

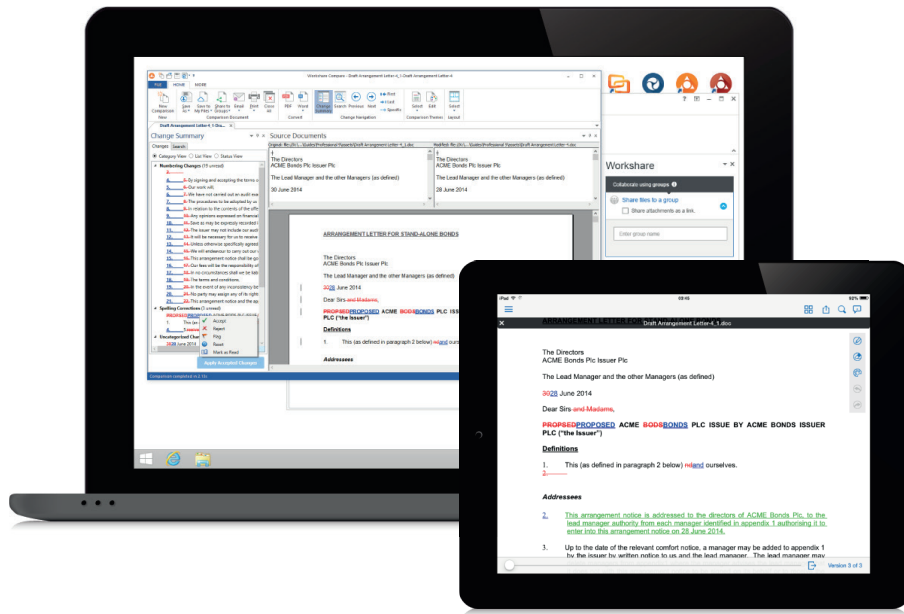


Workshare Professional 9

Getting started guide

Hello and welcome to Professional 9

We're experts in document collaboration, and we have a simple concept with a simple goal – to help you work on documents with other people by giving you the right tools to do it. Workshare Professional combines three elements, each one designed to optimize a stage of the document review cycle.



WORKSHARE COMPARE

When you're working on a document together, it's essential to understand how it's evolving. With Compare, you can compare even the most difficult and complex documents and presentations accurately.



WORKSHARE PROTECT

Some information is meant to be private. With Protect, you can protect yourself from accidentally sharing sensitive data when you're sending emails, and replace your attachments with a link to a workspace where others can review them.



WORKSHARE CONNECT

Extend your comparison and protection functionality. Take your documents with you wherever you go by adding them to Connect. When you're ready to review them with others, create a flexible workspace – a group.

Let us show you around...



Compare Word, PDF or PowerPoint files

Compare enables you to compare two or more documents and instantly see any differences between them. There are two separate applications, depending on what type of documents you're comparing:

- **Workshare Compare** is for seeing changes between Word documents and PDFs.
- **Workshare Compare for PowerPoint** is for seeing changes between PowerPoint presentations.

There are several ways to access Compare and Compare for PowerPoint. Choose whichever option is most convenient for you.

On your desktop

Double-click one of the icons on your desktop.

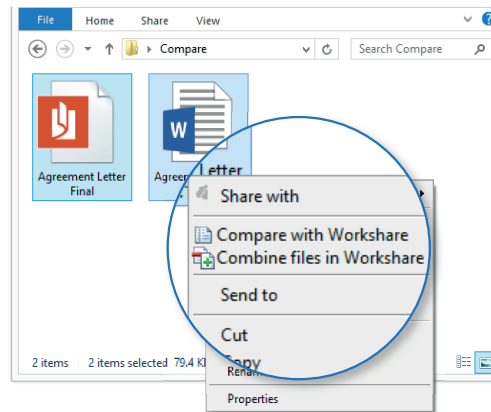


To compare Word or PDF files, select Workshare Compare. To compare PowerPoint files, select Workshare Compare for PowerPoint.

Once Compare or Compare for PowerPoint is open, you can select files to compare.

In Windows Explorer or your DMS

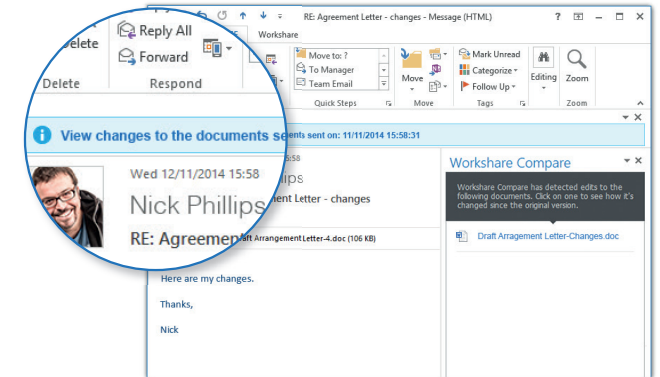
Select one or two documents and right-click.



Depending on which file types you've chosen, Compare or Compare for PowerPoint will be launched.

In your email (Word documents only)

Click the change notification.

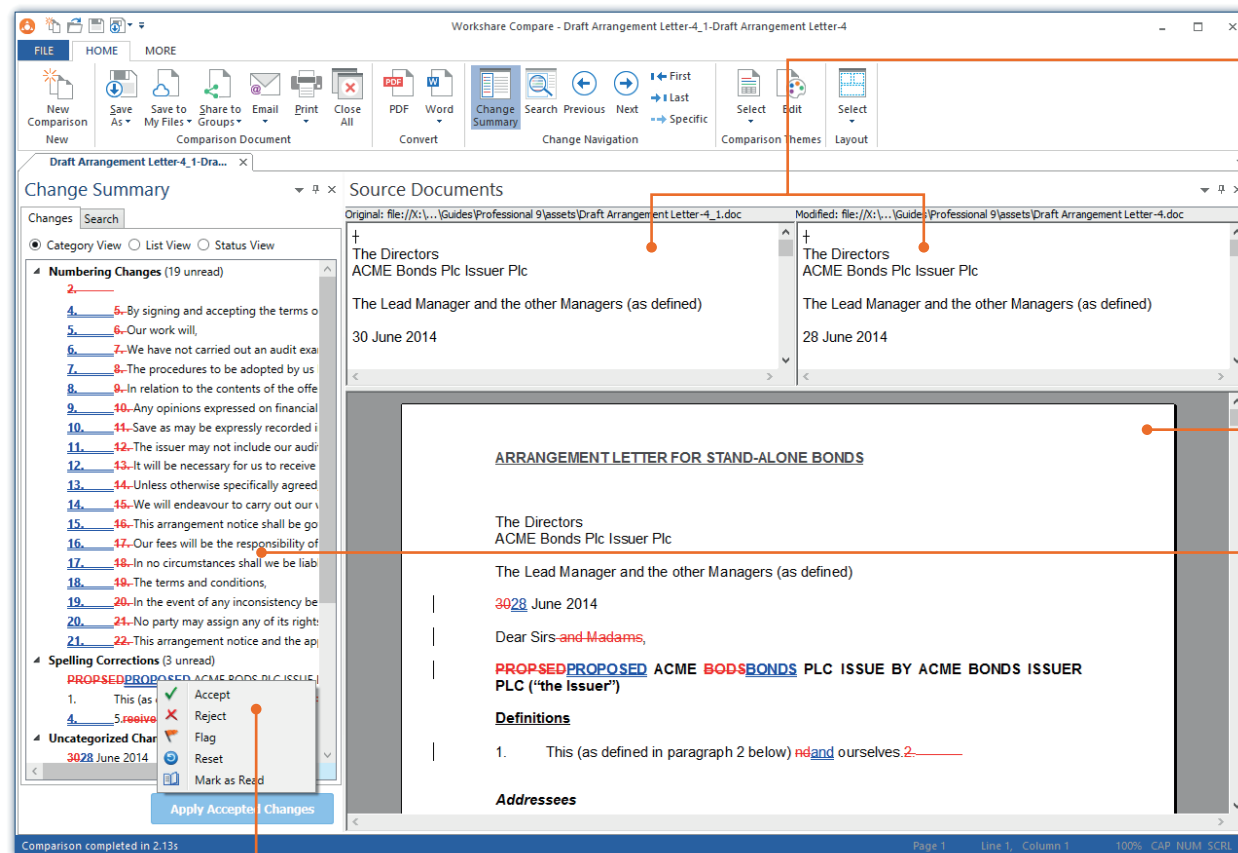


Compare automatically detects if a received attachment is a changed version of a file you sent previously. Clicking the notification enables you to launch a comparison of the two documents.



Understand, implement and communicate changes between Word and PDF files

Once you've compared Word or PDF documents, you'll instantly see any differences between them in Compare. You can now manage your changes and save the comparison document (Redline document) or add your changes right from Compare and save the new version as a Word document.



See the documents you're comparing.

See the comparison document (Redline document) with the changes displayed.

See a list of the changes. Click a change to see where it's located in the documents.

Accept, reject or flag changes for review later.

When you're ready, click **Apply Accepted Changes**. A new Word document will open with the changes accepted or rejected, which you can save locally or to your DMS. If you have Connect, you can also **save** it to Connect so you can take the document with you wherever you go or **share** the document with others in a flexible workspace – a group.



Understand and communicate changes between PowerPoint presentations

Once you've compared PowerPoint presentations, you'll instantly see any differences between them in Compare for PowerPoint. You can save the comparison as a PDF or a Compare for PowerPoint file (.WPF), or you can print the comparison.

Save the comparison as a .WPF file, which can be opened in Compare for PowerPoint.

Create a comparison report, which presents the changes in a PDF that you can save or send.

Print the comparison.

See the changes in the current slide.

See a list of the changes. Click a change to see where it's located in the presentations.

See all the slides in the presentations you're comparing.

● - This icon indicates the slide is the same.
● - This icon indicates the slide has been changed.

To view only changed slides, select **Hide unchanged slides** in the **View** tab.

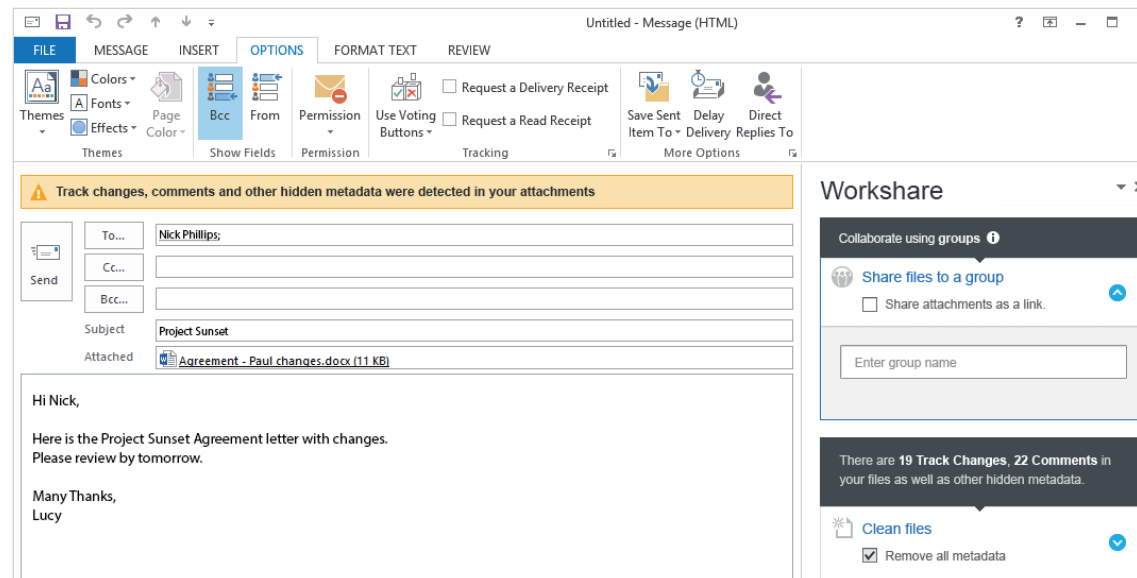
Slide Number	Change Numbers	Type	Status	Details
9/	1	Slide move source	#a	
/10	2	Slide move destination	#a	
/12	3	Inserted slide	#a	
12/13	4-5	Replaced text	#a	QualityQuality Management and Performance Measures
12/13	6-7	Replaced text	#a	\$Define quality managementmanagement plans
12/13	8	Inserted text	#a	\$How will you monitor and control costs?
12/13	9	Inserted text	#a	\$How will you monitor and control schedule?



Identify risk in attachments

Protect enables you to protect yourself from accidentally sharing sensitive data you may want to keep private. You can find and remove hidden metadata. For example, this could be track changes, the author's name, server names, keywords, routing slips, authoring trails, hidden slides, comments, speaker notes or hidden sheets. You can also convert your documents to PDF or PDF/A. When you're ready to review your documents with others, you can create a flexible workspace – a group – to share them.

The primary way to access Protect is in email. When you add an attachment to a new email, Protect automatically scans the document for sensitive data, and if it's found, a notification appears at the top of your email. To see which sensitive data was found and to protect your documents, click the notification, and the Interactive Protect panel will open.



You can also protect documents if you're not emailing them. When you right-click a document on your desktop, you'll be given the options to remove metadata or convert it to a PDF. For more information about these options, see the Professional 9 User Guide.

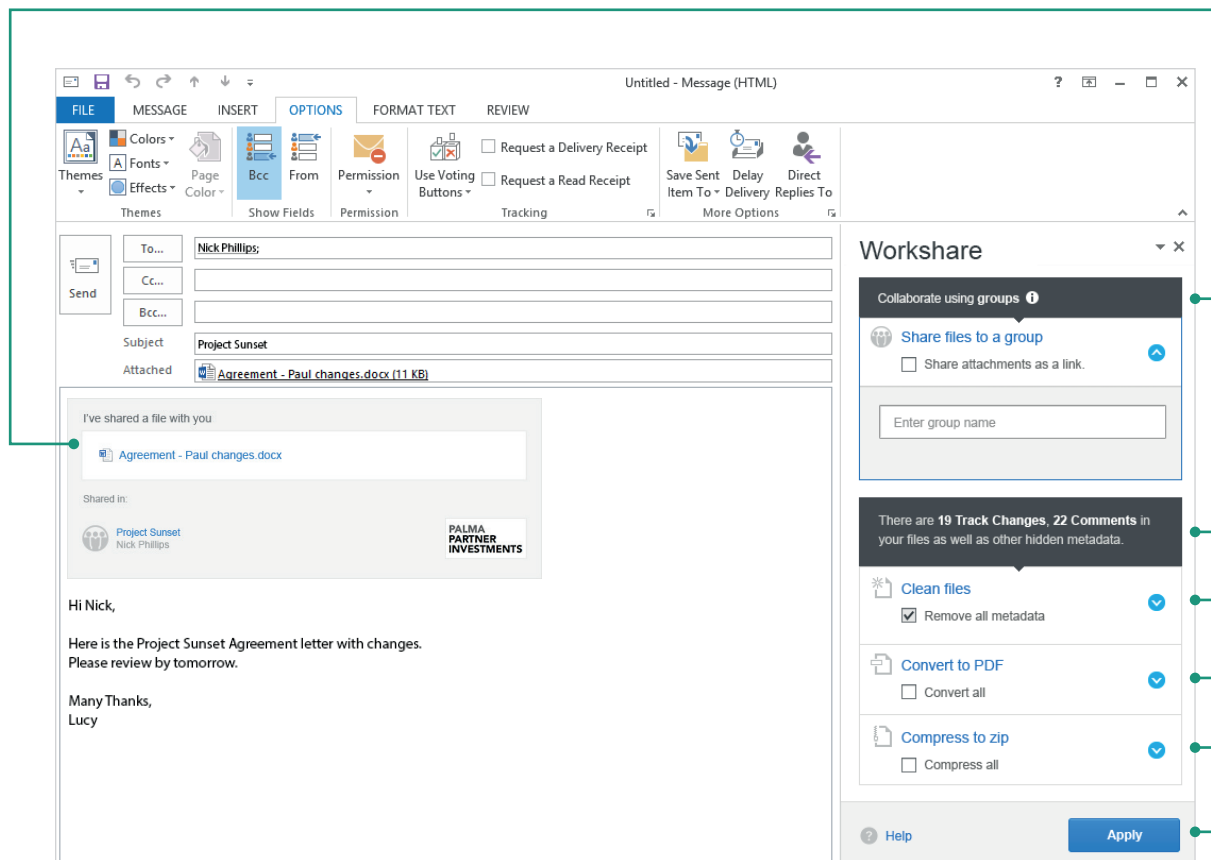


Depending on how your administrator's configured your settings, you may be notified of sensitive data when you click the **Send** button. If this happens, you'll see either the Protect Profiles dialog or Email Security dialog instead of the Interactive Protect panel. For more information, see the Professional 9 User Guide by searching "Professional 9 user guide" in the knowledge base: workshare.force.com/knowledgebase



Protect your attachments before you email them

From the Interactive Protect panel, you can see what risky information is in your documents and remove it. If you're using Connect, you can also share your documents in a flexible workspace – a group.



Share your documents in a workspace where you can review them with others.

The protection options you've selected (such as removing metadata or converting to PDF) will be applied and the documents will be added to a group in Connect. A link to the group will be added to your email.

The recipients of your email can access the group by clicking the link when they receive the email.

See what sensitive data is in your attachments.

Control and **secure** your documents. You can expand these options to specify which metadata is removed and which documents are protected.

Apply your changes when you're ready. While your documents are being processed, you can write your email.



Save, share and get live updates

Connect enables you to connect to the people you work with, the documents you care about and the devices you use. Connect integrates with Compare, Protect, Microsoft Office and your desktop in different ways. Choose the one that's right for the document's stage in the review cycle.

Save your documents or redlines

You can work on your private documents wherever you want by simply adding them to Connect. They'll be accessible online, on your desktop and on your mobile.

Choose the way that's easiest for you:

- Drag and drop the document into **My Files**, found in your **Workshare sync** folder.
- If you have a document open in Compare, Word, PowerPoint or Excel, you can use the **Save to My Files** button.

Share your documents or redlines

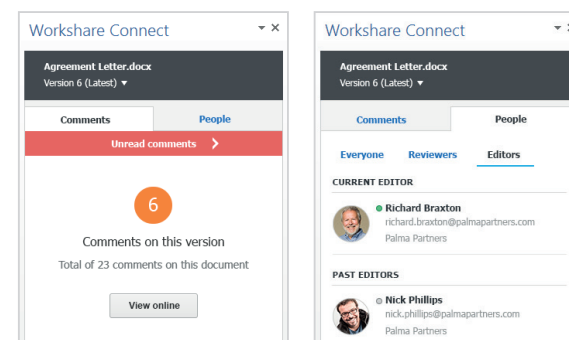
When you're ready to work with others to review the documents, you can create a flexible workspace – a group.

Choose the way that's easiest for you:

- Open **Group Files**, found in your **Workshare Sync** folder, and drag and drop the file into an existing group.
- If you have a document open in Compare, Word, PowerPoint or Excel, you can use the **Share** button.
- If you have the Interactive Protect panel open in a new email, you can share your attachment by selecting **Share files to a group**.

Get live updates on your collaboration

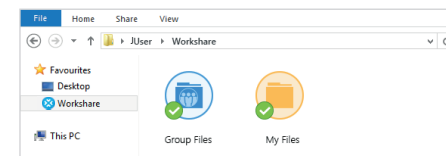
If you've shared a document to a group, you'll see the Workshare Connect panel when you open the document in Word, PowerPoint or Excel.



The panel gives you real-time updates on what's happening to your document in Connect, including who is sharing your document, how many comments have been made, and whether any new versions have been added.

Workshare sync folder

When you install the Connect component of Workshare Professional, the **Workshare sync** folder automatically appears under **Favourites** in Windows Explorer. You can use it to synchronize content between your PC and Connect. For more information, see the **Workshare Connect: Desktop App** guide by searching "desktop app guide" on the knowledge base: workshare.force.com/knowledgebase





Access your private documents and collaborate in groups

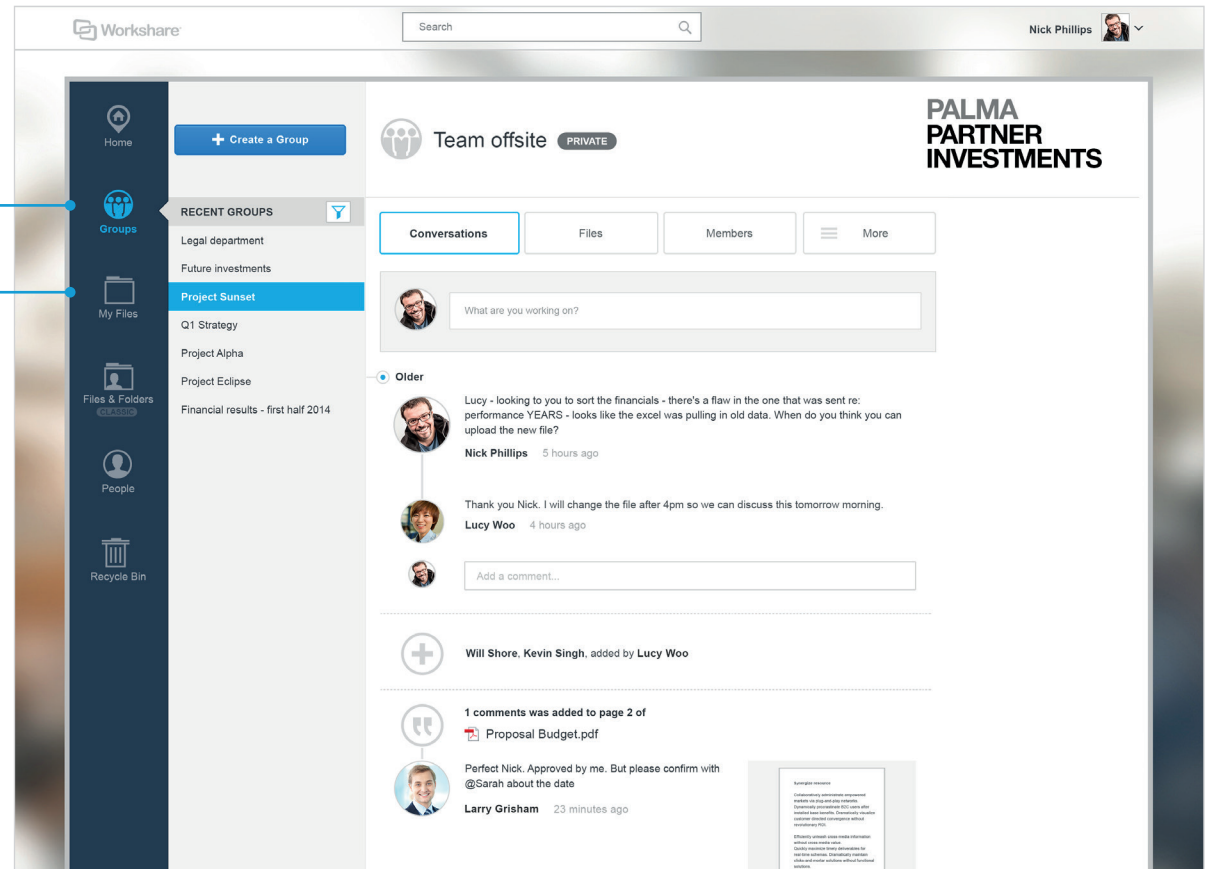
You can access your private documents and groups at any time. Just go to Connect for web at my.workshare.com.

When you **share** documents on Connect, they go into a **group**. Groups are workspaces where you can share files with people inside and outside your company. You control what people can do with your documents and how they can be accessed.

- Anyone can post to **Conversations** to share an idea with the group. It's a great place to discuss how the work is going and understand what will happen next to the documents.
- **Files** is where you can see your documents, mark changes to be made and upload new versions when they're ready.
- The people you see in **Members** have access to the files and conversations in the group. These people will take the documents through to the next stage of their evolution.

When you **save** documents to Connect, they appear in **My Files**. This area is where you can keep files you need to access but don't want to share. They sync across your devices so you can keep working from anywhere.

Edit them, move them or delete them – it won't affect anyone else. When you're ready to work with others, you can share a copy to a group.



- i** You can also use the **Workshare sync** folder for accessing files. Any changes you make in your **Workshare sync** folder will be reflected in the web app and vice versa. For more information, see the **Workshare Connect: Desktop App** guide by searching “desktop app guide” on the knowledge base: workshare.force.com/knowledgebase. Additionally, you can get the Connect mobile app for free from iTunes. With the app, you can access and review content from your tablet or mobile.

? Find out more

➤ Other guides

Workshare Professional: User Guide
Workshare Connect: Desktop App

workshare.force.com/knowledgebase

➤ Knowledge base

For step-by-step instructions
to use these features, see

workshare.force.com/knowledgebase

➤ Technical support

If you've got a support
license, email us at

support@workshare.com

Other Workshare products



PROTECT

Metadata removal policy.
www.workshare.com/products/protect



CONNECT

Secure online file sharing and collaboration.
www.workshare.com/products/connect



COMPARE

Fast, accurate document comparison.
www.workshare.com/products/compare



PROFESSIONAL

Compare, Protect and Connect.
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