application. This enables the user to further define their comparison – they can switch original and modified, add further documents to compare, change the rendering set and use the Fast comparison mode.	Selected
Enable Redline extended save file formats	If selected, the user can choose a file format that is support by Microsoft Word when saving Redline documents.	Not selected
Enable version dropdown in selection dialog (iManage only)	If selected, the user can choose versions of an iManage document from the recent files dropdown in the document selection dialog. When a document doesn't have versions, the dropdown will show only recent files.	Not selected
Include document descriptions in the Redline file name	If selected, the document description is included in the name for a Redline document when it is saved.	Selected
Include document locations in the Redline file name	If selected, the document location is included in the name for a Redline document when it is saved.	Not selected

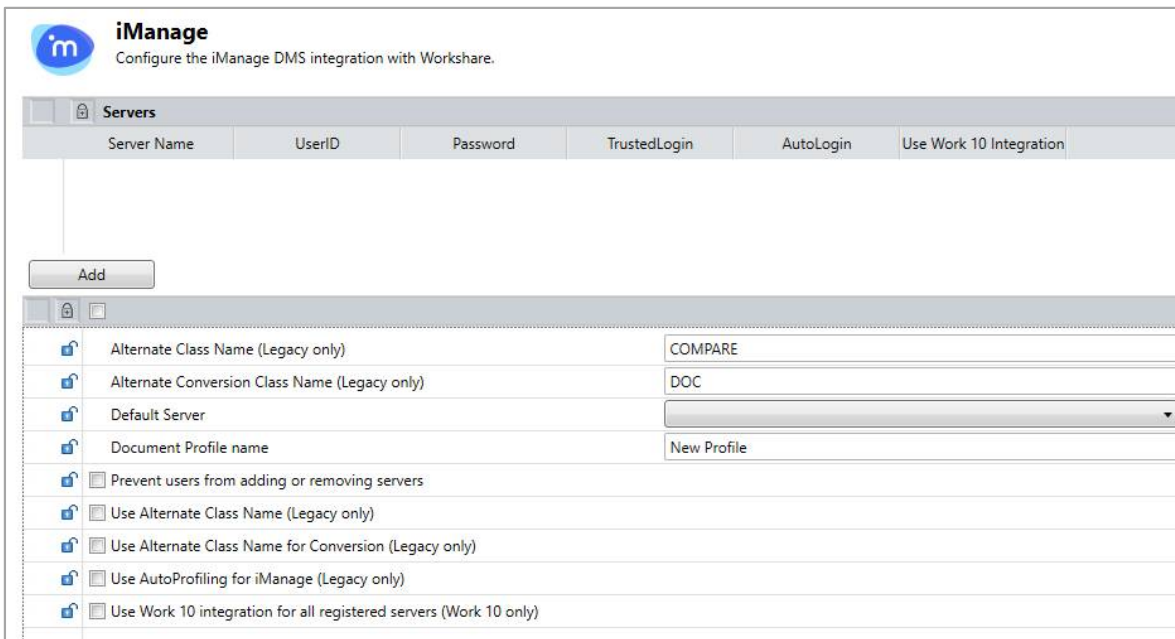| Parameter	Description	Default
Set default format when saving Redline	The default format for the Redline document when saving a Redline in Workshare Compare (WDF, RTF, DOC, DOCX, TEXT or PDF).	Portable Document Format (.pdf)

Integrations > iManage

The **Integrations > iManage** category is where you can add details of your iManage server as well as set specific parameters determining how Workshare interacts with iManage.

In User Mode, the **Integrations > iManage** category is available for iManage license holders only.

Note: *In order for this category to be available, you must ensure your Workshare license includes the iManage integration.*

In Administrator Mode, the **Integrations > iManage** category is always available.

The list of configured iManage servers is displayed in the **Servers** section of the right pane. You can add an iManage server as required.

To add an iManage server:

1. In the **Integrations > iManage** category, click **Add**. An entry is added to the list of iManage servers in the **Servers** section.

2. In the **Server Name** field, enter the name of your iManage server.

3. In the **UserID** and **Password** fields, enter the user login details that enable login to the specified server.If you connect to your iManage server using your Windows account, select the **TrustedLogin** checkbox only.

4. Select the **AutoLogin** checkbox to automatically connect to the server and authenticate the user at startup. If you do not select this checkbox, the server can be registered but will not be authenticated at startup. This may be useful in a multi-server environment when you want to save the overhead of authenticating all the servers at startup.

> *Note: If a document ID is passed to a Workshare product for a document on a server for which it has details (a registered server) but to which it is not connected, then the Workshare product will automatically connect to that referenced server.*

5. When both your server and clients are Work 10, select the **Use Work 10 Integration** checkbox.

> *Note: If you have any legacy iManage setup, for example, a Work 10 server and FileSite/DeskSite clients, do not select this option.*

6. Click **Test** to confirm connection to the specified server.

7. Add further servers as required.

To delete a server from the list, click **Remove** to the right of the server details.

The **Integrations > iManage** parameters are described in the following table:

Parameter	Description	Default
Alternate Class Name (Legacy only)	For legacy (pre-Work 10) iManage environments. If the **Use Alternate Class Name** parameter is selected, the class name to use. This class MUST exist on your iManage server.	COMPARE
Alternate Conversion Class Name (Legacy only)	For legacy (pre-Work 10) iManage environments. If the **Use Alternate Class Name for Conversions** parameter is selected, the class name to use when converting to PDF. This class MUST exist on your iManage server.	DOC

Parameter	Description	Default
Default Server	The default iManage server to use in multi-server environments. Select one of your configured servers to be the default server.	
Document Profile name	When automatically profiling documents, the document profile name to use.	New Profile
Prevent users from adding or removing servers	If selected, users cannot add or delete server details in User mode.	Not selected
Use Alternate Class Name (Legacy only)	For legacy (pre-Work 10) iManage environments. If selected, the class name (specified in the **Alternate Class Name** parameter) is used in the profiling when saving Redline documents (comparisons).	Not selected
Use Alternate Class Name for Conversion (Legacy only)	For legacy (pre-Work 10) iManage environments. If selected, the class name (specified in the **Alternate Conversion Class Name** parameter) is used in the profiling when converting documents to PDF.	Not selected
Use AutoProfiling for iManage (Legacy only)	For legacy (pre-Work 10) iManage environments. If selected, automatic profiling is performed when adding documents to the iManage database.	Not selected
Use Work 10 integration for all registered servers (Work 10 only)	In Work 10 environments, if selected, all servers will use the Work 10 integration. *Tip! Workshare automatically detects iManage servers and will auto-populate the server list. However Workshare assumes legacy servers so does not select the* ***Use Work 10 Integration*** *checkbox. Selecting this parameter is a quick way of ensuring all your servers use the Work 10 integration.*	Not selected

Integrations > Microsoft SharePoint

The **Integrations > Microsoft SharePoint** category is where you can add SharePoint sites configured on your SharePoint server details as well as set specific parameters determining how Workshare interacts with Microsoft SharePoint.

In User Mode, the **Integrations > Microsoft SharePoint** category is available for SharePoint license holders only.

Note: In order for this category to be available, you must ensure your Workshare license includes the SharePoint integration.

In Administrator Mode, the **Integrations > Microsoft SharePoint** category is always available.

The list of specified SharePoint sites is displayed in the **Servers** section of the right pane. You can add new SharePoint sites configured on your SharePoint server as required.

To add a SharePoint site:

1. In the **Integrations > Microsoft SharePoint** category, click **Add**. An entry is added to the list of SharePoint sites in the **Servers** section.

2. In the text box, enter the complete URL for the SharePoint site location.

3. From the **Metadata Cleaning Policy** dropdown list, select how the site is to be considered for policy application purposes. If you select **Internal Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed internally. If you select **External Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed externally.

4. Click **Test** to confirm connection to the specified site.

To delete a site from the list, click **Remove** to the right of the site details.

The **Integrations > Microsoft SharePoint** parameters are described in the following table:

Parameter	Description	Default
Default View	The default view selected in the list of Use Views.	
Profile New Documents	If selected, when a document is saved into SharePoint, a form is displayed to collect document metadata. *Note: To enable this profiling feature, the SharePoint site must have custom content types set up.*	Not selected
Use Views	If selected, a dropdown list of the views available in a SharePoint document library is displayed in the top right of the SharePoint browser window. This acts as a filter for the files displayed by the browser.	Not selected

Registry Configuration

This section describes configuration of Workshare that is done by making changes in the Registry.

> *Important:* If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Only system administrators should attempt to make changes in the Registry.

Convert Hyperlinks

When converting documents to PDF files, the Workshare PDF driver does not by default convert hyperlinks. Some PDF reader will convert hyperlinks within a PDF. If you want the Workshare PDF driver to convert hyperlinks when creating the PDF, you need to create the Registry value **PDFFileNameOptionsEx** in the Registry key SOFTWARE\Workshare\Options\10.00\Internal\PDF with a string value of **0x00140091**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user. Note that enabling this feature will impact performance and will slow down the PDF conversion process. If you want to turn the Convert Hyperlinks feature off, you should either remove this Registry value or change the Registry value to **0x00040091**.

Small Text Removal

When Workshare is configured to clean/delete small text (smaller than 5 points), it will check content for half sizes as well as full sizes (4.5, 4, 3.5, 3, 2.5, 2, 1.5, 1, 0.5) and this may slow down the cleaning process. If you want Workshare to just clean full point sizes (4, 3, 2, 1), you need to create the Registry value **HalfPointSmallTextSupport** in the Registry key SOFTWARE\Workshare\Options\10.00\Protect\ProtectAdmin with a string value of **true**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user.