Workshare Professional 10.1

Installation Guide

Workshare Professional 10.1 R1 | May 2019 | 10.1.4567.0

Table of Contents

Chapter 1: Installation Overview 6
Introducing this Guide 7
System Requirements 7
Certified Environments for Workshare 10 (32-bit version) 7
Certified Environments for Workshare 10 (64-bit version) 9
Installation Guidelines 11
Workshare Installation Files 13
Executables 13
Update or full release? 13
Prerequisite components 13
Windows installer packages 14
Workshare PDF Publisher 15
Important Information 15
Workshare Configuration Assistant 15
Re-running the WCA 16
Workshare Microsoft Office integration 17
Workshare OCR functionality 17
Chapter 2: Installation on Single Workstation 18
Installing Workshare 19
Uninstalling Workshare 22
Upgrading Workshare 22
Before you upgrade… 23
Chapter 3: Licensing 24
Licensing Workshare 25
How Workshare checks for licenses 26
Standard Install 27
One-time log in 27
Prevent sign in dialog displaying 29

Deployment with User Authenticated License 29
Create accounts for users 29
Create accounts without the Admin Console 32
Deployment with Enterprise License 33
Registry location 33
End user interaction 33
Capturing of email 34
Renewing a License 34
Trial users 35
Chapter 4: Configuration 36
Introducing the Workshare Configuration Manager 37
Administrator Mode and User Mode 37
Default policy 38
Accessing the Workshare Configuration Manager 39
Searching parameters 41
Setting Parameters 42
Recipient checking 42
Deploying Configuration Settings 43
Saving configuration files 44
Loading configuration files 47
Upgrading 47
Registry Configuration 48
Small text removal 48
Chapter 5: Integration 49
Introduction 50
Document Management Systems 50
DMS integration for Workshare 10 (32-bit version) 50
DMS integration for Workshare 10 (64-bit version) 51
Email systems 51
Document Management Systems Integration 52

iManage integration – configuring server integration 52
Adding file types to the iManage server 52
Adding the Workshare comparison applications to the iManage server 53
Adding Workshare as a class to iManage server 55
Work 10 configuration 56
iManage integration – configuring client integration 57
Launching applications within iManage 57
Creating Workshare comparison icons on the iManage desktop 59
iManage integration - configuring Workshare 59
OpenText integration 60
Adding application and file types to the server 61
Making Workshare compatible with OpenText eDOCS DM 63
Making the Workshare comparison icons appear on the desktop and within a user profile 64
Worldox integration – configuring compare files 64
NetDocuments integration 66
SharePoint integration - server installation 68
SharePoint integration - client configuration 72
SharePoint site configuration 72
Email Systems Integration 73
Setting up Microsoft Outlook 73
Setting Up IBM Notes 74
Resolving Email Addresses as Internal - Creating the Internal Domain List 74
Offline Mode 74
Issues with Custom Forms (Recipient Fields) 76
Chapter 6: Network Deployment 77
Overview 78
Installation file summary 78
Deploying via the Command Line 80
Configuring modules during installation 80

Registry....80
DisableFeatures.ini....82
Installation procedure with the install wizard....82
Deploying Workshare with the executable....82
Installation procedure using the MSI files directly....83
Example installations....83
Compulsory properties– Professional/Compare/Protect....92
Optional properties – Professional/Compare/Protect....92
Optional properties – desktop app....94
Citrix Installation Guidelines....95
Enable specific users....96
Active Directory Deployment Guidelines....96
Assigned/published to user methods....96
Deploying Workshare using Active Directory....97
Appendix A. Additional Msiexec.exe Parameters and Switches....103
Msiexec.exe Parameters and Switches....104

Chapter 1: Installation Overview

This chapter provides an overview of the installation of Workshare Professional, Workshare Compare and Workshare Protect as well as a list of system requirements. It includes the following sections:

- **Introducing this Guide**, page 7, explains what this installation guide covers.
- **System Requirements**, page 7, describes the system attributes required in order to install and run Workshare Professional/Compare/Protect.
- **Installation Guidelines**, page 7, describes the recommended installation and deployment procedure for Workshare Professional/Compare/Protect.
- **Workshare Installation Files**, page 13, describes the installation files and prerequisites for Workshare Professional/Compare/Protect.
- **Important Information**, page 15, provides important information that should be read before installing, configuring and deploying Workshare Professional/ Compare/Protect.

Introducing this Guide

This Installation Guide describes how to install, license and integrate Workshare Professional 10 into your environment. It covers the installation of the following:

- **File Comparison**: Workshare Compare shows precise changes between versions of Word, PDF, PowerPoint and Excel files including DMS files and versions. The DeltaView redline sets the standard for an easy-to-read, accurate view of changes between document versions. Compare's advanced comparison engine performs comparisons accurately and seamlessly enabling users to quickly compare even the most difficult and complex documents, presentations and spreadsheets.
- **File & Metadata Security**: Workshare Protect identifies and cleans metadata from documents, removing the risk of unintentional data leakage. When sending emails, users can remove hidden sensitive data, convert the documents to PDF or PDF/A and even replace attachments with a link to Workshare's secure online platform where others can review them. Additionally, Workshare provides the ability to set policies to automatically clean attachments based on specific criteria.
- **File Share & Sync**: Workshare Connect extends comparison and protection functionality with online services. Comparisons as well as Office documents can be securely saved and shared to Workshare's secure online sharing platform, and attachments can be replaced with a secure link to the document. Workshare also includes a desktop sync app – an application that syncs content between your desktop and Workshare's secure online platform. At any time, you can access and review your Workshare content as well as add files.

System Requirements

The recommended system requirements for Workshare Professional 10.1 Revision 1 are:

- Intel Core i3 @ 2.5GHz
- AMD Athlon 64 X4
- 4GB RAM

Workshare Professional 10.1 has a 32-bit version for 32-bit Microsoft Office environments and a 64-bit version for 64-bit Office environments.

Certified Environments for Workshare Professional 10.1 (32-bit version)

Workshare Professional 10.1 Revision 1 (32-bit version) has been tested and certified in a number of environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support (support@workshare.com) for any help.

For details of which environments previous versions of Workshare Professional/Compare/ Protect were certified against, refer to previous versions of release notes on the knowledge base.

***Note**: Unless otherwise stated, all environments are the English version with the en-us language set.*

Operating System:

- Microsoft Windows 10 (32 bit and 64 bit)
- Microsoft Windows 8.1 (32 bit and 64 bit) + Japanese
- Microsoft Windows 7 SP1 (32 bit and 64 bit) + Chinese Simplified & French

Citrix:

- With Microsoft Windows Server 2012 R2 or 2016 (64 bit)
  - Citrix XenApp 7.5
  - Citrix XenDesktop 7.5

***Note:** Check with your Citrix vendor about which Windows operating system supports your version of Citrix.*

Microsoft Office System:

- Microsoft Office 365 (desktop)
- Microsoft Office 2019 (32 bit) – including click-to-run
- Microsoft Office 2016 (32 bit) – including click-to-run
- Microsoft Office 2013 SP1 (32 bit) + Japanese – including click-to-run

Email System:

- Microsoft Outlook 365 (desktop)
- Microsoft Outlook 2019 (32 bit)
- Microsoft Outlook 2016 (32 bit)
- Microsoft Outlook 2013 SP1 (32 bit) + Japanese
- IBM Notes 9.0.1 FP7, FP8 and FP9

***Note**: Interactive Protect and the replace email attachment with link features of Workshare are not supported in a Notes environment.*

Browsers:

- Microsoft Edge, latest version
- Microsoft Internet Explorer 11
- Google Chrome, latest version

- Mozilla Firefox, latest version

Microsoft SharePoint:

- Microsoft SharePoint 2013 SP1

DMS Integration:

> ***Note:*** *Check with your DMS vendor about which Windows operating system supports your DMS.*

- **NetDocuments**

  ndOffice must be installed to use the Workshare NetDocuments integration.

  > ***Note****: If you want Workshare to be available when using the NetDocuments* ***Send to application*** *functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).*

- **iManage clients:**
  - FileSite/DeskSite 9.0 Update 6 and above
  - Work 10 Desktop for Windows 10.0 and above
  - Work 10 web client (You will need to install Workshare iManage Integration Server in order to launch comparisons from the iManage browser interface.)

  > ***Note****: If you use a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91 (which can be requested from iManage with reference CSAR-2673).*

- **OpenText:**
  - eDOCS DM 16.3
  - eDOCS DM 10
  - eDOCS DM 5.3.1 COM only (Patch 6)
- **Worldox:**
  - GX4

Workshare will endeavor to support future service packs of certified environments.

Certified Environments for Workshare Professional 10.1 (64-bit version)

Workshare Professional 10.1 Revision 1 (64-bit version) has been tested and certified in a number of environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support (support@workshare.com) for any help.

For details of which environments previous versions of Workshare Professional/ Compare/Protect were certified against, refer to previous versions of release notes on the knowledge base.

***Note**: Unless otherwise stated, all environments are the English version with the en-us language set.*

Operating System:

- Microsoft Windows 10 (64 bit)

Citrix:

- With Microsoft Windows Server 2012 R2 (64 bit)
  - Citrix XenApp 7.5
  - Citrix XenDesktop 7.5

***Note:** Check with your Citrix vendor about which Windows operating system supports your version of Citrix.*

Microsoft Office System:

- Microsoft Office 365 (desktop) (64 bit)
- Microsoft Office 2019 (64 bit)
- Microsoft Office 2016 (64 bit)
- Microsoft Office 2013 SP1 (64 bit)

Email System:

- Microsoft Outlook 365 (desktop) (64 bit)
- Microsoft Outlook 2019 (64 bit)
- Microsoft Outlook 2016 (64 bit)
- Microsoft Outlook 2013 SP1 (64 bit)

Browsers:

- Microsoft Edge, latest version
- Microsoft Internet Explorer 11
- Google Chrome, latest version
- Mozilla Firefox, latest version

DMS Integration:

> ***Note:*** *Check with your DMS vendor about which Windows operating system supports your DMS.*

- **NetDocuments**

  ndOffice must be installed to use the Workshare NetDocuments integration.

  > ***Note****: If you want Workshare to be available when using the NetDocuments* ***Send to application*** *functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).*

- **iManage clients:**
  - FileSite/DeskSite 9.3 (64 bit) and above
  - Work 10 Desktop for Windows 10.0 (64 bit) and above
  - Work 10 web client (You will need to install Workshare iManage Integration Server in order to launch comparisons from the iManage browser interface.)

  > ***Note****: If you use a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91 (which can be requested from iManage with reference CSAR-2673).*

- **OpenText:**
  - eDOCS DM 16.3
  - eDOCS DM 10

Workshare will endeavor to support future service packs of certified environments.

Installation Guidelines

This guide will take you through a typical Workshare Professional (Compare/Protect) installation. The general steps involved are as follows:

1. For DMS users, configure your DMS server and client (described in *Chapter 5: Integration*).
2. Install Workshare Professional (Compare/Protect) on a single workstation (described in *Chapter 2: Installation*).
3. Use the Workshare Configuration Manager (Administrator Mode) to configure Workshare Professional (Compare/Protect) as you want it to work in your organization (described in *Chapter 4: Configuration*).
4. Save the configuration to a deployment script (reg or adm file) (described in *Saving Configuration Files* in *Chapter 4: Configuration*).

5. Deploy the configuration across your network using a deployment script so that Workshare Professional (Compare/Protect) will be configured uniformly across your organization.
6. Deploy Workshare Professional (Compare/Protect) across your network (described in *Chapter 6: Network Deployment*).

It is recommended that you follow the guidelines listed below when installing Workshare Professional (Compare/Protect) to ensure a smooth and trouble-free installation:

- Your system must meet the recommended requirements for Workshare Professional (Compare/Protect) shown on page 7.
- All important data should be backed up prior to installation.
- Elevated/administrator privileges are required to install Workshare Professional (Compare/Protect).
- Workshare Professional (Compare/Protect) MSI files should not be directly edited. Changes can be applied via a transform file (.mst) or other method of applying properties such as command line parameters.
- Transform files may be created via any third party software that supports Windows Installer technology.
- Workshare Professional (Compare/Protect) MSI files should not be repackaged. Certain custom actions that are contained in the original MSI file may be missed and may also prevent future upgrades.
- Workshare Professional (Compare/Protect) MSI files should not be patched with in-house authored MSP files as this may cause future upgrade issues and system instability.
- Additional customer specific files and Registry keys may be deployed alongside Workshare software as long as they do not interact or replace any files or Registry keys belonging to the product.
- No additional third party software should be bundled into any Workshare Professional (Compare/Protect) MSI.

If you have any queries about the installation of Workshare Professional (Compare/Protect) that are not dealt with in this guide, please contact Workshare Customer Support.

Workshare Installation Files

This section describes the Workshare Professional (Compare/Protect) executables, Windows Installer packages and shared components.

Executables

A single, downloadable self-extracting executable will install Workshare Professional (Compare/Protect) and (where necessary) the DMS integration. Workshare can be installed to work with your local file system or with your DMS.

The installation executables are as follows:

Executable	Installs….
Workshare.Professional.Bundle.exe/ Workshare.Professional.Bundle.X64.exe	File Comparison, File & Metadata Security, File Share & Sync
Workshare.Compare.Bundle.exe/ Workshare.Compare.Bundle.X64.exe	File Comparison, File Share & Sync
Workshare.Protect.Bundle.exe/ Workshare.Protect.Bundle.X64.exe	File & Metadata Security, File Share & Sync

On a single workstation, the easiest way to install Workshare Professional (Compare/Protect) is to simply run the install executable file and answer any questions asked. Where a manual installation per computer is not feasible, you can deploy Workshare Professional (Compare/Protect) to multiple workstations using methods described in *Chapter 6: Network Deployment*.

Update or full release?

The Workshare installation files will vary according to the type of release:

- Fast track fixes: Individual fast track fixes will be sent to individual customers via an MSP, EXE or ZIP file.
- Full product releases: Full product releases will be via MSI and EXE files only.

Prerequisite components

The prerequisites for Workshare Professional (Compare/Protect) 10 are as follows:

- Microsoft .NET Framework 4.6.2
- Microsoft Visual C++ 2017 Redistributable Package (x86)
- Microsoft Visual C++ 2017 Redistributable Package (x64)
- Microsoft Visual Studio 2010 Tools for Office Runtime Setup

***Note**: Microsoft Visual C++ 2015 Redistributable Package (x86/x64) is also acceptable since 2017 and 2015 are binary compatible runtimes: https://docs.microsoft.com/en-us/cpp/porting/binary-compat-2015-2017?view=vs-2017*

Installation using the executable will install the prerequisites if they are not already installed.

Windows installer packages

If you need to extract the MSI and prerequisites from the executables, you can do so using the `/layout` command. The *Downloading Files and Prereqs* dialog is displayed while the prerequisites and MSIs are downloaded to the same location as the executable. The prerequisite executables are put in a folder called **redist**.

The following files are extracted from the executables:

Executable	Contents Extracted
Workshare.Professional.Bundle.exe	Workshare.Professional.msi WorkshareCompareForPowerPoint.msi Workshare.ExcelCompare.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Compare.Bundle.exe	WorkshareCompare.msi WorkshareCompareForPowerPoint.msi Workshare.ExcelCompare.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Protect.Bundle.exe	WorkshareProtect.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)

Executable	Contents Extracted
Workshare.Professional.Bundle.X64.exe	Workshare.Professional.X64.msi WorkshareCompareForPowerPoint.X64.msi Workshare.ExcelCompare.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Compare.Bundle.X64.exe	WorkshareCompare.X64.msi WorkshareCompareForPowerPoint.X64.msi Workshare.ExcelCompare.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Protect.Bundle.X64.exe	WorkshareProtect.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)

If you install using an extracted MSI, you must first install all the prerequisite components described above.

Workshare PDF Publisher

When Workshare Professional (Compare/Protect) is installed it creates a printer called **Workshare PDF Publisher** in the user's **Printers** folder. This is the printer that Workshare uses to convert documents to PDF.

Important Information

Workshare Configuration Assistant

The Workshare Configuration Assistant (WCA) is a program that completes the installation process. The WCA is not optional as it performs actions that are required to correctly install the product. The install process automatically runs the WCA silently.

Re-running the WCA

Following installation, the WCA can be run as a separate executable for any of the following reasons:

- To update an installation, such as to make Workshare Professional (Compare/Protect) compatible with a new DMS
- To install/uninstall specific Workshare Professional (Compare/Protect) features

When re-run, the WCA provides information on the progress of the installation and, if needed, messages about problems encountered. If a problem is encountered, the user can access the online Workshare knowledge base which provides an extended description and, where possible, a solution to resolve the problem.

The executable is named **WMConfigAssistant.exe** and is found in the **Modules** folder of the installation directory. To be run, the WCA requires administration rights to the workstation.

The WCA executable can be run from the command line, from within a DOS window or using a batch (.bat) file. This should only be attempted by the network administrator or other qualified personnel. The WCA can be run silently (without any user interface) and quietly (with a reduced user interface).

The WCA is also available from the Start Menu: Start > Programs > Workshare > Workshare Configuration Assistant.

To run the WCA from the command line, the following syntax should be used:

```
"C:\Program Files\Workshare\Modules\WMConfigAssistant.exe"
/INSTALL /SILENT /LOGFILE="\\InstallMachine\Workshare\
Workshare.log"
```

Where the switches can be:

Switch	Value
SILENT	Indicates that the WCA is to be run silently, with no user interface.
QUIET	Indicates that the WCA is to be run with a reduced user interface.
LOGFILE	Name and location of the WCA log file. For example, **LOGFILE="\\server\share\logfile.log"**. The log file can either be stored at a shared location or stored locally on the workstation. If a location is not specified for the log file it will be written to the local TEMP folder. By default, the log file is named **WorkshareConfig.log**. The WCA log file will provide details of all the steps the WCA has taken and can be passed to Workshare if any difficulties are encountered. The log file is appended to, not overwritten, in order to retain all logged information. Therefore, the latest details will be at the end of the log file.
NOTESINIFILE_PATH	Location of the notes.ini file. This should be specified in non-standard IBM Notes environments to ensure that Workshare components are added correctly to the INI file by the install.

Note: *The command must be entered on one line. You can use INSTALL, UNINSTALL, REINSTALL or REPAIR as the preceding switch. The use of " " should be used where there is character spacing in file paths.*

Workshare Microsoft Office integration

Workshare Professional (Compare/Protect) can be installed with or without Microsoft Office integration. If you want to change the integration of Workshare Professional (Compare/Protect) with Microsoft Office applications, go to the Control Panel, select the Workshare product and click **Change**. This will re-display the installation dialogs and you can change your integration settings.

By configuring Workshare Professional (Compare/Protect) to run without a Microsoft Office integration, for example, by deselecting the Microsoft Word add-in, there will be no Workshare tab available in Microsoft Word. In this case, the comparison functionality is only available from the Workshare comparison applications and the metadata removal functionality is only available when sending emails.

Workshare OCR functionality

Workshare Professional (Compare/Protect) includes OCR technology to enable comparison of PDFs that have been created directly from scanning. Where OCR has not been used and PDF files contain pure images of text, Workshare applies OCR to the files before performing comparisons.

Chapter 2: Installation on Single Workstation

This chapter describes the procedure for installing Workshare Professional (Compare/Protect) on a single workstation. It includes the following sections:

- **Installing Workshare**, page 19, describes the step-by-step procedure required to install Workshare Professional (Compare/Protect) on a single workstation.
- **Uninstalling Workshare**, page 22, describes how to uninstall Workshare Professional (Compare/Protect).
- **Upgrading Workshare**, page 22, describes how to upgrade Workshare Professional (Compare/Protect).

The procedure for installing Workshare Professional (Compare/Protect) across a network is described in *Chapter 6: Network Deployment*.

Installing Workshare

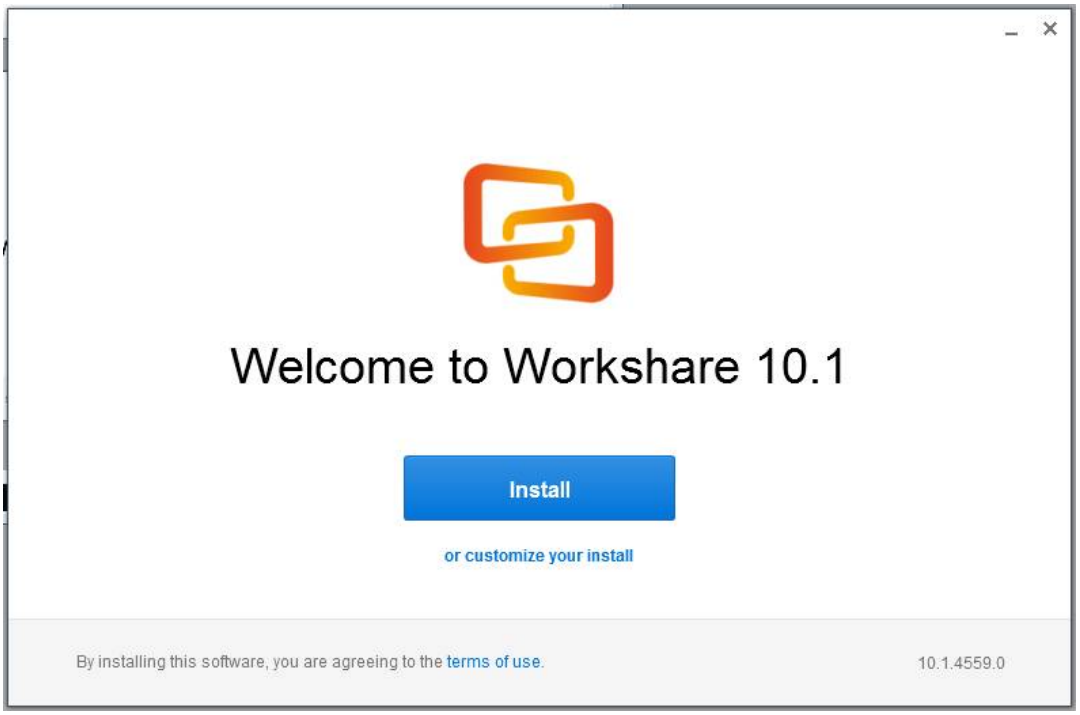
The following procedure explains how to install Workshare Professional (Compare/Protect) on a single workstation. Before beginning the installation procedure, make sure that all other programs are closed and disable any anti-virus software.

There is no need to uninstall previous versions of Workshare Professional (Compare/Protect). With an upgrade, any customized configuration settings are migrated from your existing installation to the new Workshare Professional (Compare/Protect) installation. When you are a doing a new install, the default configuration settings are installed. Refer to *Upgrading Workshare*.

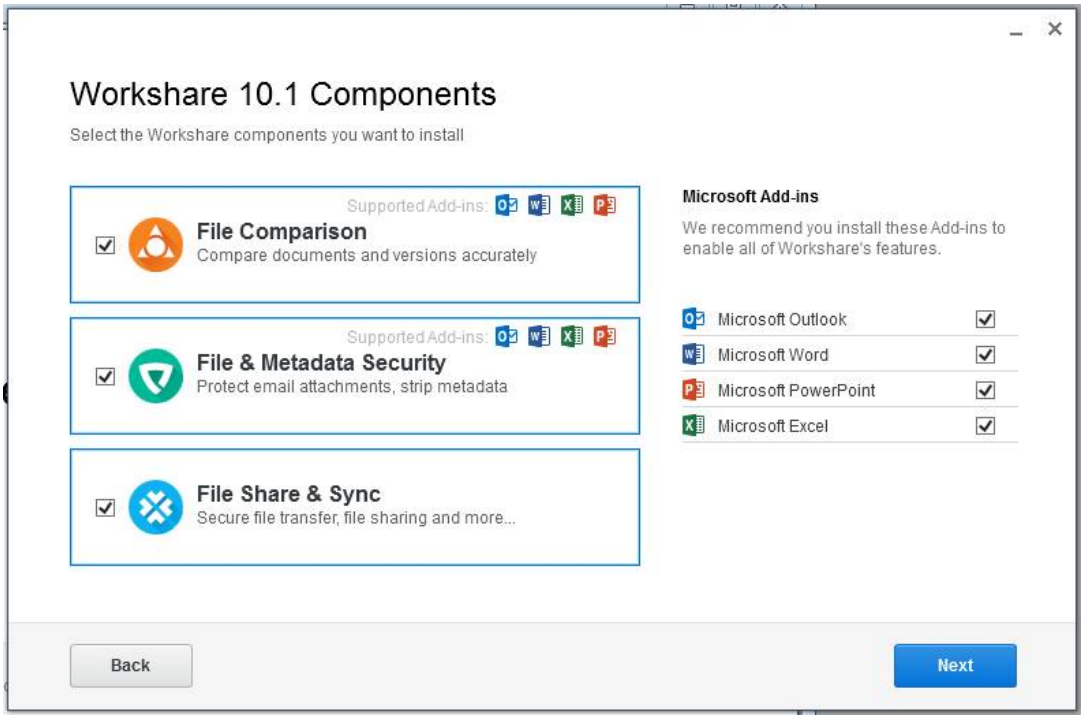
During the installation of Workshare Professional (Compare/Protect), you can select which functionality to install (file comparison, file & metadata security and file share & sync) and what Office integrations you want. You can also select which DMS integration(s) (if any) to install - OpenText, iManage, Worldox, SharePoint or NetDocuments.

To install Workshare:

1. Double-click the install executable. The Workshare installer is displayed.



2. If you want to select particular functionality or integrations, click "**or customize your install**". If not, jump to step 6.



3. Select from the following as available and as required:

   File Comparison: Enables you to compare documents.

   File & Metadata Security: Enables you to clean metadata from documents.

   File Share & Sync: Enables you to save and share files to Workshare online as well as synchronize between Workshare online and your desktop.

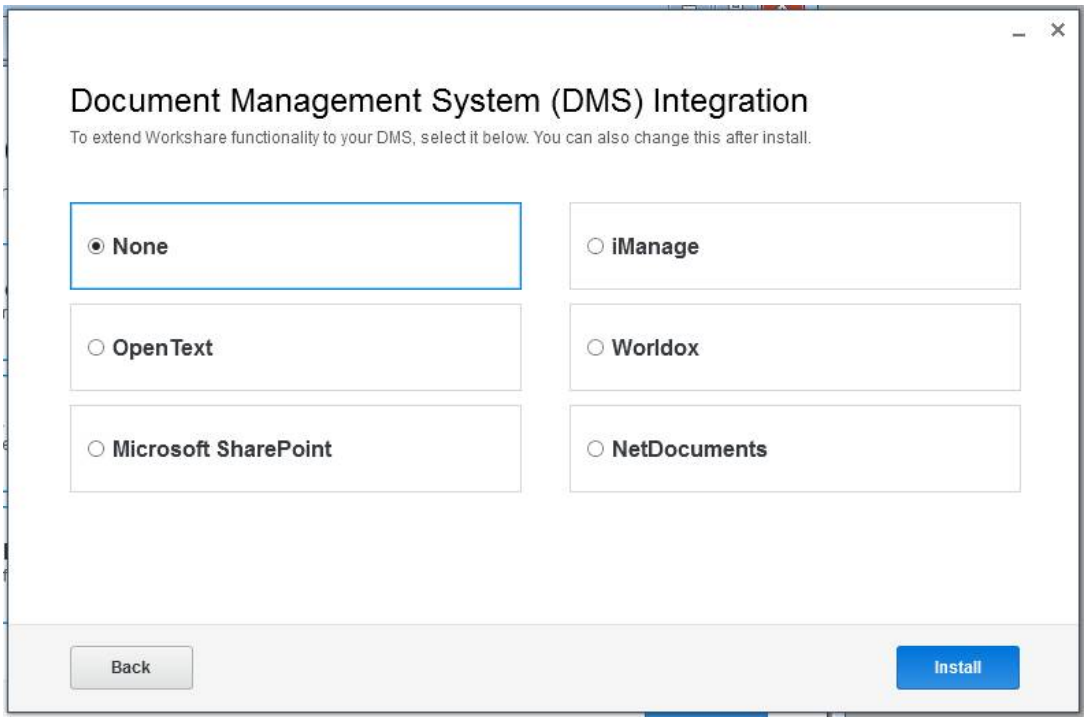
   Microsoft Outlook: Integrates Workshare Professional within Microsoft Outlook.

   Microsoft Word: Integrates Workshare Professional within Microsoft Word.

   Microsoft PowerPoint: Integrates Workshare Professional within Microsoft PowerPoint.

   Microsoft Excel: Integrates Workshare Professional within Microsoft Excel.

4. Click **Next**.



5. Select from the following as available and as required:

   OpenText: Integrates Workshare Professional within an OpenText DMS.

   Microsoft SharePoint: Integrates Workshare Professional within Microsoft SharePoint.

   iManage: Integrates Workshare Professional within an iManage DMS.

   Worldox: Integrates Workshare Professional with Worldox.

   NetDocuments: Integrates Workshare Professional with NetDocuments.

> ***Note**: Selecting a DMS here does not integrate Workshare's online functionality with the DMS. To integrate Workshare's online functionality with a DMS, download the relevant file from the **Services** tab of the Workshare Admin Console.*

6. Click **Install**. Workshare creates the necessary folders and copies files. The installation process may take a few minutes. (A progress bar indicates the progress of the installation.) Once the installation is complete, you may be required to restart your computer.

After install, the Workshare desktop app is launched with the Workshare login displayed enabling you to license Workshare Professional (Compare/Protect). Refer to *Chapter 3: Licensing*.

Note: *Ensure that the system user has write access to the policy sets folder - ProgramData/Workshare/PolicySets.*

Uninstalling Workshare

Workshare Professional (Compare/Protect) should be uninstalled using the Control Panel. Uninstalling Workshare Professional (Compare/Protect) will uninstall all the Workshare elements installed during the installation process.

Note: *The uninstall process will not uninstall any prerequisites installed.*

Upgrading Workshare

If you are upgrading from Workshare Professional 7, 8 or 9, you should install Workshare Professional (Compare/Protect) 10.1 using either the full .exe or using the .msi files. There is no need to perform an uninstall first.

Note*: Upgrading from the 32-bit version of Workshare Professional (Compare/Protect) to the 64-bit version is not supported. You must uninstall the 32-bit version of Workshare Professional (Compare/Protect) first and then install the 64-bit version. The same is true if you want to upgrade from 64-bit to 32-bit.*

By default, any customized local configuration settings will be migrated to the new installation. However, if you have changed the following configuration parameters in the **General** > **Administration** category, the result may be different:

- **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 Professional (Compare/Protect) 10.1 installation. This is selected by default.
- **Backup and migrate the default configuration for All Users**: If selected, when you are upgrading from an earlier version of Workshare Professional (Compare/Protect) all existing public settings and options are transferred to the Workshare Professional (Compare/Protect) 10.1 installation. This parameter is available in Administrator Mode only and is NOT selected by default.

If you are doing a new install, or if both these parameters are deselected, the default configuration settings are installed.

Before you upgrade…

Lightspeed clean will be the default metadata cleaning method regardless of whether you had it selected in previous installations. Therefore if you don’t want to use lightspeed clean, you must manually turn it off.

For a full description of the Workshare Professional (Compare/Protect) functionality, refer to the relevant Workshare user guide.

Chapter 3: Licensing

This chapter describes the licensing procedure for Workshare Professional (Compare/Protect). It includes the following sections:

- **Licensing Workshare**, page 25, describes the process for licensing Workshare Professional (Compare/Protect).
- **Standard Install**, page 27, describes how to license Workshare Professional (Compare/Protect) when installing on individual machines.
- **Deployment with User Authenticated License**, page 29, describes how to license Workshare Professional (Compare/Protect) with a User Authenticated license when rolling out to multiple users.
- **Deployment with Enterprise License**, page 33, describes how to license Workshare Professional (Compare/Protect) with an Enterprise license when rolling out to multiple users.
- **Renewing a License**, page 34, describes how to renew a Workshare Professional (Compare/Protect) license.

***Note**: You do NOT need to uninstall or remove any existing lic file. Workshare Professional (Compare/Protect) 10.1 will ignore it.*

Licensing Workshare

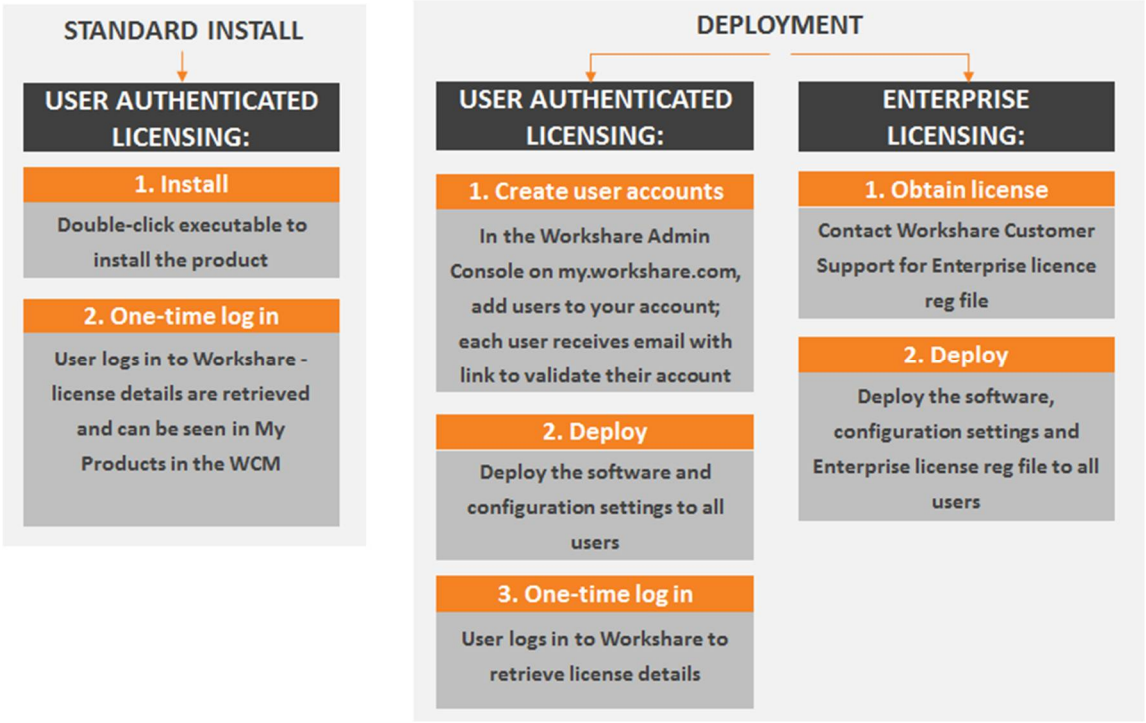
The first step of any installation is to purchase your product. To do so:

1. Create a Workshare account on my.workshare.com
2. Purchase your product
3. Download the installation file

A license is created and assigned to your account. In order to license your product, select the method most suited to your environment.

- **Standard Install**: When you are installing Workshare Professional (Compare/Protect) on individual machines, user authenticated licensing is recommended.
- **Deployment with User Authenticated License**: When your users will be using the online functionality (file share & sync) and you want an accurate view of license usage as well as the ability to track and manage users centrally, user authenticated licensing is recommended.
- **Deployment with Enterprise License**: When your users won't be using the online functionality (file share & sync) or you have restrictive firewall settings or you operate in a Citrix environment, enterprise licensing is recommended.

The steps in each method are outlined below:



How Workshare checks for licenses

Workshare Professional (Compare/Protect) checks the Registry for a license. Workshare always checks HKEY_CURRENT_USER (HKCU) for the license key first. If it finds it, Workshare will not look in HKEY_LOCAL_MACHINE (HKLM).

The process for user authenticated licensing works like this:

- When Workshare functionality is used, Workshare looks for the license in HKCU.
- When it can't find it in HKCU, Workshare checks HKLM.
- When it can't find it in HKLM, Workshare sends a request to my.workshare.com to get the key.
- The key is retrieved and put in HKCU.

The process for enterprise license deployments works like this:

- When the enterprise license key is first deployed, it's added to HKLM.
- The first time Workshare functionality is used, Workshare looks for the license in HKCU.
- When it can't find it in HKCU, Workshare checks HKLM.
- When Workshare finds the key in HKLM, it copies the key into HKCU.

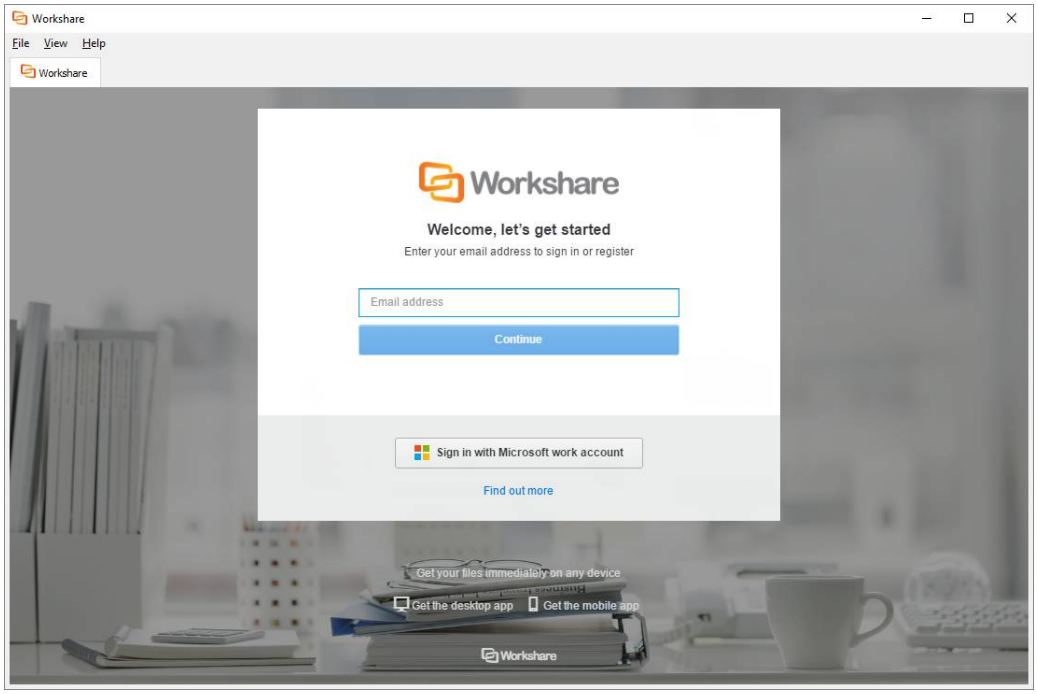
Standard Install

When you are installing Workshare Professional (Compare/Protect) on individual machines, user authenticated licensing is recommended. This is where users are required to have a Workshare account and sign in to Workshare on a one-off basis to retrieve their license entitlements.

One-time log in

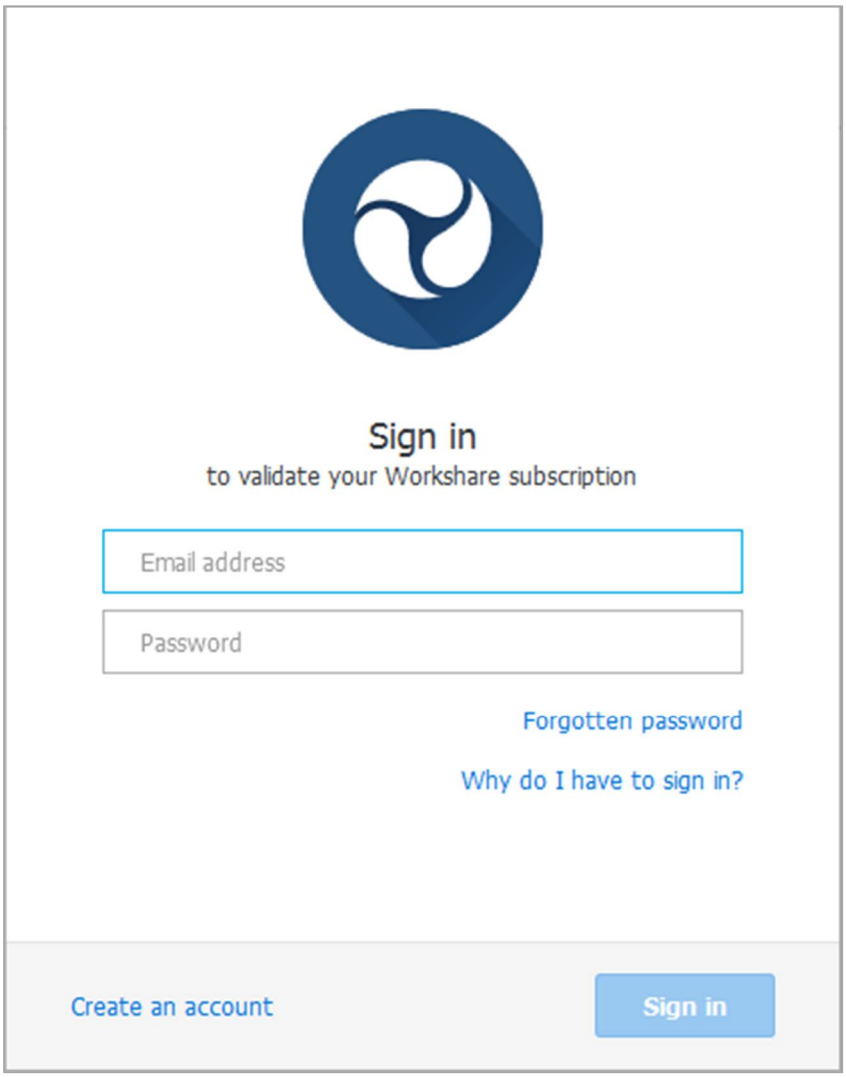
After installation, the user will log in to Workshare in order to retrieve their license entitlements. They will be prompted to do so in either of the following ways:

- When file share & sync is included in the installation, the Workshare desktop app is launched and they are prompted to log in to Workshare in order to retrieve their license entitlements.



If the user does not log in at this point or if file share & sync is not included in the installation, then….

- The first time a user accesses Workshare functionality, for example, by clicking any option in the Workshare tab, they are prompted to log in to Workshare in order to retrieve their license entitlements.



The user must enter their Workshare credentials (email address and password) and click **Sign in**. The license entitlements for your account are retrieved and shown in the **My Products** tab of the Workshare Configuration Manager.

Users who do not yet have a Workshare account can click **Create an account** in the login dialog. Workshare checks their email address and will automatically register them against your corporate Workshare account and update their license entitlement.

Prevent sign in dialog displaying

If you want to prevent the Workshare sign in dialog from appearing in order to get license information, you can set the following Registry key

- **32-bit Workshare on 32-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\General\GeneralAdmin SuppressSignIntoWorkshare=true`
- **32-bit Workshare on 64-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Wow6432Node\Workshare\Options\10.00\General\GeneralAdmin SuppressSignIntoWorkshare =true`
- **64-bit Workshare on 64-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\General\GeneralAdmin SuppressSignIntoWorkshare =true`

If you set this key, you will need to license your users using an enterprise license. Refer to *Deployment with Enterprise License*.

***Note**: Users will still be prompted to sign in if they are trying to share files or use other Workshare online functionality, even if this key is set.*

Deployment with User Authenticated License

When your users are using the Workshare file share & sync functionality and you want an accurate view of license usage as well as the ability to track and manage users centrally, user authenticated licensing is recommended. After you have deployed the product, your users are required to have a Workshare account and sign in to Workshare on a one-off basis to retrieve their license entitlements. To simplify this process, you can create accounts for your users from the Workshare Admin Console.

Create accounts for users

When you are deploying Workshare across your network, you should first add your users to your Workshare account. Users need a Workshare account so that they can log into Workshare in order to validate their entitlement to Workshare products and receive their license.

Adding users to your Workshare account is a simple process performed on the Workshare Admin Console and you may add them individually or up to 100 at one time using a CSV file. Users are people in your network using one of your Workshare licenses and all users share the same domain name.

***Note**: Any user who is part of your domain will be assigned to your company account even if they sign up for a personal account.*

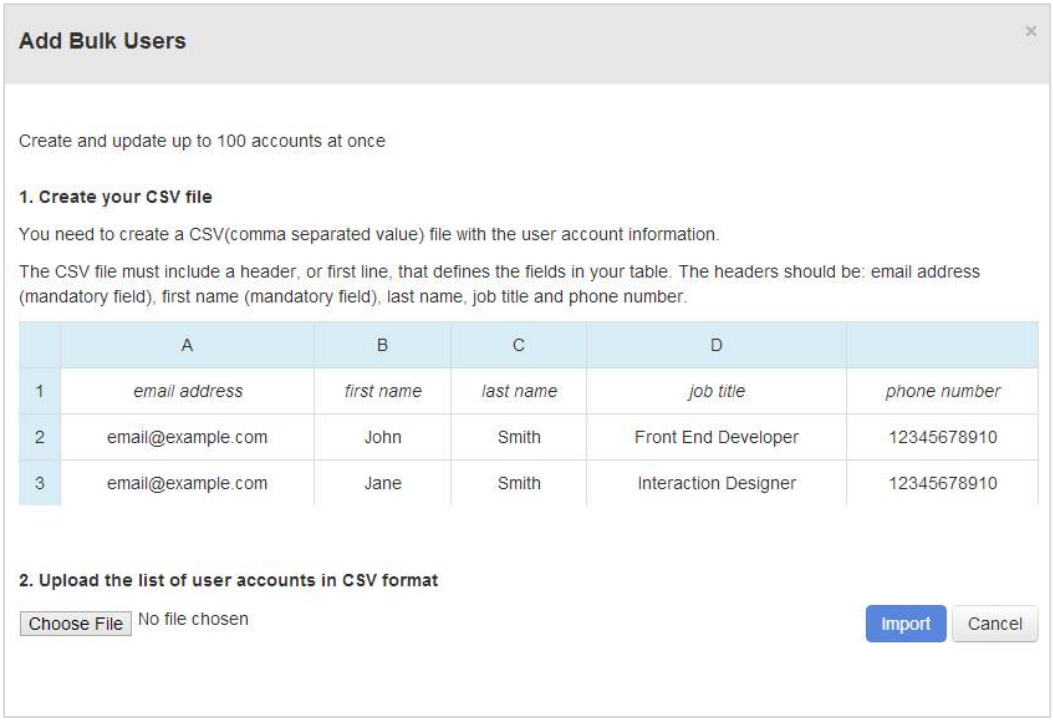
Adding a user “invites” that user to your Workshare account and they receive an email asking them to validate their account and create a password for it. Only when the invited user validates their account are they considered a licensed user on your account.

Tip! *A video describing this process can be found at https://www.youtube.com/watch?v=x1IxAut6lsg&feature=youtu.be.*

If you do not have access to the Admin Console, you can create accounts for your users following the procedure in *Create accounts without the Admin Console*.

To add multiple users:

1. Create a CSV file containing the user account information (up to 100 users). Ensure the file has the following mandatory headers: “email address” and “first name”. You may also include the following headers: “last name”, “job title” and “phone number”.
2. Go to my.workshare.com and log in to your account.
3. Click your user name in the topbar and select **Admin Console**.
4. Select the **User Management** tab.
5. Click **Add Bulk Users**.



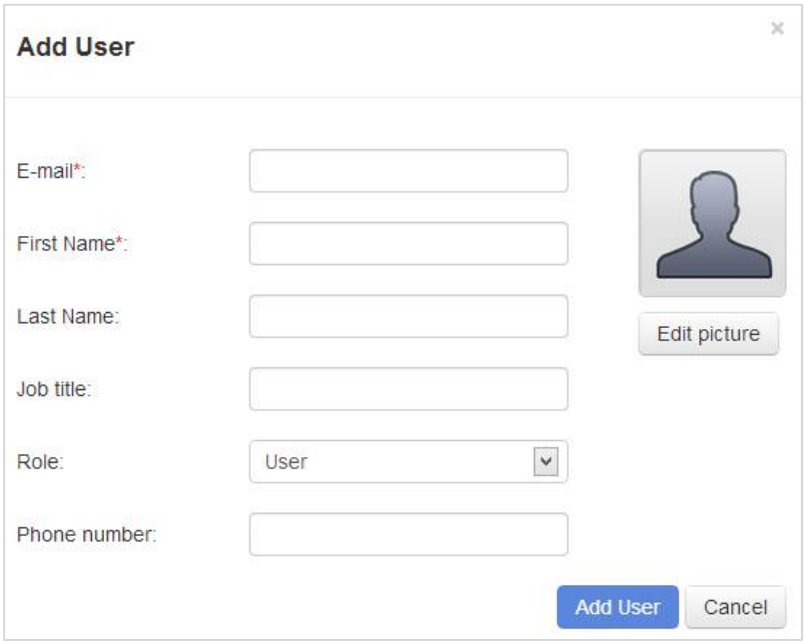
6. Click **Choose File** and browse to where you have saved your CSV file with all your user details.
7. Select the file and click **Open**.

8. In the *Add Bulk Users* window, click **Import**. The user details are added to your account and a registration email is sent to all the email addresses specified, inviting them to validate their Workshare account.

Your users will appear in the **User Management** tab.

To add a single user:

1. In the **User Management** tab of the Admin Console, select **Add User**.



2. In the **E-mail** field, enter an email address for the user – this must be from your registered email domain.
3. In the **First Name** field, enter a name for the user.
4. Complete the other fields and add a picture for the user if required. The user will be able to edit these personal settings when they have validated their account. The user cannot change their registered email address.

> ***Note**: The default role for a user is that of **User**. If you want to create an administrator user with access rights to the Admin Console, select **Account Admin** from the **Role** dropdown list.*

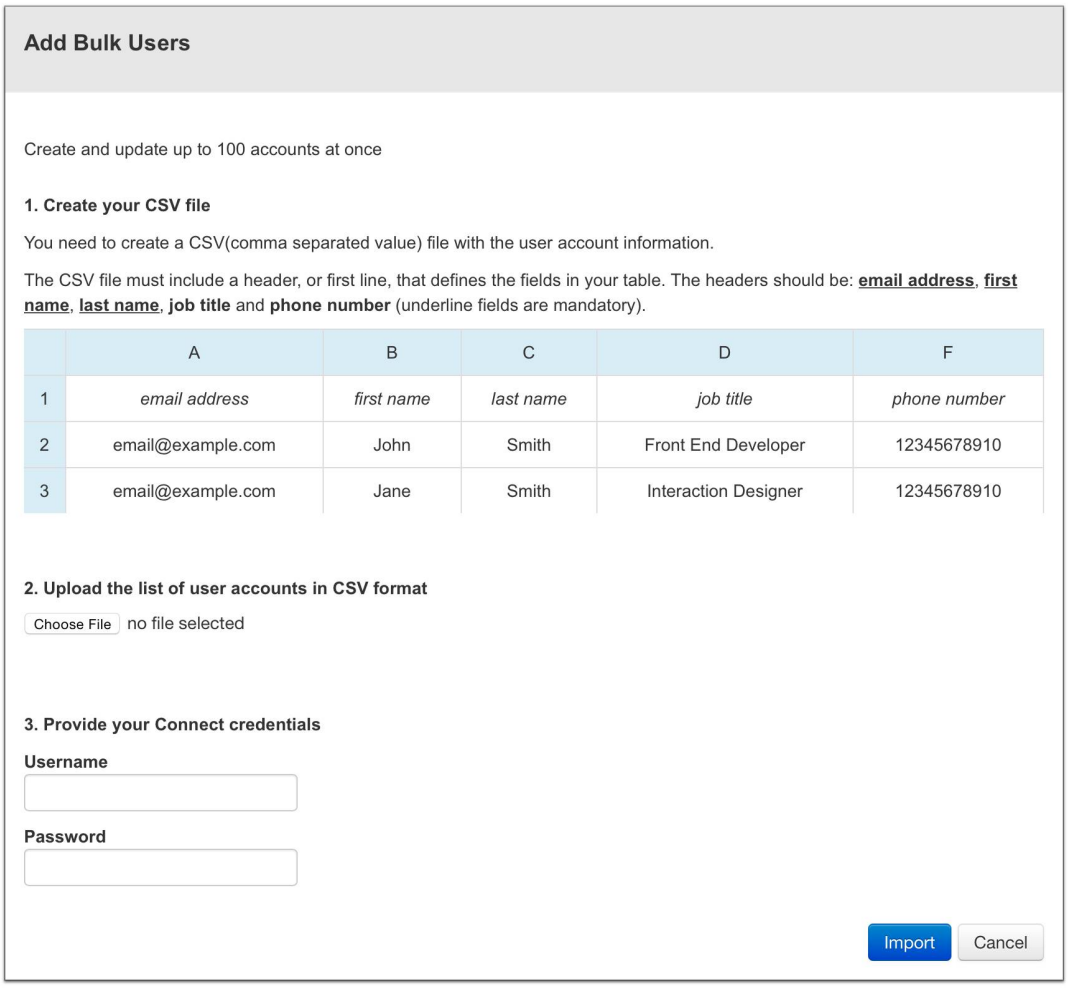
5. Click **Add User**. A registration email is sent to the email address specified and the user is invited to validate their Workshare account.

Create accounts without the Admin Console

If you do not have access to the Workshare Admin Console, you can create accounts for your users using the following link: http://workshare.force.com/knowledgebase/CustomerUploads.

To add users:

1. Click http://workshare.force.com/knowledgebase/CustomerUploads. This will display the following page:



2. Create a CSV file containing the user account information (up to 100 users). Ensure the file has the following mandatory headers: “email address” and “first name”. You may also include the following headers: “last name”, “job title” and “phone number”.
3. Click **Choose File** and browse to where you have saved your CSV file with all your user details.
4. Select the file and click **Open**.

5. Enter your Workshare login credentials in the **Username** and **Password** fields.
6. Click **Import**. The user details are added to your account and a registration email is sent to all the email addresses specified, inviting them to validate their Workshare account.

Deployment with Enterprise License

When your users won't be using the Workshare file share & sync functionality or you have restrictive firewall settings or you operate in a Citrix environment, enterprise licensing is recommended. An enterprise license comes in the form of a Registry file that can be deployed across your network.

Contact Workshare Customer Support to request an enterprise license. Workshare Customer Support will send you a Registry file that you can install on your machine by double-clicking. To install the license on your users' machines, deploy the Registry file across your network using your preferred method.

***Note**: You may receive several Registry files – use the one appropriate to your environment.*

Registry location

Installing the REG file adds the license (adding keys and values) to the Registry in the following location:

32-bit Workshare on 32-bit Windows: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\Internal\Subscription\Features`

32-bit Workshare on 64-bit Windows: `HKEY_LOCAL_MACHINE\Software\Wow6432Node\Workshare\Options\10.00\Internal\Subscription\Features`

64-bit Workshare on 64-bit Windows: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\Internal\Subscription\Features`

Depending on the products purchased, one or both of the following keys are added – Compare and Protect. Each one includes a **Value** named "Feature" with the content of the license feature string set as the **Value data**.

End user interaction

After deployment, the license will be installed in the Registry on each of your user's machines and they can use the Workshare products. There will be no need for the end user to log in to Workshare.

Capturing of email

Enterprise licenses may capture a user's email address. If you do not want Workshare to capture the email addresses of your users at all, you should include the following switch with your install script.

```
CAPTURE_EMAIL
```

When this parameter is set to CAPTURE_EMAIL=NO, the install sets or updates the Workshare option in the Registry - **SubscriptionCaptureEmail** to **False**.

> ***Note**: This is an admin/HKLM only option in HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Workshare\Options\10.00\General\GeneralAdmin; it is not visible in the Workshare Configuration Manager (Admin mode).*

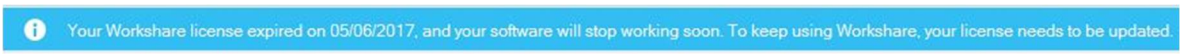
When the Registry option is **False**, Workshare does not send the user email address as part of the validation call for licensing and as a result a Workshare account will not be provisioned.

Renewing a License

When a user is in a licensed state, they will not receive any notifications that their license is about to expire. Only you, the administrator, will receive an email that your renewal is due.

Once the license expiry date has passed, users will be notified that the license has expired and needs to be updated, but they can continue using the software for a period of time.

This notification is in the form of a banner in Outlook or Compare. It is displayed daily but once dismissed by a user, it will not be displayed again until the next day.



If you want to stop users receiving these license notifications, you can set the following Registry key.

- **32-bit Workshare on 32-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\General\GeneralAdmin SuppressNag=true`
- **32-bit Workshare on 64-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Wow6432Node\Workshare\Options\10.00\General\GeneralAdmin SuppressNag=true`
- **64-bit Workshare on 64-bit Windows**: `HKEY_LOCAL_MACHINE\Software\Workshare\Options\10.00\General\GeneralAdmin SuppressNag=true`

Once you have renewed your license, Workshare will automatically refresh your users' licenses -- you don't need to redeploy a .REG file; your users don't have to sign in.

***Note**: If you have renewed your license and this notice is shown again, click **Refresh** in the **My Products** page of the Workshare Configuration Manager to update and validate your renewed license.*

If you have restrictive firewall settings or if you are using a proxy server, whitelist or add the following domain name and port as an exception:

- *.workshare.com
- Port 443

Trial users

When you are running a trial of Workshare, you have a trial (evaluation) license. During the trial, users will receive a daily message informing them that they are in a trial. This message is in the form of a banner, similar to the following:



The message notifies the user of the date the trial will end and also provides a link to get a license.

If you do not obtain a license before the end of the trial, users will be unable to use any Workshare functionality once their trial ends.

Chapter 4: Configuration

This chapter describes how to use the Workshare Configuration Manager to configure Workshare. It includes the following sections:

- **Introducing the Workshare Configuration Manager**, page 37, provides an overview of the Workshare Configuration Manager and how you can use it to customize Workshare behavior to suit your organization's requirements.
- **Accessing the Workshare Configuration Manager**, page 39, describes how to access the Workshare Configuration Manager and its parameters.
- **Setting Parameters**, page 42, describes how to save configuration parameters to a configuration file as well as deploy the configuration file to other Workshare workstations.
- **Deploying Configuration Settings**, page 43, describes how to save policy sets and distribute them to other Workshare workstations.
- **Registry Configuration**, page 48, describes additional configuration performed directly in the Registry.

Introducing the Workshare Configuration Manager

The Workshare Configuration Manager is a separate configuration utility that enables you to configure Workshare and the way it behaves as well as modify the configuration of the default profile (via the parameters in the Protection category).

***Note**: A profile is a set of policies which contain parameters applied by Workshare when determining content risk.*

Administrator Mode and User Mode

The Workshare Configuration Manager has two modes as follows:

- **Administrator Mode**: This mode should be used by administrators to make changes to the default settings on the local machine. Settings made are saved in HKEY_LOCAL_MACHINE in the Registry.
- **User Mode**: This mode should be used by users to make changes to the Workshare configuration to suit their own personal preferences on the local machine. Other users could log in and they would not have the same configuration settings. Settings made are personal to the user and saved in HKEY_CURRENT_USER in the Registry.

When Workshare is first installed, the default configuration settings (factory defaults) are included in the installation and the Registry is empty of any of the Workshare Configuration Manager configuration settings. Once an administrator clicks **Apply to Local Machine** in the Administrator Mode of the Workshare Configuration Manager, the Registry (HKEY_LOCAL_MACHINE) is updated with any changes. Once an administrator clicks **Apply to Current User** in the Administrator Mode of the Workshare Configuration Manager, the Registry (HKEY_ CURRENT_USER) is updated with any changes. Additionally, when a user clicks **Apply** in the User Mode of the Workshare Configuration Manager, the Registry (HKEY_CURRENT_USER) is updated with any changes.

When determining what value to assign to each configuration parameter, or when generating the default policy, Workshare looks in the following locations in the following order:

1. HKEY_LOCAL_MACHINE just for the **IgnoredUserOverrides** key to see what parameters have been locked by the administrator
2. HKEY_CURRENT_USER
3. HKEY_LOCAL_MACHINE
4. WMOption.dll which contains an XML file with the factory defaults

It is important to remember that a user's preferences will take precedence over the default settings and the factory defaults. However, configuration parameters can be locked so that a user is unable to change the value of any given parameter.

You can use Administrator Mode of the Workshare Configuration Manager to establish global settings that standardize the use of Workshare across your organization. Once you have finalized the configuration, you can save the settings as an ADM or REG file and deploy to the Workshare workstations in your network. Refer to *Deploying Configuration Settings*, page 43.

***Note**: An ADM file is a group policy template file that can be rolled out using Group Policy. The ADM configuration file can be created using the Workshare Configuration Manager.*

The Workshare Configuration Manager can be installed as a standalone application if required. This would enable you to establish a global set of configuration parameters and deploy them company wide. As a standalone application, only the Administrator Mode of the Workshare Configuration Manager is available.

The Workshare Configuration Manager – User Mode will only show those options which are applicable to the modules which are currently configured for that user. The Administrator Mode will show all options regardless of which product is installed and what modules are configured.

Default policy

When Workshare is checking email attachments or open Microsoft Office documents for content risk or metadata, it uses the default policy to determine if there is a risk.

***Note**: When Interactive Protect is configured, Workshare checks email attachments against settings in the Registry.*

The default policy is a set of parameters configured in the Protection category of the Workshare Configuration Manager and saved in a file called WorkshareClient.runtimepolicy file.

The WorkshareClient.runtimepolicy file is automatically generated from the Registry in the following scenarios:

Action	Location of WorkshareClient.runtimepolicy
Workshare installation	ProgramData/Workshare/PolicySets/ClientProfiles/Default
Re-running the Workshare Configuration Assistant	ProgramData/Workshare/PolicySets/ClientProfiles/Default

Action	Location of WorkshareClient.runtimepolicy
Applying changes in Administrator Mode of the Workshare Configuration Manager	ProgramData/Workshare/PolicySets/ClientProfiles/Default
Applying changes in User Mode of the Workshare Configuration Manager	Users/[current user]/AppData/Roaming/Workshare/PolicySets/ClientProfiles/Default
Changing Registry values in the Registry which correspond to the Protection category options	Users/[current user]/AppData/Roaming/Workshare/PolicySets/ClientProfiles/Default

Note: *If you do not want the default policy files to be automatically regenerated in these scenarios, ensure the* ***Enable automatic generation of default profile*** *parameter (****Protection****>****Administration*** *category) is NOT selected. If this option is set off BEFORE the installation of Workshare, you must ensure you have created and placed your own security policy in the Client Default folder in the ProgramData/Workshare/PolicySets/ClientProfiles location.*

When applying the default policy, Workshare will look first in the user location (Users/[current user]/AppData/Roaming/Workshare/PolicySets/ClientProfiles/Default) and if it does not find a WorkshareClient.runtimepolicy file there, it will look in the public location (ProgramData/Workshare/PolicySets/ClientProfiles/Default).

Note*: If you want to create additional security policies, you should use the Workshare Policy Designer and save each .runtimepolicy in a separate directory in ProgramData/Workshare/PolicySets/ClientProfiles.*

Accessing the Workshare Configuration Manager

The Workshare Configuration Manager – User Mode can be accessed from within Microsoft Office or from the Start menu.

Note*: When the Workshare Configuration Manager is installed as a standalone application, only the Administrator Mode is available and it is accessed from the Start menu.*

To access the Workshare Configuration Manager from Microsoft Office:

1. In Microsoft Office, click **Options** in the *Workshare* tab, **Options** group. The Workshare Configuration Manager opens in User Mode.
2. To access Administrator Mode, click **Launch Administrator Mode**.

To access the Workshare Configuration Manager from the Start menu:

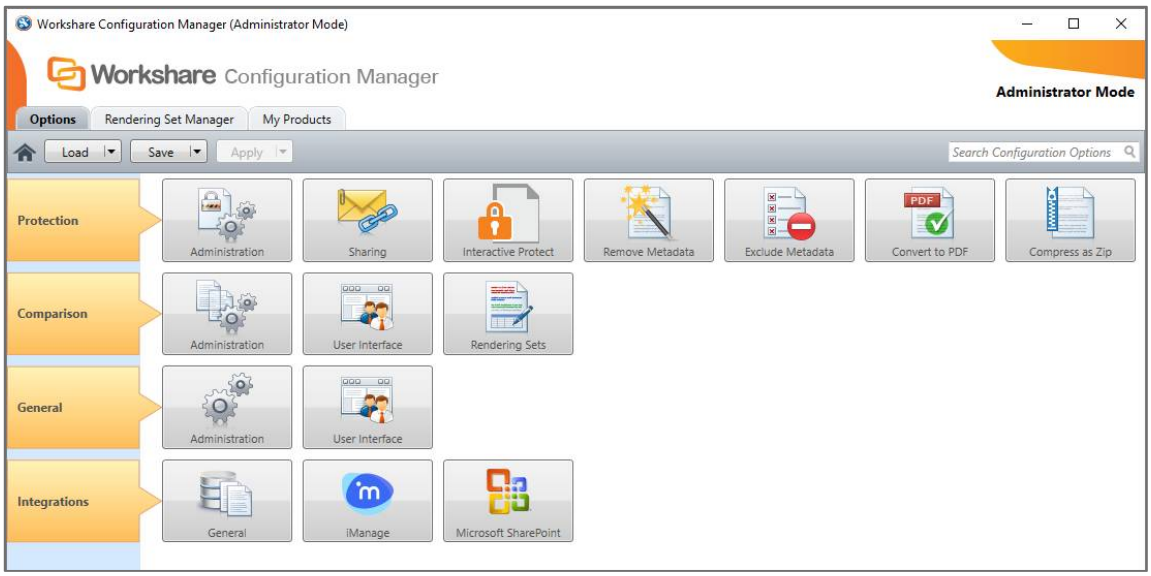
- When the Workshare Configuration Manager is installed as part of Workshare Professional/Compare/Protect, from the Start menu, select **Workshare Configuration (User Mode)**. The Workshare Configuration Manager opens in User Mode. To access Administrator Mode, click **Launch Administrator Mode**.
- When the Workshare Configuration Manager is installed as a standalone application, from the Start menu, select **Workshare Configuration**. The Workshare Configuration Manager opens in Administrator Mode.

To access the Workshare Configuration Manager from Workshare Compare:

1. Open Workshare Compare.
2. From the File menu, select **Workshare Config Manager**. The Workshare Configuration Manager opens in User Mode.
3. To access Administrator Mode, click **Launch Administrator Mode**.

In Administrator Mode, the state of the options reflects the settings in HKEY_LOCAL_MACHINE in the Registry.

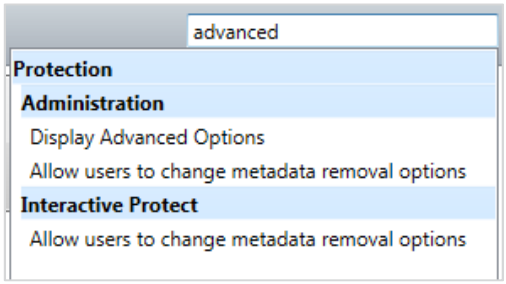
***Note**: In order to access Administrator Mode, you must have local administrator rights. In Windows Vista and above, when UAC (user access control) is enabled, the User Access Control dialog is displayed when you click **Launch Administrator Mode**. If you do not have administrator rights, you can enter a user name and password to elevate you to administrator. If you do have administrator rights, you need to allow the Workshare Configuration Administrator Console (Workshare Configuration Manager) to access this computer. Click **Yes** and Administrator Mode is launched.*



The configuration parameters for Workshare are grouped into categories (such as Protection, Comparison) and sub-categories (such as Administration, User Interface). In User Mode, categories are available according to your installation. Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in the *Workshare Configuration Options* guide.

Searching parameters

If you know the name of a parameter (or part of its name) but not its location, you can search the Workshare Configuration Manager using the search box on the top right.



Click the parameter in the results list and the relevant category and sub-category is displayed in the Workshare Configuration Manager.

Setting Parameters

Most parameters in the Workshare Configuration Manager are set by selecting or deselecting a checkbox. There are also some that require you to enter a value in a text box.

To specify parameters:

1. In the Workshare Configuration Manager, select a category and then a sub-category.
2. Set a value for a parameter by selecting or deselecting the checkbox or by entering a value in the text box.



3. Click the padlock icon to unlock/lock a parameter. When you lock a parameter, a user is not able to change the setting.

> ***Note**: The icon to the right of a parameter indicates that the parameter value has been changed. In Administrator Mode, the green arrow deployment icon is shown when a parameter will be included in a deployment script.*

4. Continue to select categories and sub-categories and specify parameters as required.
5. Save your settings by clicking **Apply to Local Machine**. The Registry (HKEY_LOCAL_MACHINE) is updated with any changes.

   A confirmation message is displayed once the settings have been saved.
6. Click **OK**.

> ***Note**: The icon is no longer displayed to the right of changed parameters but the green arrow deployment icon will remain.*

Recipient checking

You can specify different metadata removal settings for email attachments sent internally and externally. For example, you may want to remove all hidden data when sending emails externally, but only remove track changes and hidden text when emailing internally. Workshare determines whether a recipient is external or internal as follows.

Workshare takes each recipient in the **To**, **Cc** and **Bcc** fields, and looks them up in the configured address book(s). Usually this is the contacts list or local address book (on your machine) and the global address book (on the server).

Note: *To ensure that Workshare can integrate with the local and global address books when users are offline, please refer to* Chapter 4: Integration.

For each address there are three possible outcomes:

- The address does not exist in any address book. This is then processed as external.
- The address is a distribution list. In this case, the address of each member of the distribution list is checked.
- The address exists in one of the address books. If so, Workshare does a further check that checks the type of address. Either it will be an Exchange\Notes address (meaning the address exists on the email server), or it will be an SMTP address (meaning the email will be routed via the Internet). If it is a server address, it is processed as internal. If it is an SMTP address, it is processed as external.

When deciding which metadata removal options to apply, each recipient is checked. If an external recipient is found, external metadata removal settings are applied. Only if all recipients are internal, are internal metadata removal settings applied.

Note*: Using the* ***Treat the specified addresses as internal (Outlook)*** *parameter (****Protection > Administration*** *category), you can specify external email addresses that you would like to be treated as internal for the purpose of Workshare applying policies.*

Deploying Configuration Settings

In Administrator Mode, you can save the configuration settings as an ADM or REG file. This will enable you to distribute these settings to other machines without having to manually set the options on each machine. You set the configuration parameters for Workshare in a test installation or on any workstation with the Workshare Configuration Manager installed, save the configuration settings in an ADM or REG file and then deploy them to other Workshare workstations. This saves time and enables a consistency within your organization.

Additionally, you can save the configuration settings as a WSO file (Workshare Options file). A WSO file can be loaded in the Workshare Configuration Manager so you can restore the settings at some point in the future. This enables you to keep a work-in-progress or project file.

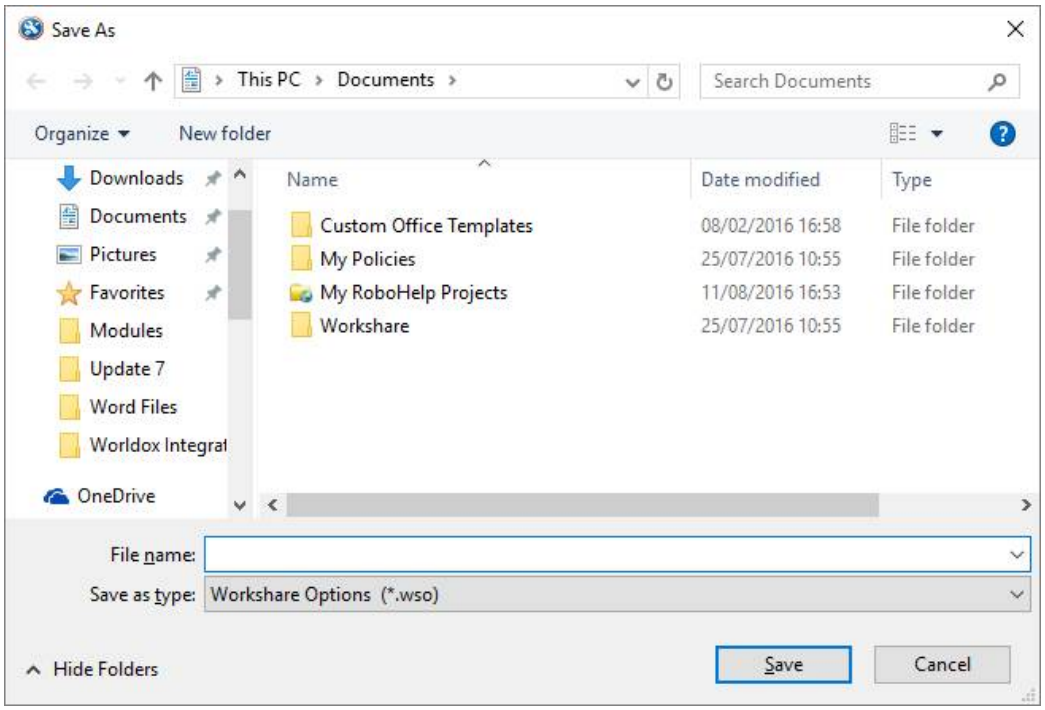
Finally, Workshare has created ADM files which contain all the options and their default values. These files are very similar to the files created by the Workshare Configuration Manager but contain placeholders for an unconfigured DMS server. Contact Workshare Customer Support for these files.

Saving configuration files

Configuration settings are saved in Administrator Mode of the Workshare Configuration Manager.

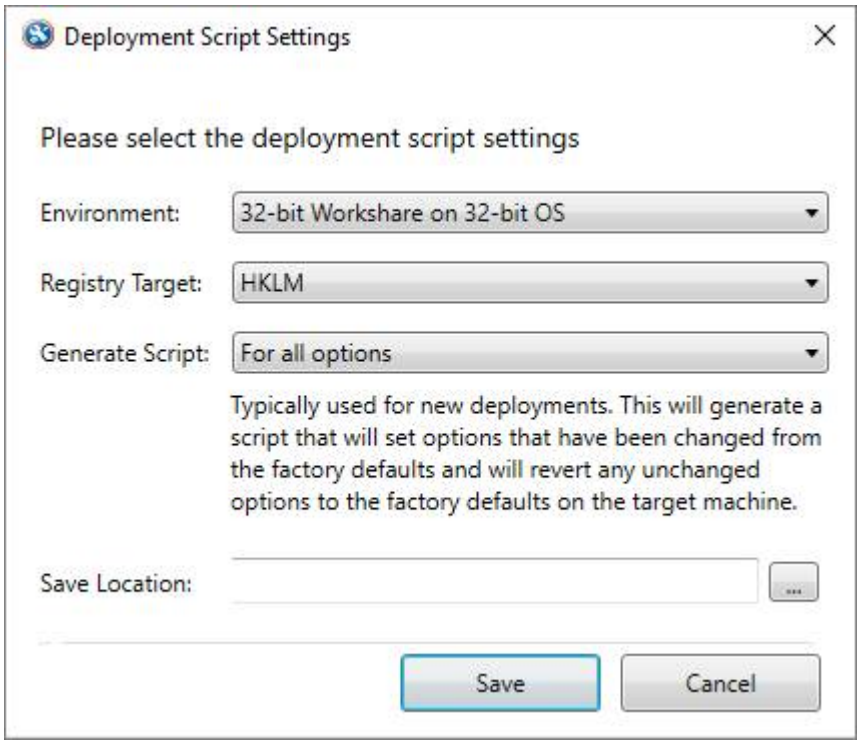
To save configuration settings:

1. In Administrator Mode of the Workshare Configuration Manager, specify configuration parameters as required. Refer to *Setting Parameters*.
2. Click the arrow on the **Save** button and select from the following:
   - **Save as Workshare Options**: To save the settings in a WSO file which can be loaded/opened in the Workshare Configuration Manager at a later time.
   - **Save Deployment Script**: To save the settings in an ADM or REG file which can be used to deploy to other workstations.
3. When selecting to save as a Workshare Options file, a *Save As* dialog is displayed.



4. Name the file as required, navigate to the save location and click **Save**. The settings are saved in a WSO file which can be loaded in the Workshare Configuration Manager at a later time.

5. When selecting to save as a deployment script, the *Deployment Script Settings* dialog is displayed.



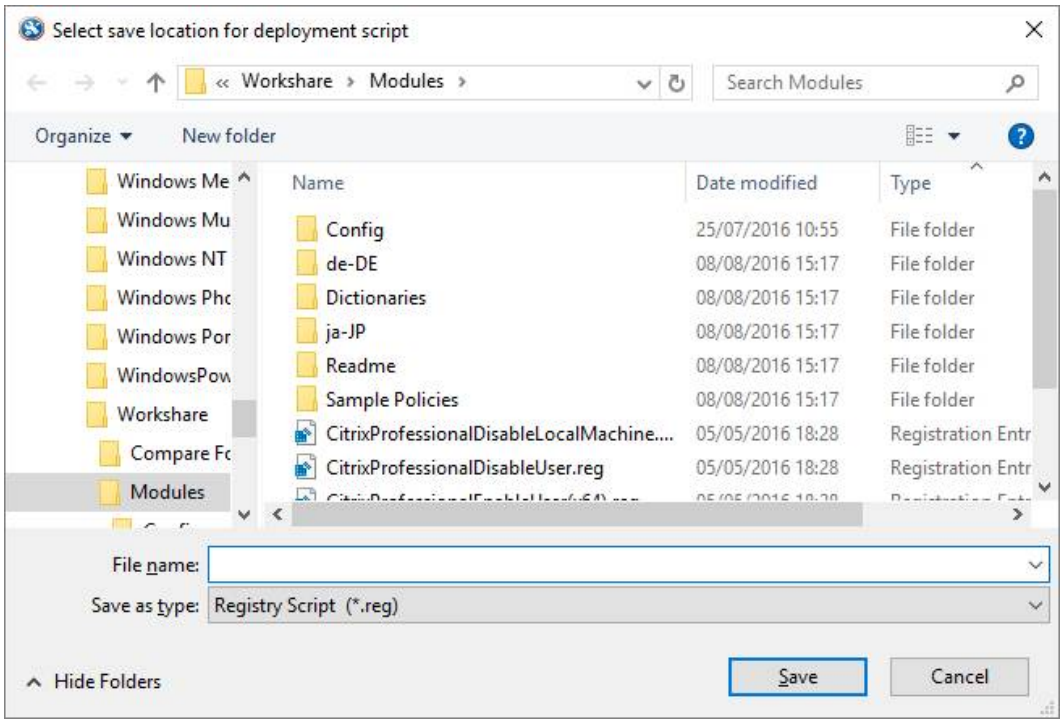
6. From the **Environment** dropdown list, select your environment.
7. From the **Registry Target** dropdown list, select where in the Registry you want to save the settings.

> ***Note**: Selecting HKCU will replace any personalized settings configured by an individual user on this machine.*

8. From the **Generate Script** dropdown list, select the type of file to generate. You can create a script:
   - **For all options**. The resulting ADM or REG file will contain all options. A REG file will set options that have been marked with the deployment icon and remove all other options by deleting them from the Registry. This will revert them to the factory default on the target machine. The ADM file will contain all the options and use the values defined by the administrator as the default values. Typically, this is used for new deployments – it will generate a script that will set options that have been changed from the factory defaults and revert any unchanged options to the factory defaults on the target machine.

- **For options with a deployment icon**. The resulting ADM or REG file will only contain those options indicated by a green deployment icon. No other options will be deployed or changed. Typically, this is used when upgrading an existing deployment – it will generate a script that will only set options that have been changed (indicated by the green arrow icon) and will not modify any unchanged options on the target machine.

9. In the **Save Location** field, click the browse button.



10. Name the file as required, navigate to the save location.
11. From the **Save as type** drop down list, select **ADM File** or **Registry Script** as the file type.
12. Click **Save**.
13. Click **Save** in the *Deployment Script Settings* dialog. The settings are saved to the specified ADM or REG file.

You can now deploy the REG file or use the ADM template to deploy settings to other individual Workshare workstations.

Loading configuration files

If you have saved the configuration settings as a Workshare Options (WSO) file, you can open the saved WSO file in the Workshare Configuration Manager. You can then update the settings on the local machine or continue developing a set of configuration parameters for future deployment. The save and re-load functionality enables you to keep a work-in-progress or project file.

To load a configuration file into the Workshare Configuration Manager:

In Administrator Mode of the Workshare Configuration Manager, click the arrow on the **Load** button and select from the following:

- **Load Workshare Options**: Enables you to browse to a WSO file.
- **Load Defaults**: Resets all the parameters to their factory default settings.
- **Load User Settings**: Resets all the parameters to the settings specified in the running user's HKEY_CURRENT_USER Registry hive.

> ***Note**: When you provide user credentials to the UAC prompt then that user is the running user.*

The selected settings are displayed in the Workshare Configuration Manager.

Upgrading

By default, when you deploy Workshare to machines which have earlier versions of Workshare Professional/Compare/Protect, all local settings and options are transferred. If you don't want to migrate the existing options and settings to the new installation, or you want to include public settings too, you can change the following parameters in the **General** > **Administration** category:

- **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 10 installation. This is selected by default.
- **Backup and migrate the default configuration for All Users**: If selected, when you are upgrading from an earlier version of Workshare all existing public settings and options are transferred to the Workshare 10 installation. This parameter is available in Administrator Mode only and is NOT selected by default.

If you are doing a new install, or if both these parameters are deselected, the default configuration settings are installed.

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.*

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.

Chapter 5: Integration

This chapter describes how to integrate Workshare with your email systems and DMS. It includes the following sections:

- **Introduction**, below, introduces integrating Workshare with your email systems and DMSs.
- **Document Management Systems Integration**, page 52, describes how to integrate Workshare with your iManage, OpenText, Worldox, NetDocuments or SharePoint DMS.
- **Email System Integration**, page 73, describes how to integrate Workshare with your email system.

Introduction

Document Management Systems

Workshare has been tested and certified in a number of DMS environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support (support@workshare.com) for any help.

***Note**: Unless otherwise stated, all environments are the English version with the en-us language set.*

DMS integration for Workshare 10 (32-bit version)

Check with your DMS vendor about which Windows operating system supports your DMS.

- **NetDocuments**

  ndOffice must be installed to use the Workshare NetDocuments integration.

  ***Note**: If you want Workshare to be available when using the NetDocuments **Send to application** functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).*

- **iManage clients:**
  - FileSite/DeskSite 9.0 Update 6 and above
  - Work 10 Desktop for Windows 10.0 and above
  - Work 10 web client (You will need to install Workshare iManage Integration Server in order to launch comparisons from the iManage browser interface.)

  ***Note**: If it's a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91.*

- **OpenText:**
  - eDOCS DM 16.3
  - eDOCS DM 10
  - eDOCS DM 5.3.1 COM only (Patch 6)
- **Worldox:**
  - GX4

Workshare will endeavor to support future service packs of certified environments.

DMS integration for Workshare 10 (64-bit version)

Check with your DMS vendor about which Windows operating system supports your DMS.

- **NetDocuments**

  ndOffice must be installed to use the Workshare NetDocuments integration.

  > ***Note**: If you want Workshare to be available when using the NetDocuments **Send to application** functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).*

- **iManage clients:**
  - FileSite/DeskSite 9.3 (64 bit) and above
  - Work 10 Desktop for Windows 10.0 (64 bit) and above
  - Work 10 web client (You will need to install Workshare iManage Integration Server in order to launch comparisons from the iManage browser interface.)

  > ***Note**: If it's a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91.*

- **OpenText:**
  - eDOCS DM 16.3
  - eDOCS DM 10

Workshare will endeavor to support future service packs of certified environments.

Email systems

Workshare is certified with the following email systems:

- **Workshare Professional 10 (32-bit version)**
  - Microsoft Outlook 365 (desktop)
  - Microsoft Outlook 2019 (32 bit)
  - Microsoft Outlook 2016 (32 bit)
  - Microsoft Outlook 2013 SP1 (32 bit) + Japanese
  - IBM Notes 9.0.1 FP7, FP8 and FP9

  > ***Note**: Interactive Protect and the replace email attachment with link features of Workshare are not supported in a Notes environment.*

- **Workshare Professional 10 (64-bit version)**
  - Microsoft Outlook 365 (desktop) (64 bit)
  - Microsoft Outlook 2019 (64 bit)
  - Microsoft Outlook 2016 (64 bit)

- Microsoft Outlook 2013 SP1 (64 bit)

During installation, Workshare automatically detects your email system and configures itself to work with that system. If you work with both IBM Notes and Microsoft Outlook, Workshare is configured to work with IBM Notes.

Workshare will endeavor to support future service packs of certified environments.

Document Management Systems Integration

iManage integration – configuring server integration

In order to use Workshare with an iManage DMS, you must add the Workshare file types and the Workshare comparison applications to the iManage server so that the DMS can recognize and work with Workshare files. Additionally, it is necessary to add Workshare as an iManage class.

***Note**: The following procedures show the process for a WorkSite server. The process may vary slightly for a Work 10 server.*

Adding file types to the iManage server

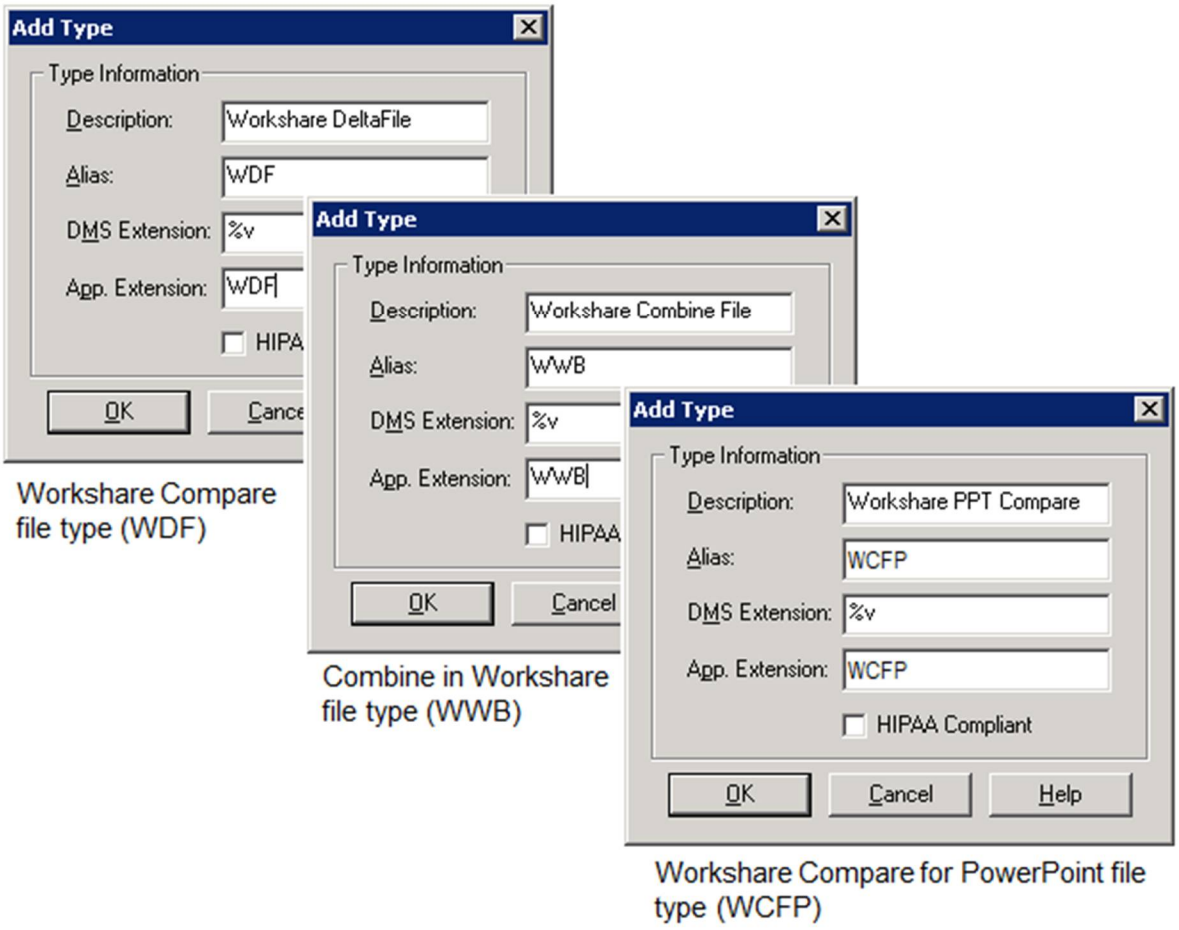
This step includes adding the Workshare Compare file type (WDF), the Workshare Compare for PowerPoint file type (WCFP), the Combine in Workshare file type (WWB) and, if it is not already added, the Microsoft Word file type (DOC) to the iManage server.

***Note:** This must be done for all iManage databases, regardless of whether the user has permissions to a database or not.*

To add file types to the iManage server:

1. From the **Start** menu on the iManage server, select **Programs** then **iManage Server** and then **Database Administration**. The *iManage Database Management* window is displayed.
2. Expand the tree on the left underneath the database to be integrated with Workshare and select **Type**. A list of file types recognized by iManage is displayed on the right side of the window.
3. From the **Manage** menu, select **Add**. The *Add Type* dialog is displayed.

4. Complete the fields as shown below and click **OK**.



5. Ensure that the Microsoft Word file type (DOC) appears in the list of recognized file types. If it does not, complete the above steps to add it.

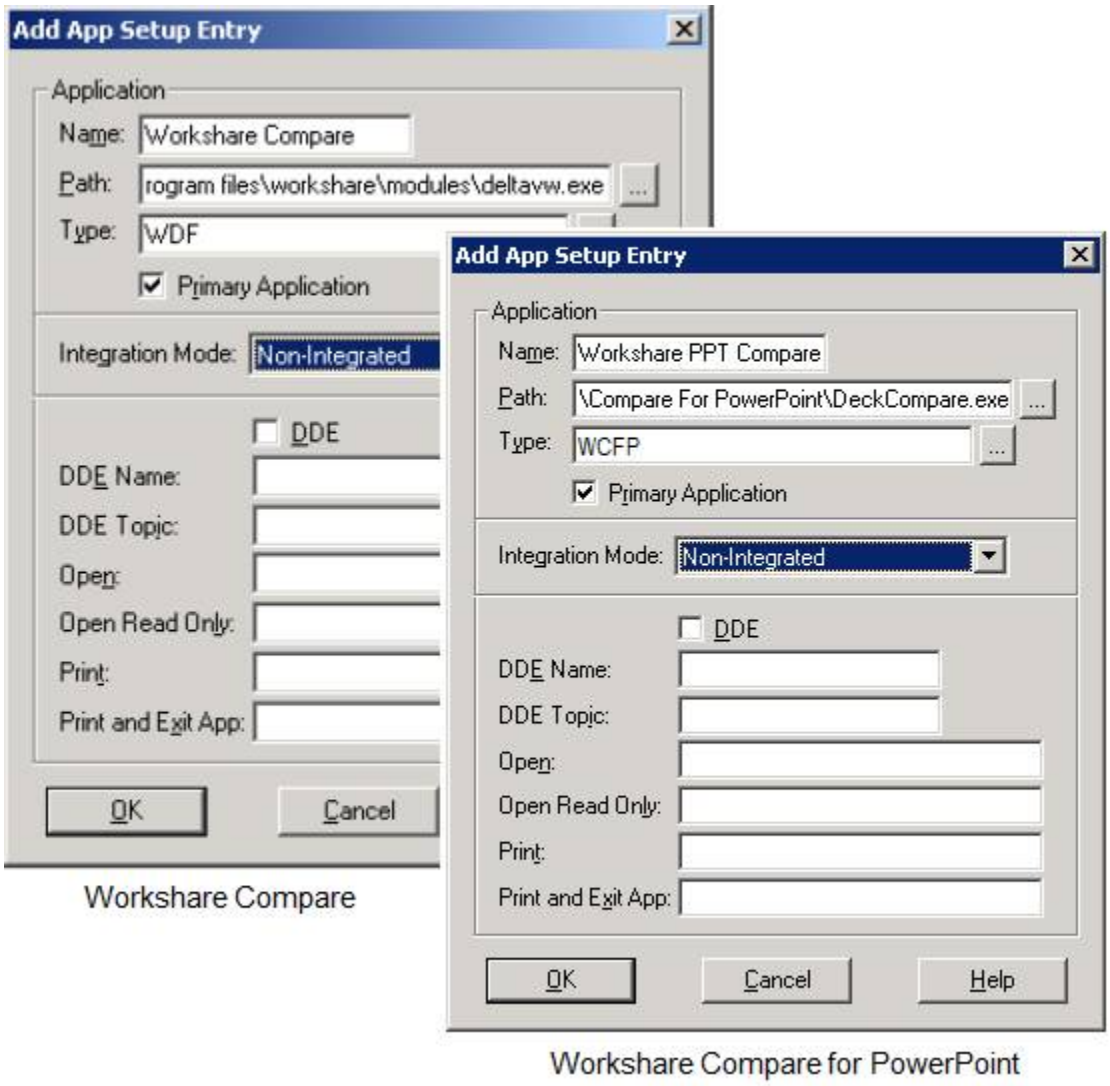
Adding the Workshare comparison applications to the iManage server

This step includes specifying the location of the Workshare comparison executable files as well as identifying the file types used by Workshare Compare and Workshare Compare for PowerPoint. This is done for each iManage database that will be used with the Workshare comparison applications.

To add the Workshare comparison applications to the iManage server:

1. In the *iManage Database Management* window, expand the tree on the left underneath the database to be integrated with Workshare and click **App Setup**. A list of applications set up to work with iManage is displayed on the right side of the window.
2. From the *Manage* menu, select **Add**. The *Add App Setup Entry* dialog is displayed.

3. Complete the fields as shown below:



> ***Note:*** *Ensure the path points to the location of the Workshare comparison executable files. By default, this is* ***C:\Program Files\Workshare\Modules\DeltaVw.exe*** *(Workshare Compare) and* ***C:\Program Files\Workshare\Compare For PowerPoint\DeckCompare.exe*** *(Workshare Compare for PowerPoint)*

4. Click **OK**.

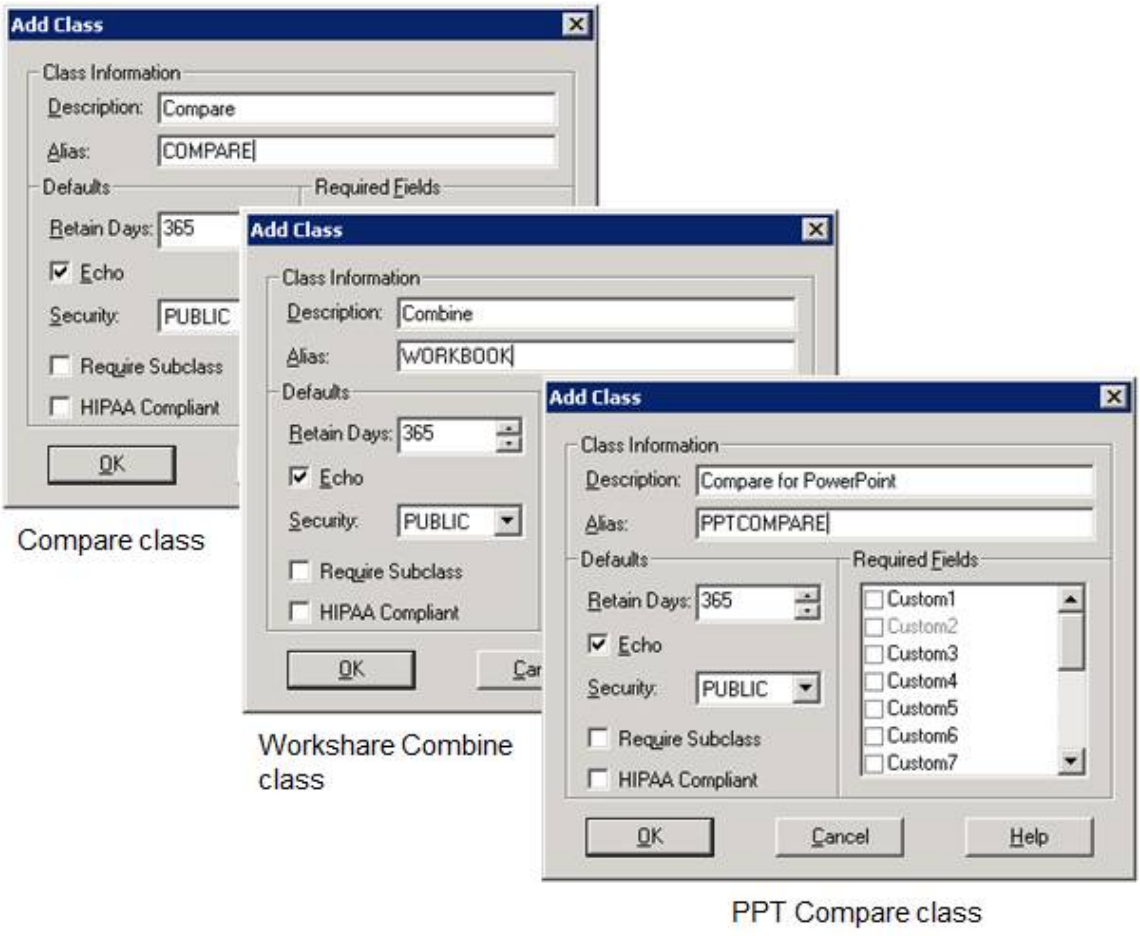
Adding Workshare as a class to iManage server

Adding Workshare files as a class (Compare class, PPT Compare class and Workshare Combine class) in the iManage server enables you to classify Workshare documents accordingly. This is done for each iManage database that will be used with Workshare.

If you do not want to add the suggested Workshare classes to your iManage server, you can specify your own class for the Workshare files. The class that you specify must exist on your server. Refer to the procedure, *To specify your own class*, page 56.

To add Workshare as a class:

1. In the *iManage Database Management* window, expand the tree on the left underneath the database to be integrated with Workshare and select **Class**. A list of file classes defined in iManage is displayed on the right side of the window.
2. From the *Manage* menu, select **Add**. The *Add Class* dialog is displayed.
3. Complete the fields as shown below and click **OK**.



To specify your own class:

Set the **Alternate Class Name** parameter in the Workshare Configuration Manager (**Integrations > iManage** category). You set this parameter to specify the class that you want to use and enable it by selecting the **Use Alternate Class Name** parameter. The class MUST exist on your iManage server.

Work 10 configuration

In a Work 10 environment, the integration steps required may vary according to your setup.

- **Work 10 server accessed through FileSite on desktop:**

  When accessing iManage files via FileSite, users will be able to right-click and Compare with Workshare.

- **Work 10 server accessed through browser**

  When accessing iManage files via a browser, in order to start a comparison from the context menu and compare with Workshare, the Workshare iManage Integration Server (WIIS) must be installed (described in the Installing WIIS knowledge article).

- **Work 10 server accessed from Office application**

  When the Work 10 for Office add-in is installed and users are accessing iManage files from an Office application, additional configuration can be performed as described below.

***Note**: In all scenarios, users can access Workshare Compare from the desktop shortcut icon and browse to iManage files to compare.*

The Work 10 integration into Office applications (Work 10 for Office add-in) provides an iManage ribbon within the Office environment. There is a Compare option on the ribbon, which defaults to the compare functionality provided by Microsoft Word. You can change this so that the Compare button accesses Workshare comparison functionality.

To direct the iManage Compare button to Workshare:

Workshare provides a plugin called **iManageOfficeAddin.zip** for iManage Work 10 for Office. It is located in the Modules subfolder in the Workshare installation folder. By default, this is C:\Program Files\Workshare\Modules or C:\Program Files(x86)\Workshare\Modules.

You must upload this plugin to your iManage Work 10 server, which will then push it out to your Work 10 client machines. The plugin is uploaded from iManage Control Center. Refer to iManage documentation at *help.imanage.com* for more details on uploading plugins for iManage Work 10 for Office to the iManage Work server.

iManage integration – configuring client integration

There are several configuration procedures you may want to perform on an iManage client when integrating with Workshare, as follows:

- Launching applications within iManage
- Creating Workshare comparison icons on the iManage desktop

Launching applications within iManage

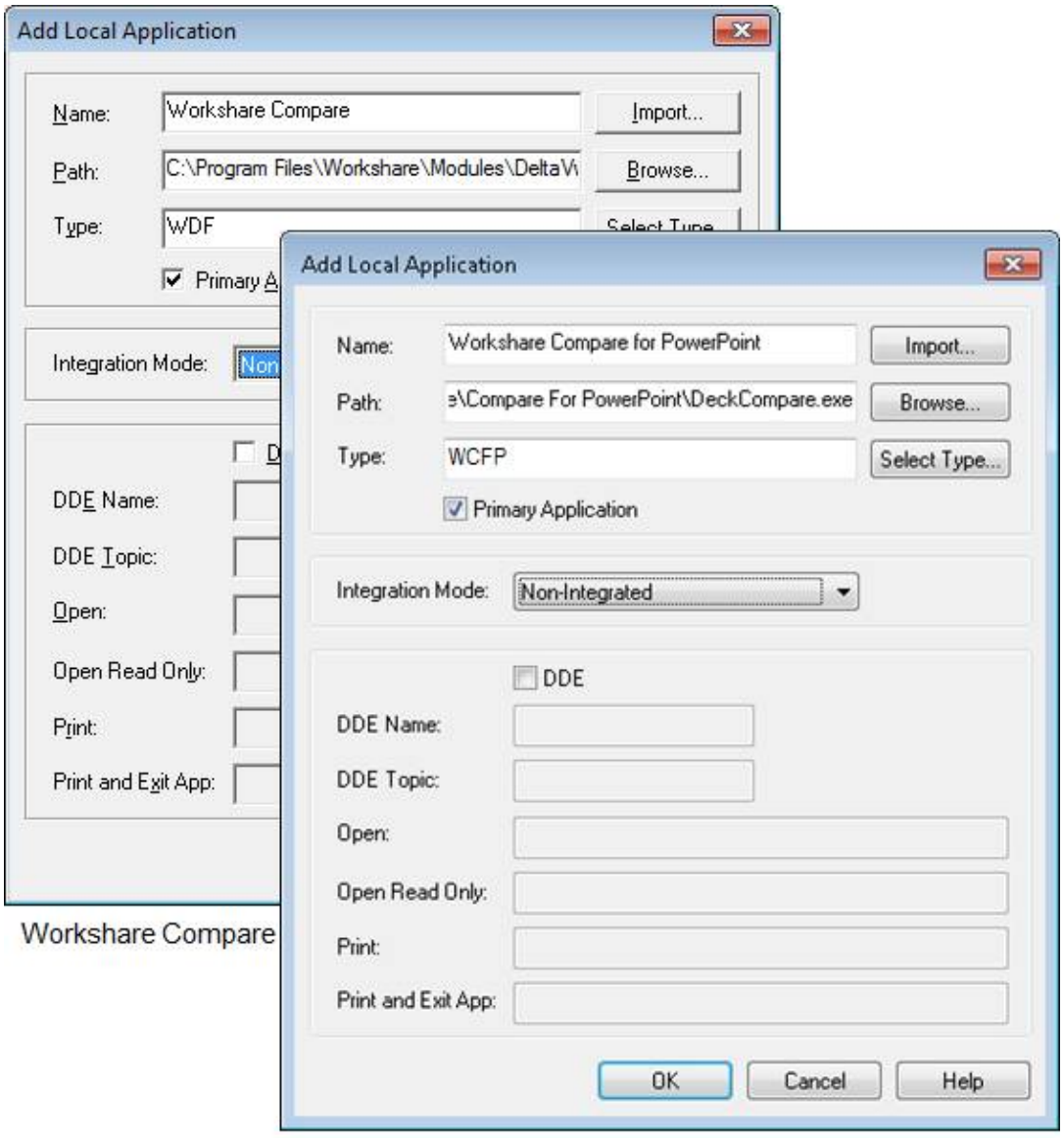
This procedure is only relevant when the iManage server application location is different from your local application locations. iManage would first use the local location of Workshare Compare/Compare for PowerPoint before using the server location.

To launch Workshare Compare, Workshare Compare for PowerPoint, Microsoft Word and Rich Text Format files from iManage you have to add application information to Local Applications settings.

To add application information to Local Applications settings:

1. In the *WorkSite* ribbon in Outlook, select **Options > Local Applications**. The *Application Setup Information* dialog is displayed.
2. Click the **Add** button. The *Add Local Application* dialog is displayed.

3. Complete the fields as shown below:



Workshare Compare

Workshare Compare for PowerPoint

4. Click **OK** to save the changes.

Creating Workshare comparison icons on the iManage desktop

In order to launch Workshare Compare/Compare for PowerPoint/Compare for Excel via an icon within your iManage desktop, follow the procedure below.

To create Workshare comparison icons:

1. Open iManage DeskSite.
2. Right-click the toolbar and select **Customize**. The *Customize* dialog is displayed.
3. Select the **Commands** tab.
4. Click and drag the **Workshare Compare** icon, the **Workshare Compare for PowerPoint** icon and the **Workshare Compare for Excel** icon to the DeskSite toolbar.

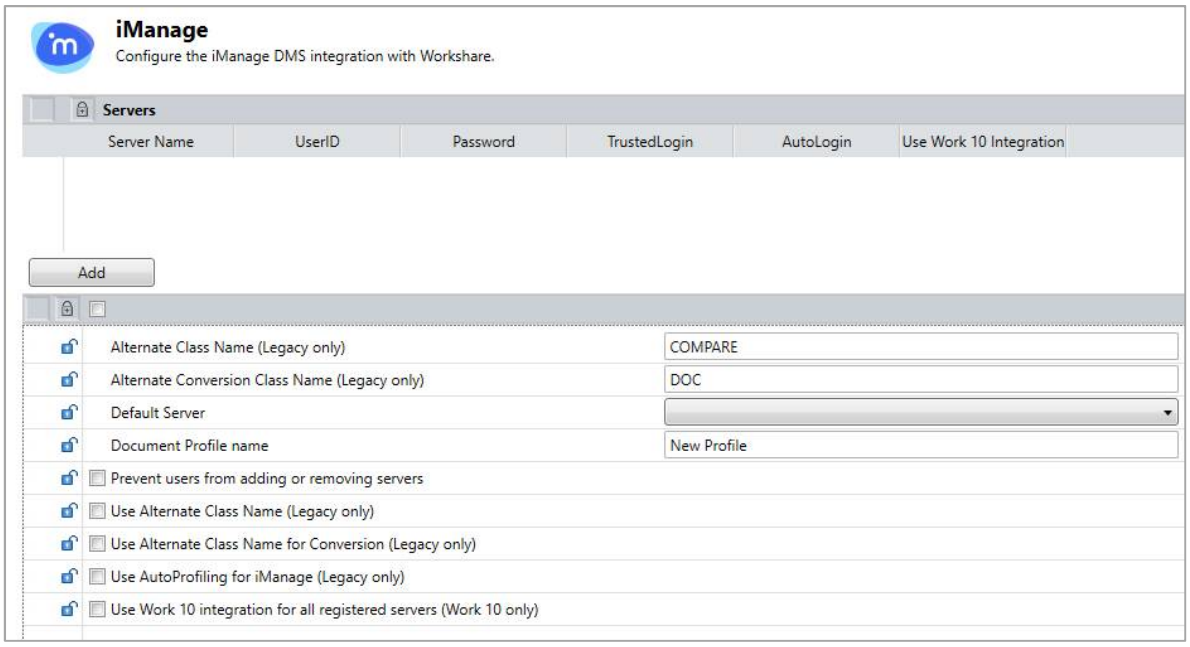
iManage integration - configuring Workshare

On installation, Workshare automatically copies the iManage server settings specified for the iManage client. Workshare again retrieves the iManage server settings at the beginning of each DMS session to keep the list of servers up to date.

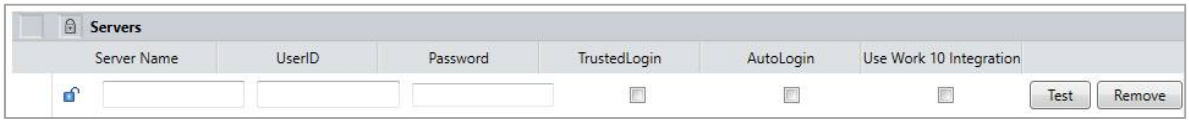
If you do not use iManage trusted login (so that each user has a unique user name and password to access the iManage server), you must specify your iManage user name and password in the Workshare Configuration Manager.

To specify/modify iManage server settings:

1. In Administrator Mode of the Workshare Configuration Manager, select the **Integrations > iManage** category.



2. To add details of a new server, click **Add**. An entry is added to the list of iManage servers in the **Servers** section.



3. In the **Server Name** field, enter the name of your iManage server.
4. 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.
5. 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.*

6. 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.*

7. Click **Test** to confirm connection to the specified server.
8. Add further servers as required.

To delete a server from the list, click **Remove** to the right of the server details. To modify details of an existing server, edit the details in the **Servers** list.

OpenText integration

In order to use Workshare with an OpenText DMS, you must add the necessary Workshare file types and identify Workshare Compare and Workshare Compare for PowerPoint as applications in the DMS server so that the DMS can recognize and work with Workshare files. Additionally, the Workshare Compare, Workshare Compare for PowerPoint and the Microsoft Word applications must be made ‘compatible’ with the OpenText DMS.

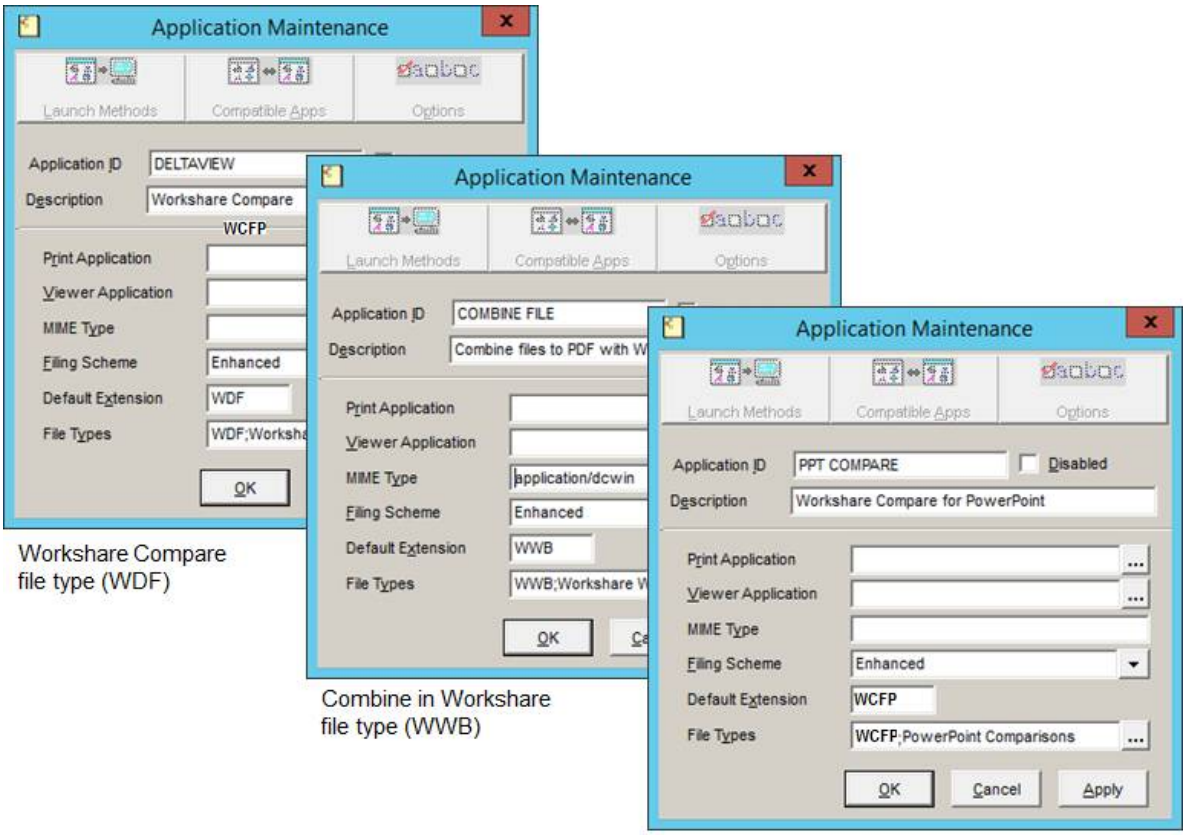
> ***Note:*** *The OpenText server integration procedures only need to be performed once per OpenText server. The procedures can be performed from the server or client machine.*

Adding application and file types to the server

This step includes adding the required file types used by Workshare - the Workshare Compare WDF file type, the Workshare Compare for PowerPoint WCFP file type and the Combine in Workshare WWB file type as well as specifying the location of the Workshare comparison executable files. The procedure described below is performed from a DM5 client machine.

To add application and file types to the server:

1. Open Library Maintenance.
2. Click **Applications** and then click **New**. The *Application Maintenance* dialog is displayed.
3. Complete the fields as shown below:



Workshare Compare file type (WDF)

Combine in Workshare file type (WWB)

Workshare Compare for PowerPoint file type (WCFP)

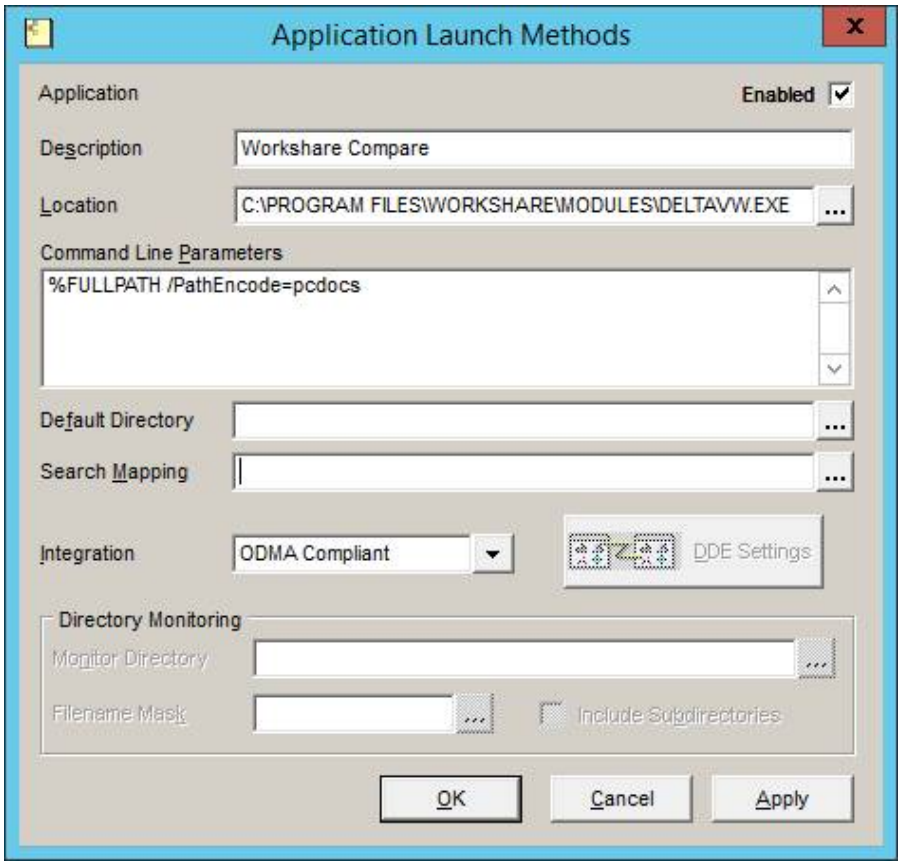
***Note:** For PDF Combine, enter **application/dcwin** as the **MIME Type**.*

Note: *To add the file type, click the browse button and click* ***Add*** *in the dialog displayed. Enter* ***WDF****,* ***WCFP*** *or* ***WWB*** *in the* ***Extension*** *field and* ***Workshare Deltafile****,* ***PowerPoint Comparisons*** *or* ***Workshare Combine*** *in the* ***Description*** *field and click* ***OK*** *and then* ***OK*** *again.*

4. Click **OK**. The specified application now appears in the list of applications.
5. Double-click the new **DeltaView** entry to display the *Application Maintenance* dialog again.
6. Click the **Launch Methods** button.
7. Click the **New** button. The *Application Launch Methods* dialog is displayed.
8. In the **Location** field, enter the location of the Workshare Compare executable file. By default, this is **C:\Program Files\Workshare\Modules\DeltaVw.exe**.
9. In the **Command Line Parameters** field, %FULLPATH /PathEncode=pcdocs.

Note: *Do not forget to enter a space between FULLPATH and the forward slash.*

10. From the **Integration** dropdown list, select **ODMA Compliant**.
11. Ensure the **Enabled** checkbox (top right) is selected.



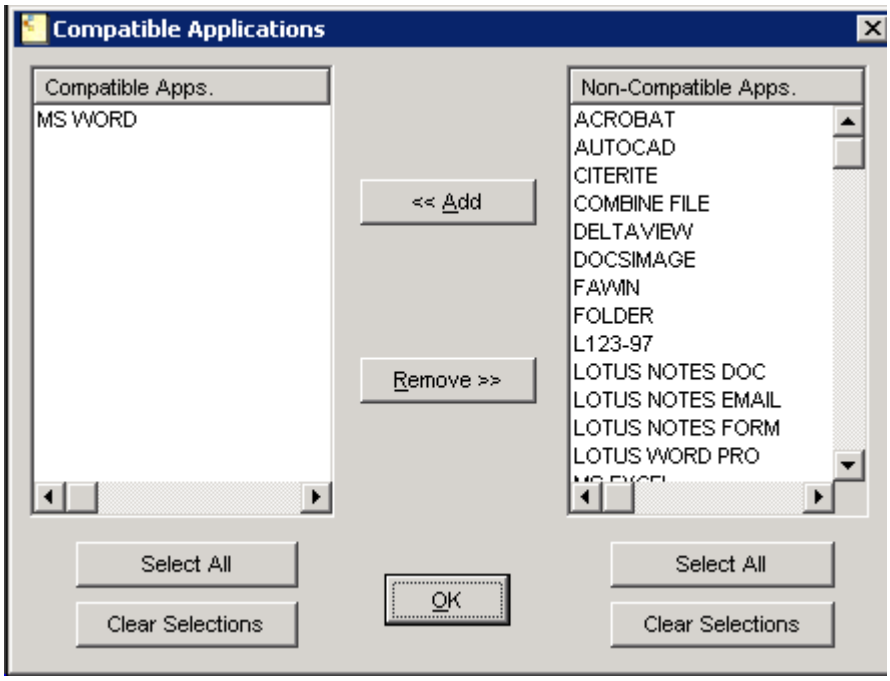
12. Click **OK**, then **Close** and then **OK**.
13. Repeat steps 5-12 for the **PPT Compare** application and the **Combine File** entry.

Making Workshare compatible with OpenText eDOCS DM

In order for files created in Workshare to be retrieved from OpenText eDOCS DM, Microsoft Word and Workshare Compare must be made "compatible applications" with the OpenText eDOCS DM.

To make Microsoft Word a compatible application:

1. In the *Library Maintenance* window, double-click **DeltaView**.
2. Click **Compatible Apps**. The *Compatible Applications* dialog is displayed.
3. From the **Non-Compatible Apps.** list, select **MS Word** and click **Add**. Microsoft Word is added to the **Compatible Apps.** list.



4. Click **OK**, and then **OK** again.

To make Workshare Compare a compatible application:

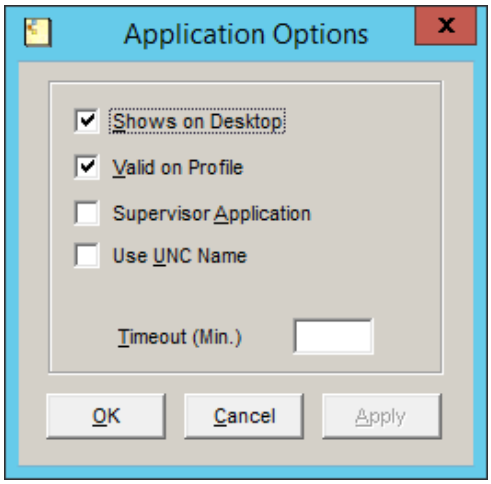
1. In the *Library Maintenance* window, double-click **MS Word**.
2. Click **Compatible Apps**. The *Compatible Applications* dialog is displayed.
3. From the **Non-Compatible Apps.** list, select **DeltaView** and click **Add**. Workshare Compare is added to the **Compatible Apps.** list.
4. Click **OK**, and then **OK** again.

Making the Workshare comparison icons appear on the desktop and within a user profile

This section describes how to place the Workshare Compare, the Workshare Compare for PowerPoint and the Workshare Compare for Excel icons on the OpenText eDOCS DM desktop as well as within a user profile.

To add the Workshare comparison icons:

1. In the *Library Maintenance* window, double-click **DeltaView**.
2. Click **Options**. The *Application Options* dialog is displayed.



3. Select the **Shows on Desktop** and **Valid on Profile** checkboxes.
4. Click **OK**.
5. Repeat steps 1-4 for **Compare for PowerPoint** and **Compare for Excel**.
6. Click **Close**.

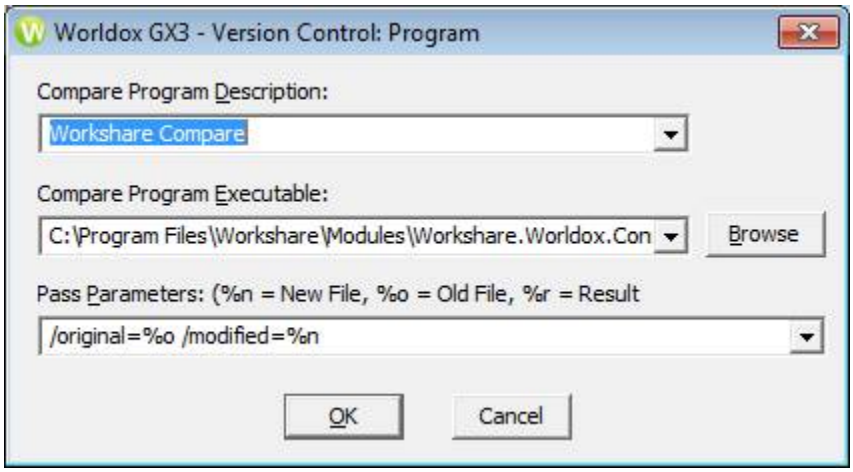
Worldox integration – configuring compare files

After installing Workshare, you can configure the Worldox Compare Files option (available in the Worldox toolbar and the right-click menu) so that it works with Workshare.

To configure Compare Files in Worldox:

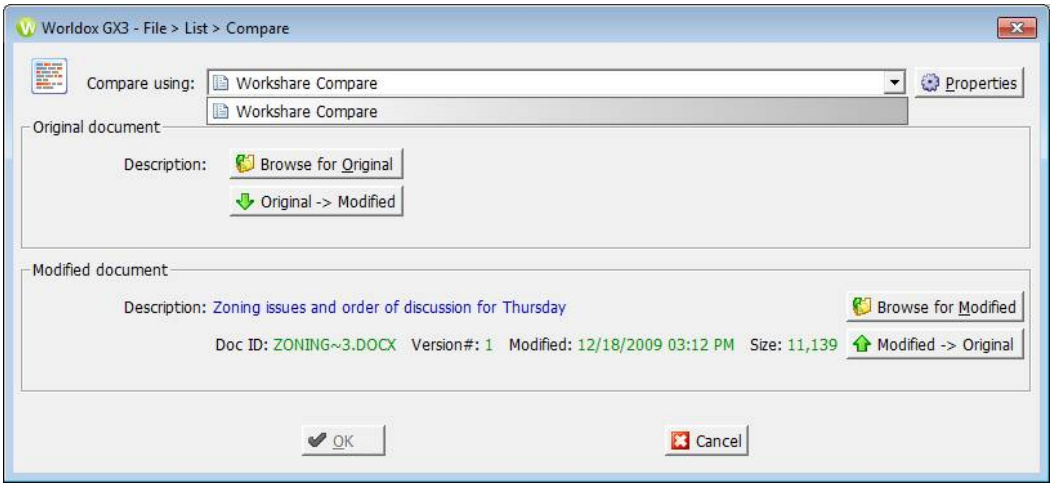
1. In Worldox, click **Compare Files** (in the toolbar or via the right-click menu).
2. Click **Properties** to the right of the **Compare using** field.

3. Click **Add**.



4. In the **Compare Program Description** field, enter a description such as “Workshare Compare”.
5. Click **Browse** and browse to the Modules folder in the Workshare installation folder.
6. Select Workshare.Worldox.Connector.exe and click **OK**.
7. In the **Pass Parameters** field, enter /original=%o /modified=%n.
8. Click **OK**.
9. Click **Close**.

Now you can run a comparison using Workshare Compare.



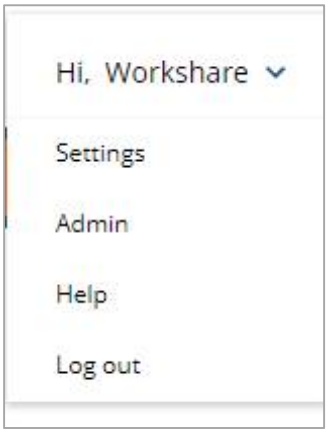
Once you have completed this configuration, right-clicking a file in Worldox or selecting a file and clicking **Compare Files**, will display the above dialog with Workshare Compare selected as the application to use for the comparison.

NetDocuments integration

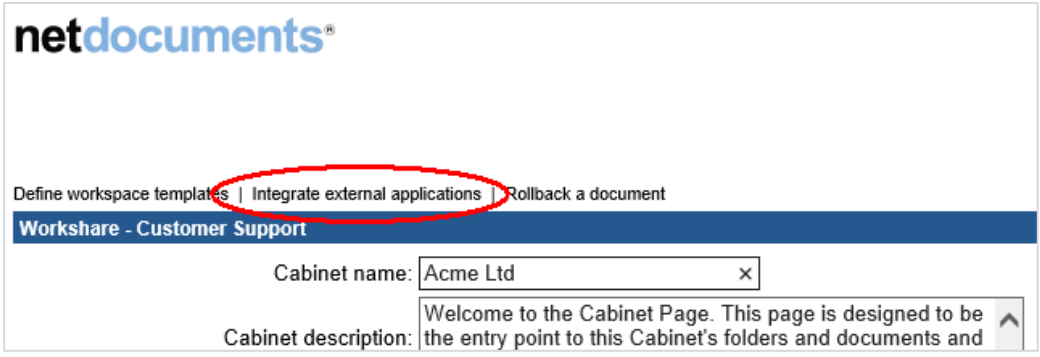
In order to maximize the integration of Workshare in NetDocuments, you should add Workshare as an application to your NetDocuments cabinets. Workshare will then be available when using the NetDocuments **Send to application** functionality.

To add Workshare as an application:

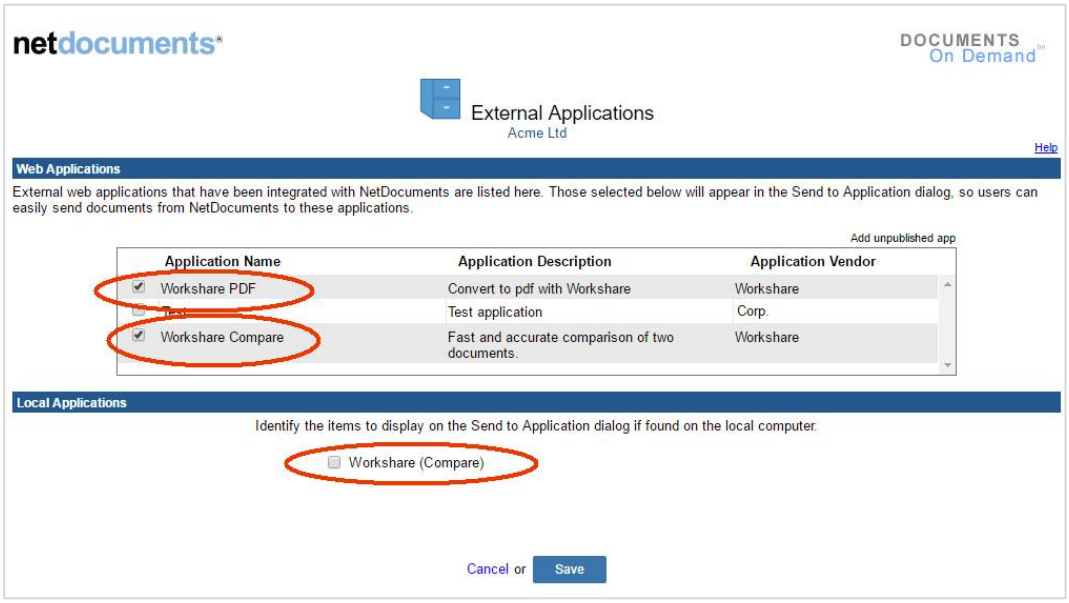
1. Click your user name and select **Admin** in the top right of the NetDocuments window.



2. From the **Cabinets** list, click the cabinet you want to add Workshare to.
3. Click **Integrate external applications** at the top of the page.



4. A list of available published applications is displayed and you can select the app you want to be available in the *Send to Application* dialog.

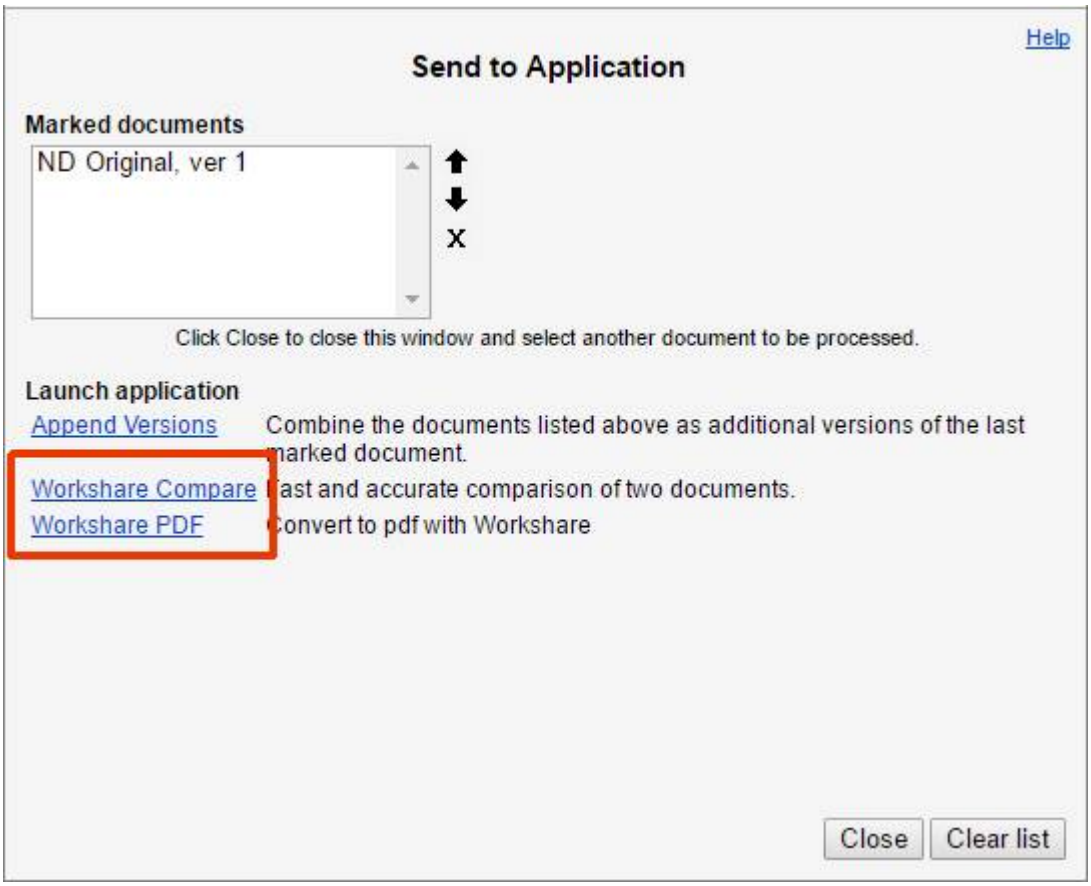


5. Make sure **Workshare Compare** and **Workshare PDF** are selected in the **Web Applications** section and that **Workshare (Compare)** is deselected in the **Local Applications** section.

> ***Note**: Deselecting **Workshare (Compare)** is the **Local Applications** section ensures there is not an additional unnecessary "Workshare" entry in the Send to Application dialog.*

6. Scroll down and click **Save**.
7. Scroll to the bottom of the cabinet page and click **Submit**.

Now when a user selects the **Send to application** option in NetDocuments, **Workshare Compare** and **Workshare PDF** are listed as available applications.



SharePoint integration - server installation

In order to use Workshare with SharePoint, the Workshare Extension for SharePoint must be installed on Microsoft Windows Server 2008 (or later) running Microsoft Windows SharePoint Services 3.0 (or later).

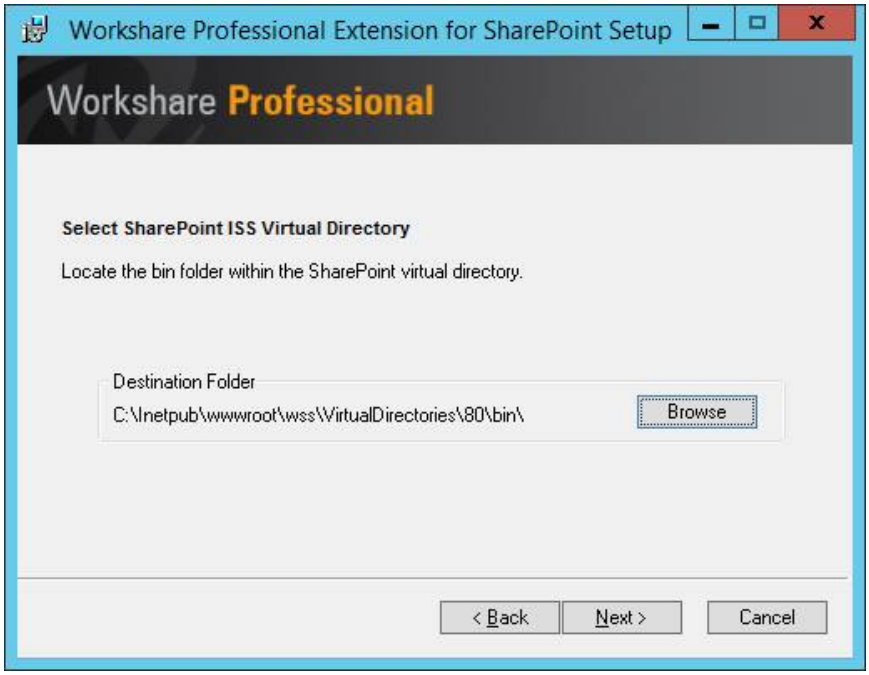
Before beginning the installation procedure, make sure that all other programs are closed and disable any anti-virus software.

To install Workshare Extension for SharePoint:

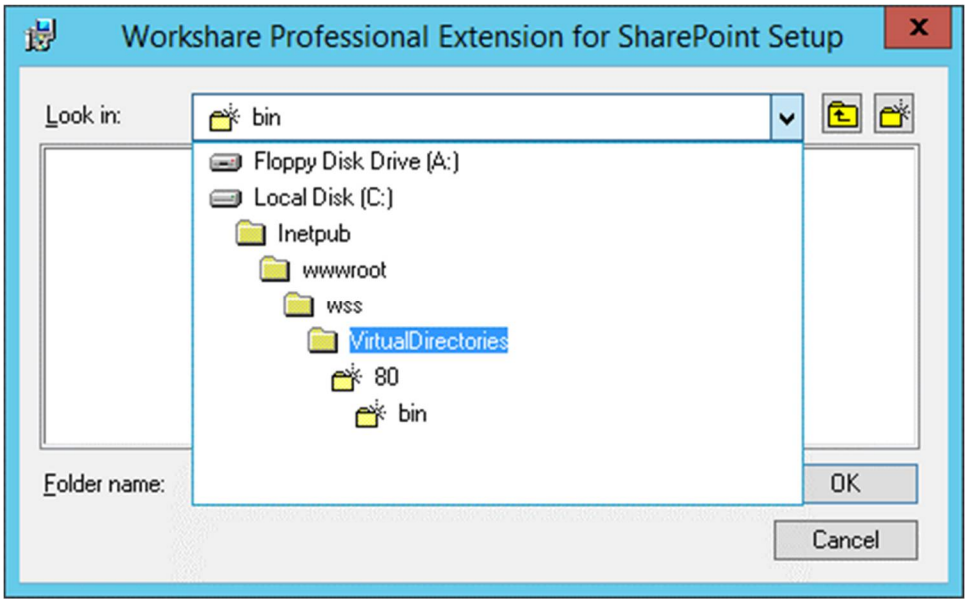
1. Locate the installation package Workshare.Connect.SharePoint.WebService .x64/x86.msi and double-click to start the installation wizard. The installation welcome screen is displayed.



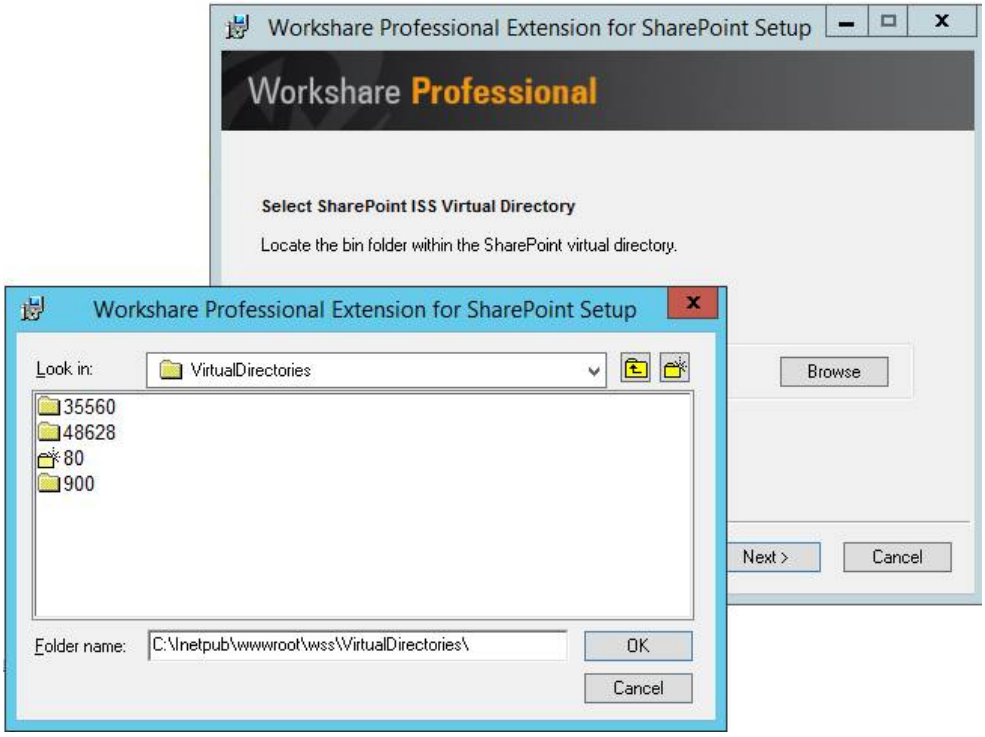
2. Click **Next**.



3. Click **Browse** and locate your SharePoint ISS Virtual Directory.

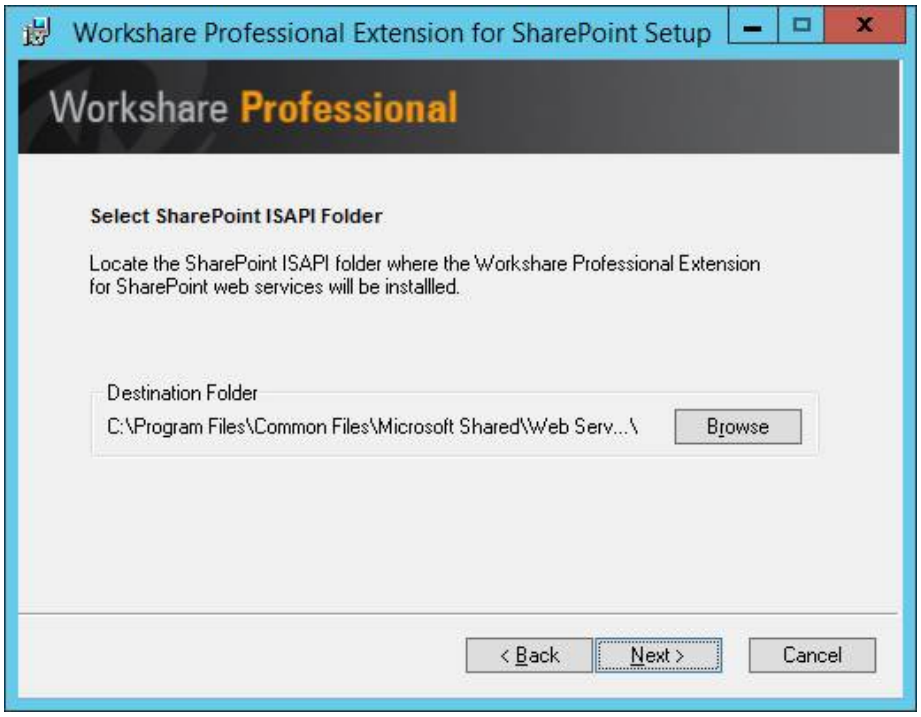


4. Select the SharePoint virtual directory where Workshare Professional Extension for SharePoint will be installed.



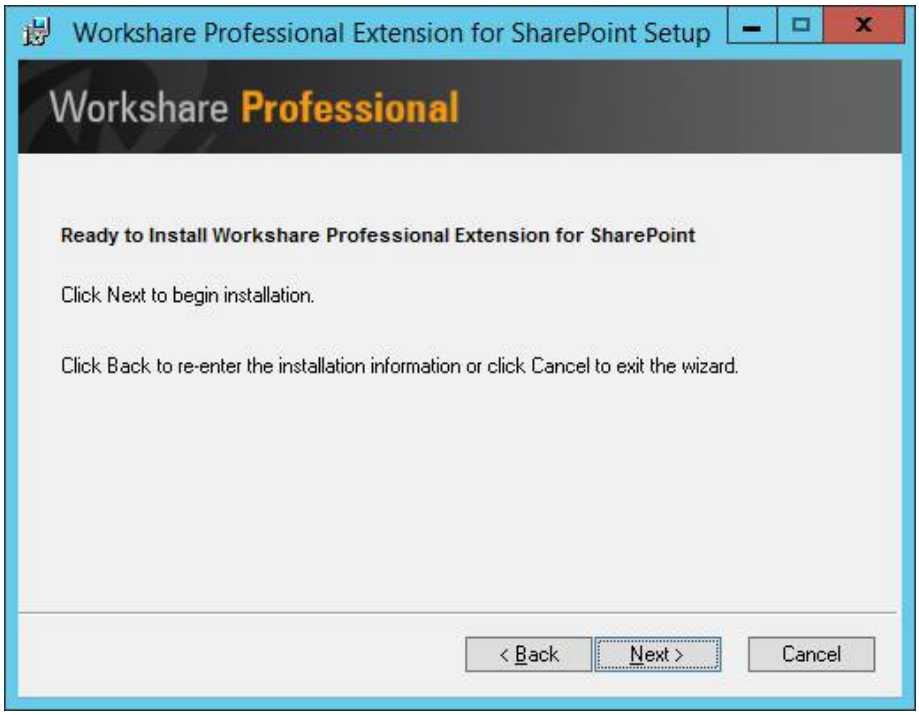
5. Locate the **bin** folder in your selected virtual directory and click **OK**.

6. Click **Next**.



7. Select the SharePoint ISAPI directory where the Workshare Extension for SharePoint web services will be installed. By default, this is located at: C:\Program Files\Common Files\Microsoft Shared\web server extensions\15\ISAPI\.

8. Click **Next**.



9. Click **Next** to begin installation or click **Back** button to change any installation settings.
10. Once the installation has completed, click **Finish**.

> ***Note**: The installation will restart your IIS.*

SharePoint integration - client configuration

The SharePoint Integration for Workshare is provided as part of the Workshare installation package and requires a small amount of configuration on the client to specify SharePoint sites and servers that will be accessed from Workshare.

SharePoint site configuration

When comparing documents, users can select documents from a SharePoint site. The sites available for selection have to be configured in the Workshare Configuration Manager.

To configure SharePoint sites:

1. In Administrator Mode of the Workshare Configuration Manager, select the **Integrations > Microsoft SharePoint** category.
2. Click **Add**. An entry is added to the list of SharePoint sites in the **Servers** section.



3. In the text box, enter the complete URL for the SharePoint site location.
4. 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.
5. 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. To modify details of an existing site, edit the details in the **Servers** list.

Email Systems Integration

Workshare uses the mail server address book to determine if recipients are internal or external, and applies particular settings as a result. Therefore, if you want to use Workshare to protect your documents while working offline, you need to ensure your machine is set up to enable recipients to be resolved correctly.

If a copy of your mail server address book is not available locally, all recipients are treated as external. The following sections describe how to create a local copy of your mail server address book in different email clients.

Setting up Microsoft Outlook

For Workshare to work correctly with Microsoft Outlook in offline mode, you simply need to enable offline mode (as specified in the Microsoft Outlook documentation), and ensure that you download the server address book.

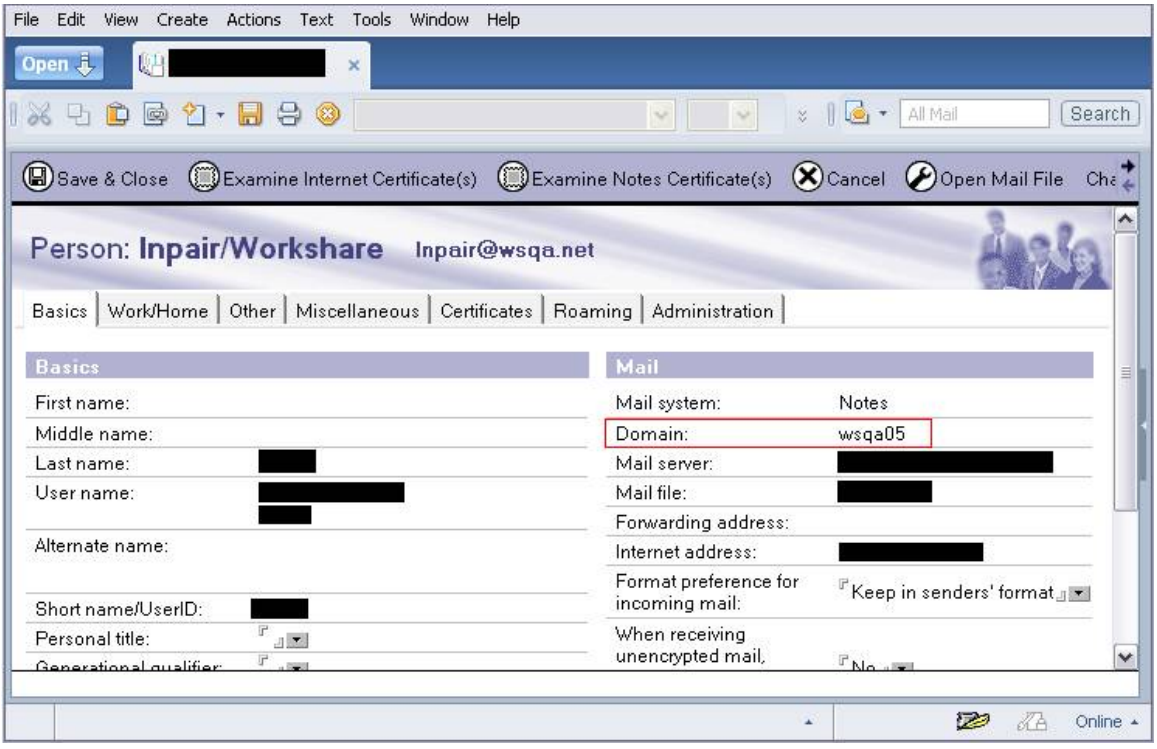
To download the server address book:

1. From the *Tools* menu, select **Send/Receive** and then **Download Address Book**.
2. Select to download the address book.
3. Select to download full details.
4. Ensure the correct server address book is selected.

Setting Up IBM Notes

Resolving Email Addresses as Internal - Creating the Internal Domain List

Workshare categorizes the routing of email messages as either Internal or External to determine which policies to apply. Internal addresses are identified based on the recipient's domain. For Workshare to recognize the domain as internal, the internal domain list need to be populated with the value of the recipient's domain as it appears on the person's detail page in the Domino directory.



To set the internal domains:

The Internal Domain List can be set in the Workshare Configuration Manager (**Protection > Administration** category). If more than one domain is required then the values should be separated with a semicolon (;), for example, "Domain 1;Domain 2". The value is not case sensitive.

Offline Mode

For Workshare to work correctly with Notes in offline mode, you need to set up the client to work offline (as specified in the Notes documentation), and set up the Mobile Directory Catalog on the Domino server. You must then replicate the Mobile Directory Catalog on the Notes client.

Setting Up the Mobile Directory Catalog on the Domino Server

This step involves creating the database (Mobile Directory Catalog), configuring the database and then loading the database.

To create the Mobile Directory Catalog:

1. From the *File* menu, select **Database** and then **New**.
2. Next to **Server**, select the Dircat server you picked to aggregate the directory catalog.
3. Next to **Title**, enter a title for the directory catalog (**Mobile Directory Catalog**).
4. Next to **Filename**, enter a file name for the catalog ('**MobileDC.nsf**').
5. Select **Create full text index for searching**.
6. Change **'Template Server…'** to **Domino server**.
7. Select **Show advanced templates**.
8. Below **Template server**, select a server that stores the Directory Catalog template, and then click **OK**.
9. Select the **Directory Catalog (DIRCAT5.NTF)** template.
10. Click **OK**.

To configure the Mobile Directory Catalog:

1. In the database you created (Mobile Directory Catalog), select **Create** and then **Configuration**.
2. Complete the following fields in the Directory Catalog Configuration document:
   - Change **Directories to include** to include the Domino Directories the Dircat task aggregates (Names.nsf).
   - Change **Additional fields to include** to include MailSystem.
3. Click **Save** and **Close**.

To load the Mobile Directory Catalog:

- From the Domino Server Administrator run the command **Load Dircat database** to build the condensed Directory Catalog (**Load DirCat MobileDC.nsf**).

Replicating the Mobile Directory Catalog on the Notes Client

This step involves replicating the Mobile Directory Catalog on the Notes client and setting up the client to use the Mobile Directory Catalog for name resolution.

To replicate the Mobile Directory Catalog:

1. From the *File* menu, select **Database** and then **Open**.
2. In the *Open Database* dialog, change the **Server** to the Domino server and the **Database** to Mobile Directory Catalog and click **Open**.
3. While the Mobile Directory Catalog database is open, from the *File* menu, select **Replication** and then **New Replica**.
4. Verify that the server is **Local** and the file name and title is for the Mobile Directory Catalog (**MobileDC.nsf**) and click **OK**.

To set up the client to use the Mobile Directory Catalog for name resolution:

1. From the *File* menu, select **Preferences** and then **User Preferences**.
2. Select **Mail and News**.
3. Modify the **Local Address Books** and add the Mobile Directory Catalog to the existing list (**names.nsf, MobileDC.nsf**).
4. Click **OK**.

Note: *This step can only be completed if the Mobile Directory Catalog exists. See* Setting Up the Mobile Directory Catalog on the Domino Server*, page 75.*

Issues with Custom Forms (Recipient Fields)

If you work with custom forms and you modify recipients, you should be aware of which address fields Workshare uses to resolve recipients as internal or external.

In order to determine the internal/external classification of a destination, only the following fields relating to recipients are extracted from the form by the EM_MAILSENDNOTE event:

- **EnterSendTo**
- **EnterCopyTo**
- **EnterBlindCopyTo**

If you use custom forms, you should note that the fields **Recipients**, **SendTo**, **CopyTo** and **BlindCopyTo** are not resolved.

Chapter 6: Network Deployment

This chapter describes how to install and license Workshare across your network. It includes the following sections:

- **Overview**, page 78, introduces the options available for installing Workshare across a network.
- **Deploying via the Command Line**, page 80, describes the steps required to use the command line to install and license Workshare across your network.
- **Citrix Installation Guidelines**, page 95, describes how to install Workshare on Citrix.
- **Active Directory Deployment Guidelines**, page 96, describes how to deploy Workshare using Active Directory.

Overview

Deploying Workshare across your network means installing your Workshare products on all workstations in your network. Workshare can be deployed across your network using the Workshare command line installation or third party deployment products.

If you want to deploy specific configuration settings with Workshare, you must use a REG file or an ADM template. Refer to *Chapter 3: Configuration.* It is recommended to deploy the configuration settings prior to the Workshare installation.

If you are licensing using the user authenticated method, there is no need to include a license file in the deployment. Users are prompted to log in to Workshare in order to retrieve their license entitlements. They will be prompted in either of the following ways:

- When file share & sync is included in the installation, the Workshare desktop app is launched after install and users are prompted to log in;

  or

- The first time users' access Workshare functionality, they are prompted to log in to Workshare if they have not already done so.

If you are licensing using the enterprise method, you will need to obtain a Registry file from Workshare Customer Support and you must deploy this to license your users. This Registry file can be included in your deployment script.

The executables download prerequisites from the Internet if they are required. For enterprise deployments, the prerequisites can be extracted from the executables using the `/layout` command. Refer to *Windows installer packages*.

Installation file summary

The installation requires the following prerequisites:

- Microsoft .NET Framework 4.6.2
- Microsoft Visual C++ 2017 Redistributable Package (x86)
- Microsoft Visual C++ 2017 Redistributable Package (x64)
- Microsoft Visual Studio 2010 Tools for Office Runtime Setup

***Note**: Microsoft Visual C++ 2015 Redistributable Package (x86/x64) is also acceptable since 2017 and 2015 are binary compatible runtimes: https://docs.microsoft.com/en-us/cpp/porting/binary-compat-2015-2017?view=vs-2017*

The extracted files include the following Workshare MSI packages:

Executable	Contents Extracted
Workshare.Professional.Bundle.exe	Workshare.Professional.msi WorkshareCompareForPowerPoint.msi Workshare.ExcelCompare.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Compare.Bundle.exe	WorkshareCompare.msi WorkshareCompareForPowerPoint.msi Workshare.ExcelCompare.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Protect.Bundle.exe	WorkshareProtect.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Professional.Bundle.X64.exe	Workshare.Professional.X64.msi WorkshareCompareForPowerPoint.X64.msi Workshare.ExcelCompare.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)
Workshare.Compare.Bundle.X64.exe	WorkshareCompare.X64.msi WorkshareCompareForPowerPoint.X64.msi Workshare.ExcelCompare.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)

Executable	Contents Extracted
Workshare.Protect.Bundle.X64.exe	WorkshareProtect.X64.msi Workshare.Desktop.msi **Redist** folder including the prerequisite executables (NDP462-KB3151800-x86-x64-AllOS-ENU.exe, vc_redist.x64.exe, vc_redist.x86.exe, vstor_redist.exe)

All Workshare products are installed on a per machine basis.

Deploying via the Command Line

You can use the executable file or the MSI files found within the executable file to install Workshare from the command line.

Configuring modules during installation

In a Workshare Professional installation, the Compare (file comparison), Protect (file & metadata security) and Connect (file share & sync) modules are installed by default and additionally, Microsoft Office integration is installed by default. During the command line install, you can customize the module selection by setting Registry values.

In a Workshare Compare installation, the Compare module is hard-coded into the installation and Microsoft Office integration is installed by default. During the command line install, you can customize the Connect, Office and DMS integration selection by setting Registry values. You cannot customize the Compare module.

In a Workshare Protect installation, the Protect module is hard-coded into the installation and the Connect, Office and DMS integrations are installed by default. During the command line install, you can customize the Connect and Office integration selection by setting Registry values. You cannot customize the Protect module selection.

Registry

The Registry location HKEY_LOCAL_MACHINE\SOFTWARE\Workshare\Install contains DWORD values which can define the module state.

Module	Registry Value	DWORD Value	Available in
iManage	ProfInterwovenModule	1	Professional, Compare & Protect

Module	Registry Value	DWORD Value	Available in
Compare	ProfCompareModule	1	Professional
Connect	ProfConnectModule	1	Professional, Compare & Protect
Secure File Transfer	ProfSecureFileTransferModule	1	Professional & Protect
Microsoft Excel Integration	OfficeExcelIntegration	1	Professional, Compare & Protect
Microsoft Outlook Integration	OfficeOutlookIntegration	1	Professional, Compare & Protect
Microsoft PowerPoint Integration	OfficePowerPointIntegration	1	Professional, Compare & Protect
Microsoft Word Integration	OfficeWordIntegration	1	Professional, Compare & Protect
NetDocuments	ProfNetDocumentsModule	1	Professional, Compare & Protect
OpenText	ProfHummingbirdModule	1	Professional, Compare & Protect
Protect	ProfProtectModule	1	Professional
SharePoint	ProfSharepointModule	1	Professional, Compare & Protect
Worldox	ProfWorldoxModule	1	Professional, Compare & Protect

For instance, the following example Workshare Professional Registry script would enable Compare and Protect and Connect and NetDocuments and disable SharePoint, OpenText, iManage and Worldox:

```
Windows Registry Editor Version 5.00


[HKEY_LOCAL_MACHINE\SOFTWARE\Workshare\Install]
"ProfCompareModule"=dword:00000001
"ProfProtectModule"=dword:00000001
"ProfConnectModule"=dword:00000001
"ProfSecureFileTransferModule"=dword:00000001
"ProfHummingbirdModule"=dword:00000000
```

```
"ProfInterwovenModule"=dword:00000000
"ProfSharepointModule"=dword:00000000
"ProfNetDocumentsModule"=dword:00000001
"ProfWorldoxModule"=dword:00000000
```

Information in a Registry script can be imported into the Registry using regedit.exe. Assuming that the above Registry script is in WorkshareModuleState.reg, you could import it into the Registry silently by:

```
Regedit /s <path to shared directory>\WorkshareModuleState.reg
```

DisableFeatures.ini

The DisabledFeatures.ini file is no longer supported for installations of Workshare.

In previous versions of Workshare, the module state could be controlled with an INI file called **DisabledFeatures.ini** in the installation directory. This INI file has no effect on the installation.

Installation procedure with the install wizard

The Workshare install contains the Workshare install wizard and Workshare installs. The Workshare install wizard examines the client desktop, downloads any prerequisites not present, installs the prerequisites and installs and configures the Workshare installs.

Deploying Workshare with the executable

As an example, the following procedure describes how to install Workshare Professional using the **Workshare.Professional.Bundle.exe** executable.

To install Workshare using the executable:

1. Create a shared directory with relevant permissions so that client machines can access the Workshare executable during the installation.
2. Copy the executable to the shared directory.
3. The default module state is to install the Compare, Protect and Connect modules. You can change the installed module state by running a Registry script on the client to set the required module install state before installing the executable.
4. Run the executable on the client desktop. This will extract the files to the client and run the install wizard on the client machine. Parameters passed to the executable are passed on to the install wizard. The command line is:

   ```
   <path to Workshare.Professional.Bundle.exe > [/silent]
   ```

Installation procedure using the MSI files directly

To install Workshare using the MSI files you must extract the contents of the Workshare executable using the `/layout` command and ensure that all prerequisites are installed on the client desktop.

For MSIs you must specify msiexec.exe /i [InstallerPath] [InstallerArgs].

To deploy Workshare using MSIs:

1. Create a shared directory with relevant permissions so that client machines can access the Workshare installation files during the installation.
2. Run `Workshare.Professional.Bundle.exe /layout` and this will extract and download the prerequisites and MSIs to a folder called Redist to the directory created in step 1.
3. The default module state is to install the Compare, Protect and Connect modules. You can change the installed module state by running a Registry script on the client to set the requested module install state before running the MSI. Alternatively, you can specify modules to install to the Professional MSI in step 5.
4. Install prerequisites (downloaded in Step 2).
5. Install the product (Workshare.Professional.msi, WorkshareCompare.msi, WorkshareProtect.msi).
6. Install the Compare for PowerPoint msi (WorkshareCompareForPowerPoint.msi).
7. Install the Compare for Excel msi (Workshare.ExcelCompare.msi).
8. (Optional) Install the desktop msi (Workshare.Desktop.msi).

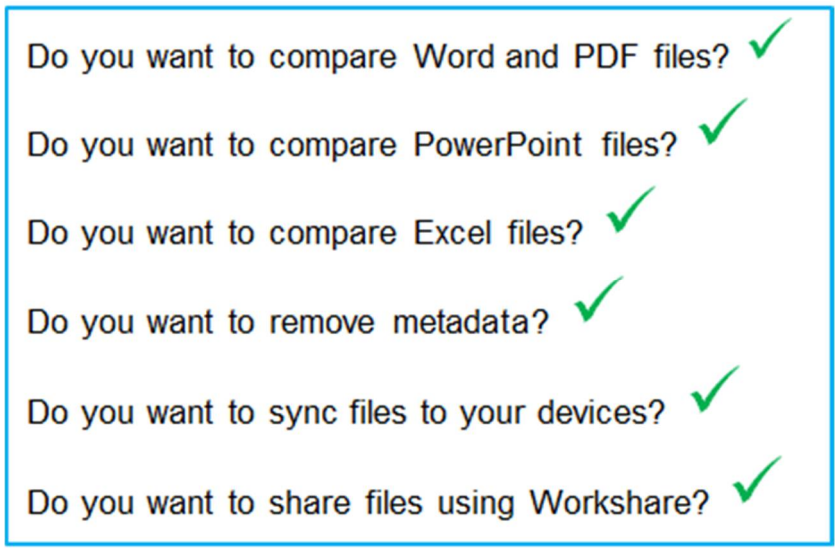
In order to deploy Workshare with specific configuration settings, you must use a REG file or an ADM template. Refer to *Deploying Configuration Settings*. If you are using an Enterprise license, you can include the license REG file in your script.

Note: *The Workshare MSIs must be installed in the order specified above.*

Example installations

The following example installation scripts will install Workshare with different functionality available.

Example 1



Use the following commands:

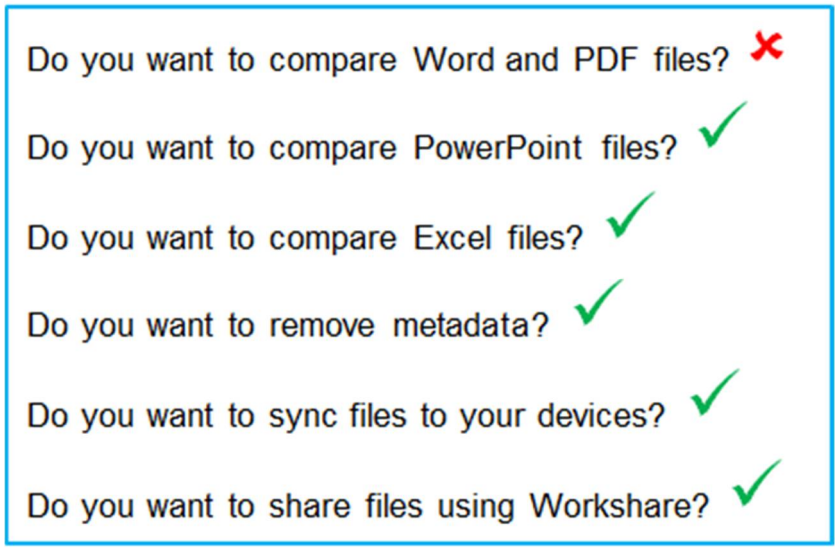
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn
```

Example 2



Use the following commands:

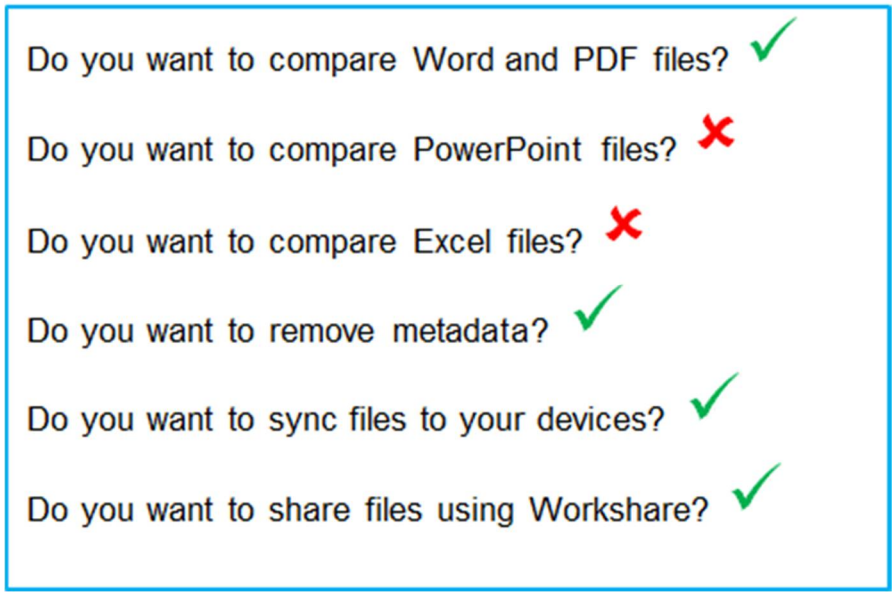
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
~~INSTALL_COMPARE=1~~ /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn
```

Example 3



Use the following commands:

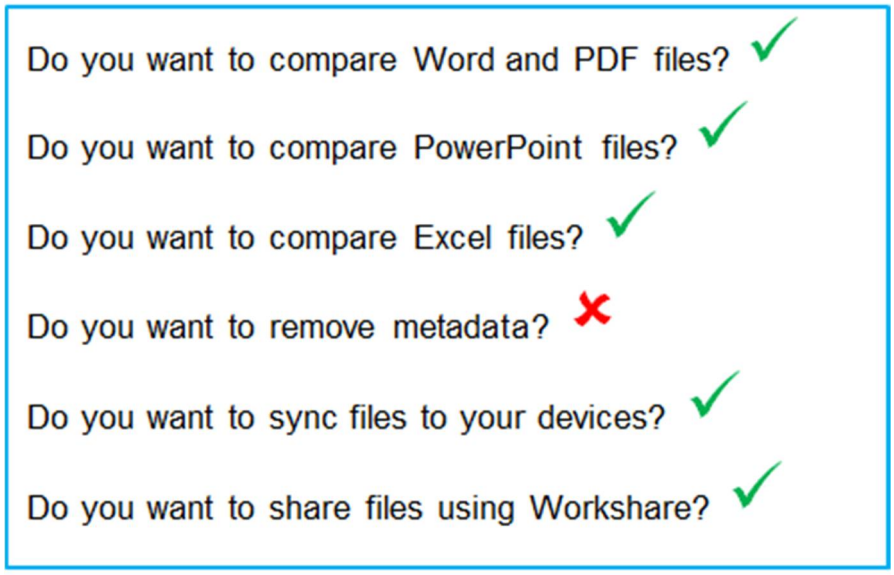
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn
```

Example 4



Use the following commands:

```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

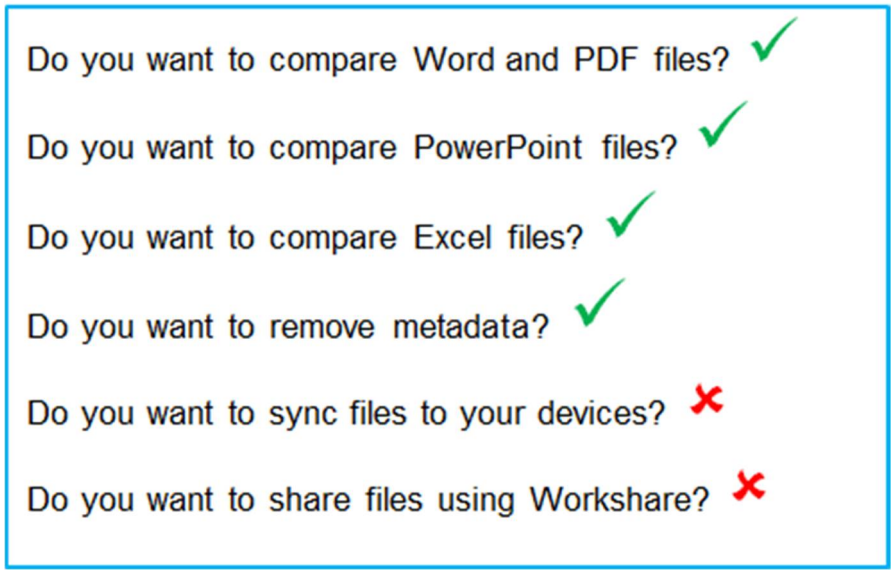
msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn

REG ADD HKLM\SOFTWARE\Workshare\Options\9.05\Protect\SendLink /f
/v DisplayLinkButton /t REG_SZ /d True
```

Example 5



Use the following commands:

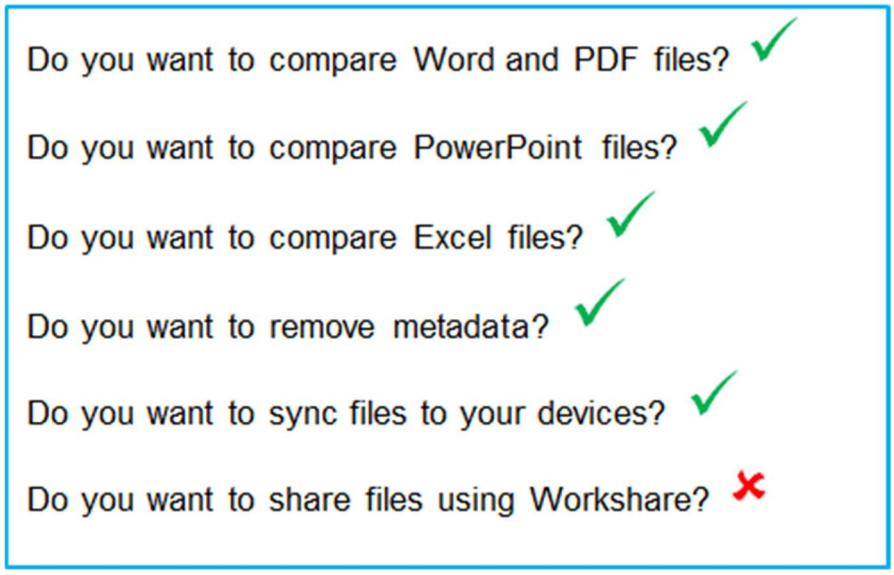
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP UPGRADE WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn
```

Example 6



Use the following commands:

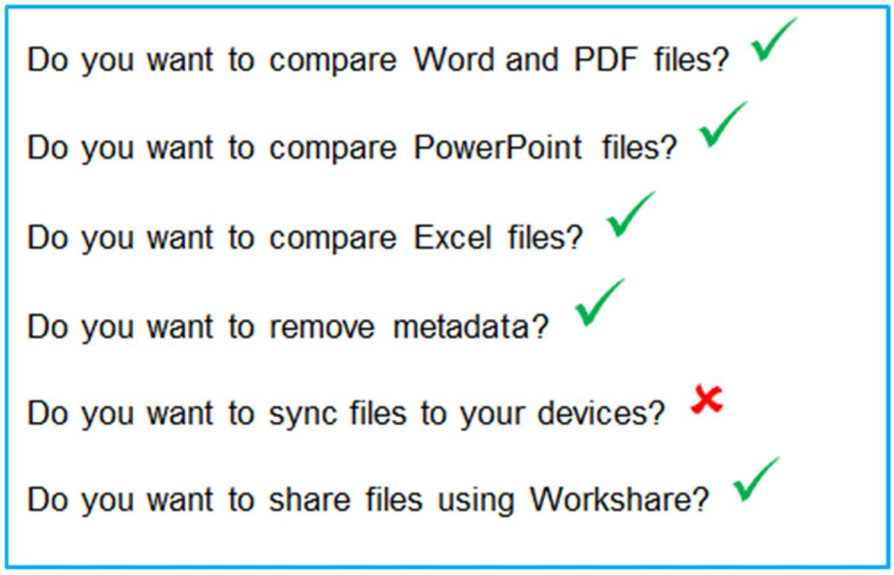
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP UPGRADE WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn
```

Example 7



Use the following commands:

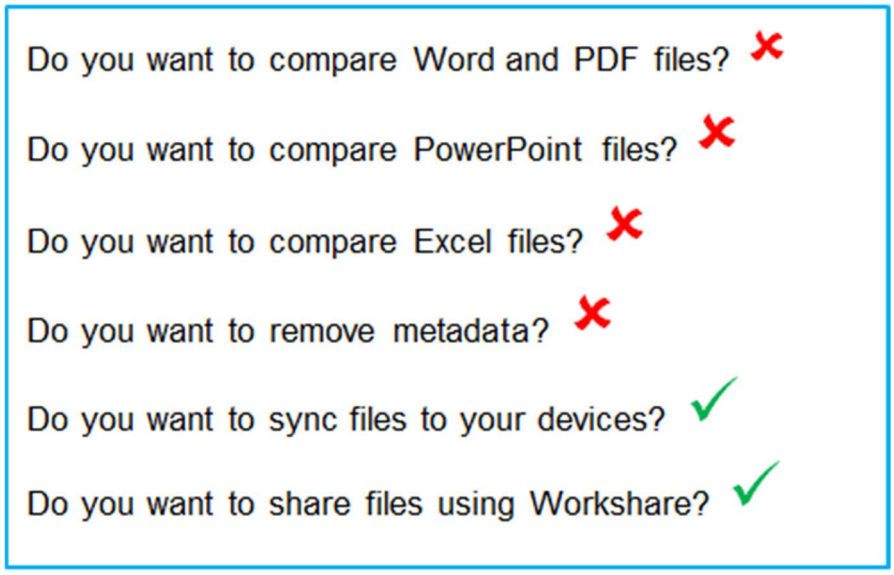
```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 SELECTIVE_SYNC_SHOW_MENU=Off
SELECTIVE_SYNC_DEFAULT_CLOUD=On /qn
```

Example 8



Use the following commands:

```
msiexec.exe /i "<path>\Workshare.Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1
INSTALL_CONNECT=1 INSTALL_SECUREFILETRANSFER=1 INSTALL_PROTECT=1
INSTALL_COMPARE=1 /qn

msiexec.exe /i "<path>\WorkshareCompareForPowerPoint.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.ExcelCompare.msi"
REINSTALLMODE=vomus ALLUSERS=1 /qn

msiexec.exe /i "<path>\Workshare.Desktop.msi" MSIINSTALLPERUSER=
ALLUSERS=2 ENABLEUPDATES=0 /qn

REG ADD HKLM\SOFTWARE\Workshare\Options\9.05\Protect\SendLink /f
/v DisplayLinkButton /t REG_SZ /d True
```

Compulsory properties– Professional/Compare/Protect

The following table shows the compulsory properties that must be specified for the installation of Workshare.

Property	Value
REINSTALL	Ensures that upgrades install correctly. The required value is **ALL**.
REINSTALLMODE	Sets the reinstall mode for upgrades. The default value is **vomus**. This ensures that the latest versions of the MSI packages are cached and older files are overwritten.
ALLUSERS	Installs the application per machine. The required value is **1**.
INSTALLDIR	Specifies the installation folder for Workshare. If this property is not specified, the default value is used which is **<ProgramFilesFolder>\Workshare\Modules**
SKIP_UPGRADE _WARNING	Disables the display of the upgrade warnings when installing Workshare. Required for silent installations. The required value is **1.**

Optional properties – Professional/Compare/Protect

The following table shows the optional properties that can be specified to the Workshare install.

Property	Value
LOGFILE	Name and location of the WCA log file. For example, **LOGFILE=”C:WorkshareConfig.log”**. The log file can either be stored at a shared location or stored locally on the workstation. If a location is not specified for the log file it will be written to the local TEMP folder. By default, the log file is named **WorkshareConfig.log**. The WCA log file will provide details of all the steps the WCA has taken and can be passed to Workshare if any difficulties are encountered. The log file is appended to, not overwritten, in order to retain all logged information. Therefore the latest details will be at the end of the log file.
NOTESINIFILE_PATH	Location of the notes.ini file. This should be specified in non-standard IBM Notes environments to ensure that Workshare components are added correctly to the INI file by the install.

Property	Value
INSTALL_COMPARE	Turns on file comparison (Compare module). To enable installation of the Compare module, set **INSTALL_COMPARE=1**.
INSTALL_CONNECT	Turns on file share & sync. (Connect module; the save and share functionality in the Office and Compare ribbons). To enable installation of this functionality, set **INSTALL_CONNECT=1**.
INSTALL_SECUREFILETRANSFER	Turns on file share & sync. (Connect module; the convert to link functionality in Outlook). To enable installation of this functionality, set **INSTALL_SECUREFILETRANSFER=1**.
INSTALL_DVSHORTCUT	Installs the Workshare Compare shortcut on the desktop. The shortcut is created by default. To prevent the creation of the shortcut set **INSTALL_DVSHORTCUT=0**
INSTALL_HUMMINGBIRD	Turns on OpenText module. To enable installation of the OpenText module, set **INSTALL_HUMMINGBIRD=1**.
INSTALL_INTERWOVEN	Turns on iManage module. To enable installation of the iManage module, set **INSTALL_INTERWOVEN=1**.
INSTALL_PROTECT	Turns on file & metadata security (Protect module). To enable installation of the Protect module, set **INSTALL_PROTECT=1**.
INSTALL_SHAREPOINT	Turns on SharePoint module. To enable installation of the SharePoint module, set **INSTALL_SHAREPOINT=1**.
INSTALL_NETDOCUMENTS	Turns on NetDocuments module. To enable installation of the NetDocuments module, set **INSTALL_NETDOCUMENTS=1**.
INSTALL_WORLDOX	Turns on Worldox module. To enable installation of the Worldox module, set **INSTALL_WORLDOX=1**.
INSTALL_EXCEL_INTEGRATION	Integrates Workshare into Microsoft Excel. To enable installation of the Microsoft Excel integration, set **INSTALL_EXCEL_INTEGRATION=1**.
INSTALL_OUTLOOK_INTEGRATION	Integrates Workshare into Microsoft Outlook. To enable installation of the Microsoft Outlook integration, set **INSTALL_OUTLOOK_INTEGRATION=1**.

Property	Value
INSTALL_POWERPOINT_INTEGRATION	Integrates Workshare into Microsoft PowerPoint. To enable installation of the Microsoft PowerPoint integration, set **INSTALL_POWERPOINT_INTEGRATION=1**.
INSTALL_WORD_INTEGRATION	Integrates Workshare into Microsoft Word. To enable installation of the Microsoft Word integration, set **INSTALL_WORD_INTEGRATION=1**.
CAPTURE_EMAIL	Sets or updates the Workshare option **SubscriptionCaptureEmail** in the Registry. When **CAPTURE_EMAIL=0**, Workshare does not send the user email address as part of the validation call for licensing and as a result a Workshare account is not provisioned. Refer to *Capturing of email* for more information.

Note: *Properties and values are all case sensitive.*
The use of " " should be used where there is character spacing in file paths.

If none of the Compare, Protect or Connect module properties is specified, the Compare, Protect and Connect modules will be installed. If any of the Compare, Protect or Connect module property are specified, then unspecified modules are not installed.

If none of the Microsoft Office integrations is specified, then all integrations are installed and Workshare will integrate with Microsoft Word, PowerPoint, Excel and Outlook. If one of the Microsoft Office integrations is specified, then the others are assumed to be "off" unless specifically specified as "on".

Optional properties – desktop app

The following table shows the optional property that can be specified to the Workshare desktop app install.

Property	Value
UPDATE_CONTROL	Specified how updates are managed. You can specify a value as follows: 0 – automatically download and install updates (default) 1 – notify user when updates are ready to install 2 – do not download or install updates If this property is not specified then the desktop app will automatically download and install updates.

Property	Value
LAUNCH_AFTER_INSTALL	Determines whether the desktop app automatically launches after installation. When LAUNCH_AFTER_INSTALL=1, the desktop app will launch after install. When LAUNCH_AFTER_INSTALL=0, the desktop app will not launch after install.
SELECTIVE_SYNC_SHOW_MENU	Determines whether the **Selective sync** option is shown in the menu. When SELECTIVE_SYNC_SHOW_MENU=1, the **Selective sync** option will be shown. When SELECTIVE_SYNC_SHOW_MENU=0, the **Selective sync** option will not be shown.
SELECTIVE_SYNC_DEFAULT_CLOUD	Determines whether files are synced locally. When SELECTIVE_SYNC_DEFAULT_CLOUD =1, Workshare files can be synced locally. When SELECTIVE_SYNC_DEFAULT_CLOUD =0, Workshare files will not be synced locally.

Citrix Installation Guidelines

Workshare can be installed on a Citrix server using the standard installation process. To restrict the number of users who have access to Workshare, you are required to manually modify the Registry keys.

Note: *Workshare is configured to install on a per machine basis and not a per user basis.*

To install Workshare on the Citrix server:

1. Ensure the Terminal Server is in Install mode.
2. Install Workshare on the Citrix server using the standard installation process. It is recommended that the default folder structure: “Program Files/Workshare/Modules” is retained. Refer to *Chapter 2: Installation on a Single Workstation*, more information.
3. Remove any shortcuts from the desktop if they were created.

The above steps will install Workshare for all users of the Terminal Server. To customize access to Workshare functionality, use the following approach:

Enable Specific Users: Remove Workshare integration from all Microsoft Office applications and then use a logon script deployed to specific users (using Active Directory) to reconfigure the Workshare integration when needed/necessary.

Note: *When the installation remains a per machine install, all users using the Citrix server where Workshare is installed will get Workshare. This may not be required and it will increase the load on the server.*

Enable specific users

These steps are best performed immediately after installation of Workshare. You can find the Citrix reg files needed for this procedure (CitrixProfessionalDisableLocalMachine.reg, CitrixProfessionalDisableUser.reg and CitrixProfessionalEnableUser.reg) in the Modules folder.

To disable Workshare for all Microsoft Office users:

1. Remove All Users/Current User Registry settings as follows: Execute CitrixProfessionalDisableLocalMachine.reg/CitrixProfessionalDisableUser.reg.
2. Manually remove Workshare Batch Clean.lnk (if Workshare Protect is enabled) from All Users/Current User [SendTo] folder, so that the corresponding context menu items in right click > Send to are removed.

To enable Workshare Professional for individual Microsoft Office users:

1. Enable Current User Registry settings as follows: Execute CitrixProfessionalEnableUser.reg.
2. If you have Workshare Protect enabled, run Workshare.Protect.UserInit.exe to bring back Workshare Batch Clean.lnk.

Active Directory Deployment Guidelines

You can deploy Workshare across your network using Active Directory. “Assigned to machine” installation is the preferred method of distributing Workshare via Active Directory.

The “assigned to user” and “published to user” methods are outlined below.

Assigned/published to user methods

In general, it is not recommended to deploy Workshare using the assigned to user or published to user methods. These methods do not complement the way Workshare works for the following reasons:

- If all previous installations of Workshare were assigned to machine installs, a subsequent assigned/published to user install will not remove previous versions of Workshare.

- The Workshare application is not designed to support user isolation for either assigned or published to user in Active Directory deployment. Whilst Workshare will operate normally for the user for which it is installed, it will also be partially visible to other users - other users on the machine will see the Workshare menu but will not be able to use it. If an application has been assigned or published to a user, another user should not be able to see it or operate it at all.

Note: *With Workshare, another user has the Workshare tab in Microsoft Word but when an option is clicked, the error:* ***"WinWord.exe Unable to perform request: Unexpected exception"*** *is displayed.*

The published to user method does not install the software but it installs 'entry points' so that it looks to the user like the software is installed. However, the software is not installed until it is used - when an 'entry point' is activated, the software is installed. An 'entry point' can be things like a desktop shortcut, a start menu shortcut, a file extension or a template.

For example, if publishing Adobe Acrobat to a user, the following would happen:

- Shortcuts are placed wherever Adobe Acrobat has assigned its shortcuts (such as the desktop and start menu).
- File extension associations for PDF are linked to Adobe Acrobat.
- The software will then install if the user either attempts to click on one of the shortcuts or attempts to open a .PDF.

The published to user method uses a technology called JIT (just-in-time). This enables an administrator to deploy the software to every user (for example) and the software will only be actually installed to the users that require it. This saves on bandwidth, licensing and workstation disk space.

With Workshare, there are no valid entry points. There is no shortcut that users click on to launch Workshare (it is opened via Microsoft Word).

The only feature that will work with published to user is the “add new software” entry under add/remove programs.

Deploying Workshare using Active Directory

Note: *Before installing using this method, please refer to the section, Deploying via the Command Line, page 80.*

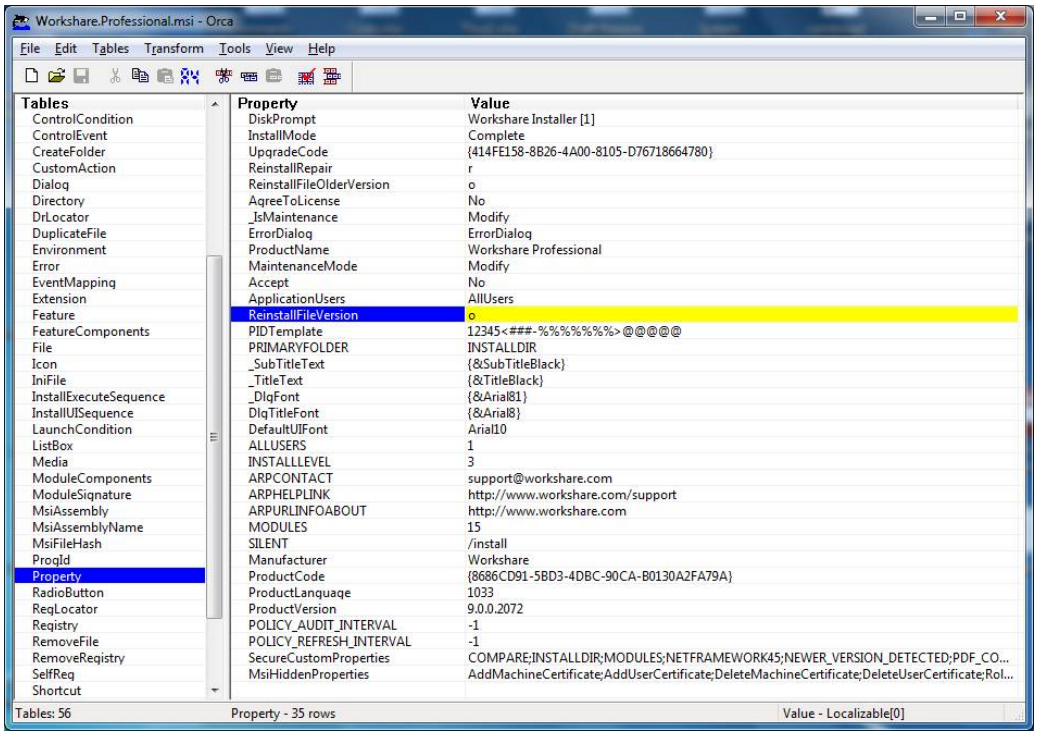
If you want to deploy specific configuration settings with Workshare, you must use a REG file or an ADM template. Refer to *Chapter 3: Configuration.*

If you are using an Enterprise license, you must include the license REG file in your script.

The following procedure must be completed for each of the installation components of Workshare – Workshare.Professional.msi/WorkshareCompare.msi/WorkshareProtect.msi/WorkshareCompareForPowerPoint.msi/Workshare.ExcelCompare.msi/Workshare.Desktop.msi. The following example illustrates how to create the Workshare.Professional.msi Active Directory group policy.

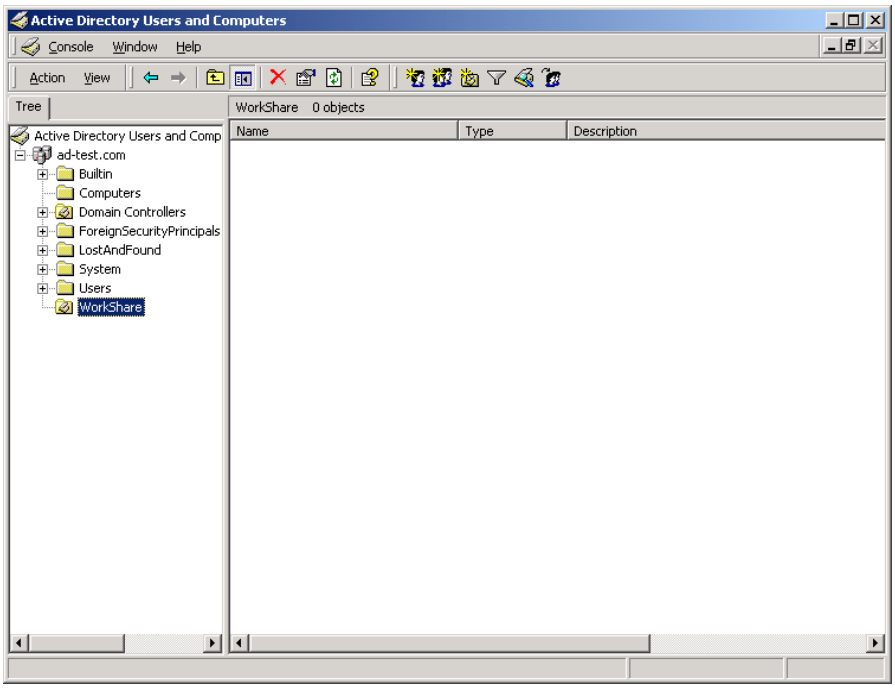
To deploy Workshare using Active Directory:

1. On the Windows Server machine, create a shared folder with relevant permissions so that client machines can access the Workshare MSI during the automatic installation.
2. Extract the MSI file from the EXE install file and copy it into the folder created in step 1.
3. Create a transform (MST) file. The transform file is used to specify properties, such as INSTALLDIR, during the installation. The following procedure describes how to create a transform file using the Orca utility provided in the Windows Installer Software Developers Kit.
4. Launch Orca.
5. Open the Workshare.Professional.msi file.



6. From the *Transform* menu, select **Generate Transform** and the save the transform file to the shared folder created in step 1.

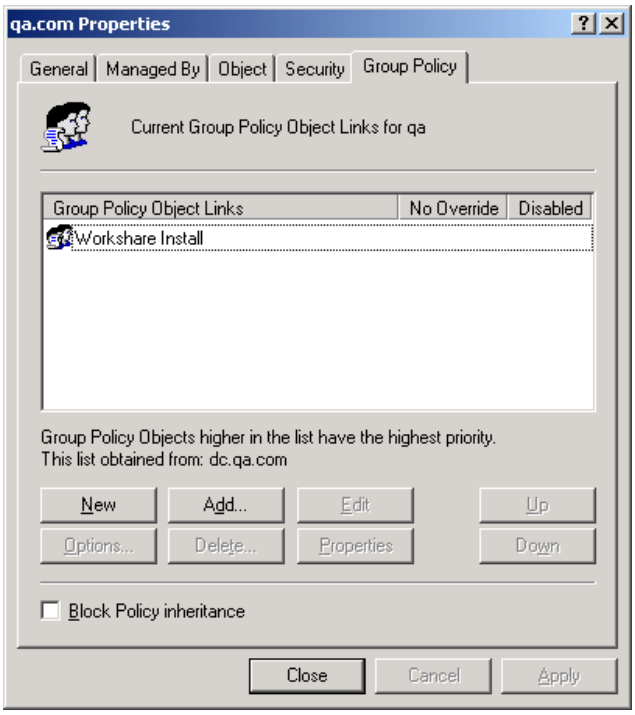
7. From the Start menu, launch **Active Directory Users and Computers**. A list of organizational units is displayed on the left side.



8. You now have to configure a group policy for the users to which you will deploy Workshare Professional. This is done for each organizational unit that includes users to which you want to deploy.

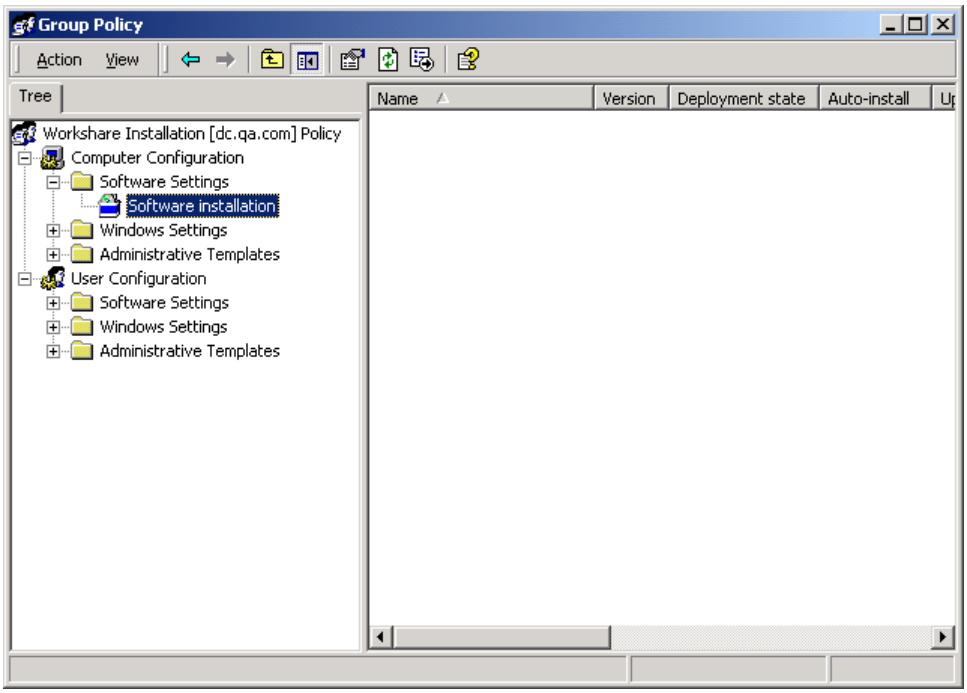
9. Right-click an organizational unit and select **Properties**.

10. In the **Group Policy** tab, click the **New** button and enter a name for the new policy.



11. Select the new policy in the upper area and click the **Properties** button.
12. In the **Security** tab, click **Add**. A list of users in the organizational unit is displayed.
13. For all users to which you will deploy Workshare Professional, ensure that at a minimum the following permissions are selected:
    - **Read**
    - **Apply Group Policy**
14. For any users to which you do not want to deploy Workshare Professional, ensure that the **Apply Group Policy** permission is not selected.
15. Click **OK**.
16. In the **Group Policy** tab, select the policy in the upper area and click the **Edit** button. The *Group Policy* window is displayed.

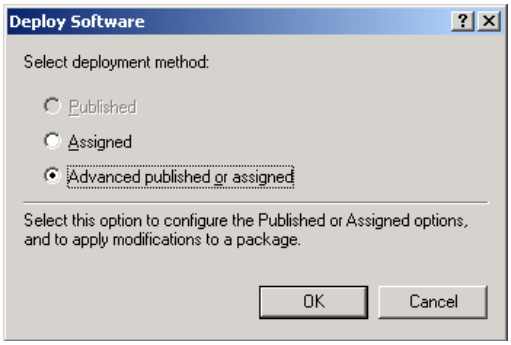
17. Expand the Computer Configuration tree and the Software Settings node.



18. Right-click **Software installation** and select **New** then **Package**.

19. Browse to the shared folder and select the Workshare.Professional.msi/ WorkshareCompare.msi/WorkshareProtect.msi/WorkshareCompareFor PowerPoint.msi/Workshare.ExcelCompare.msi/Workshare.Desktop.msi/Workshare.Outlook.msi file.

20. Click **Open**. The *Deploy Software* dialog is displayed.



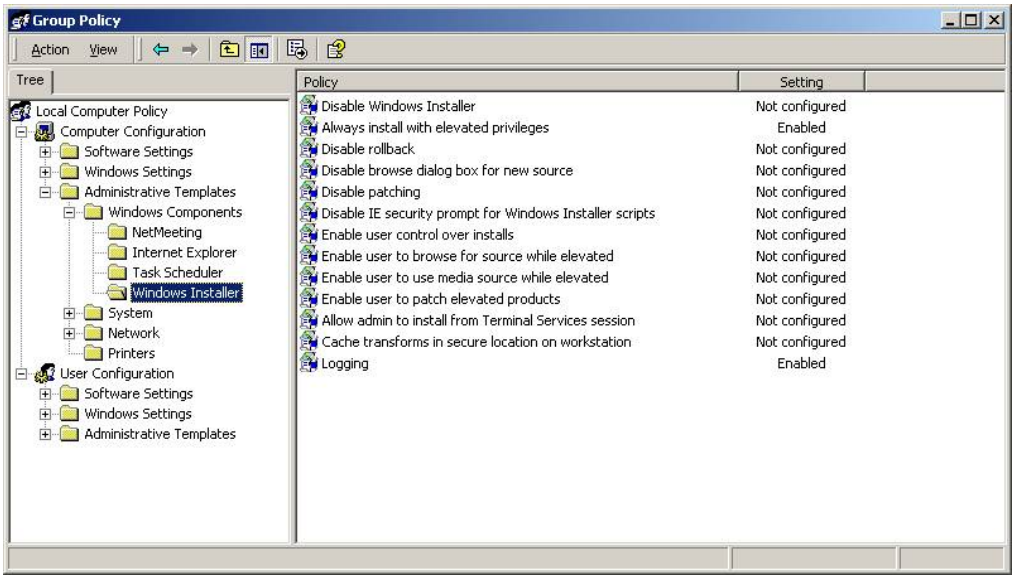
21. Ensure that the **Advanced published or assigned** option is selected and click **OK**.

22. In the **Modifications** tab, click **Add**.

23. Browse to the transform (MST) file created in steps 4 to 13 and click **Open**.

24. Click **OK**.

25. In the *Group Policy* window, expand the **Administrative Templates** node and then the **Windows Components** node.
26. Select Windows Installer.
27. On the right side of the *Group Policy* window, double-click **Logging**.
28. Select the **Enabled** radio button and in the **Logging** field, enter **voicewarmup**.
29. Click **OK**. Logging of Windows Installer is now enabled. The log file generated will be in the format **msi<random letters and numbers>.log**.



30. Close the *Group Policy* window and close the organization unit's *Properties* window.
31. Repeat steps 15 to 36 for other organizational units to select all the users (machines) to which you want to deploy Workshare Professional.

The Workshare package is now ready to be deployed on a per-machine basis. The next time the client machines are rebooted, Workshare will be installed.

Note: *Client machines may have to be rebooted more than once depending on their configuration.*

Appendix A. Additional Msiexec.exe Parameters and Switches

Msiexec.exe Parameters and Switches

The executable program that interprets packages and installs products is msiexec.exe. Note that msiexec also sets an error level on return that corresponds to system error codes. The following table describes the parameters and switches for this program. For the latest msiexec.exe parameters and switches, please refer to https://msdn.microsoft.com/en-us/library/windows/desktop/aa367988(v=vs.85).aspx

Switch	Parameters	Meaning
/i	Package|Product Code	Installs or configures a product.
/f	[p|o|e|d|c|a|u|m|s|v] Package|Product Code	Repairs a product. This option ignores any property values entered on the command line. The default argument list for this option is 'pecms'. This option shares the same argument list as the REINSTALLMODE property. p Reinstall only if file is missing. o Reinstall if file is missing or if an older version is installed. e Reinstall if file is missing or an equal or older version is installed. d Reinstall if file is missing or a different version is installed. c Reinstall if file is missing or the stored checksum does not match the calculated value. Only repairs files that have msidbFileAttributesChecksum in the Attributes column of the File table. a Force all files to be reinstalled. u Rewrite all required user specific Registry entries. m Rewrite all required computer-specific Registry entries. s Overwrite all existing shortcuts. v Run from source and re-cache the local package. Do not use the v reinstall option for the first installation of an application or feature.
/a	Package	Administrative installation option. Installs a product on the network.
/x	Package|Product Code	Uninstalls a product.

Switch	Parameters	Meaning
/j	[u|m]Package or [u|m]Package /t Transform List or [u|m]Package /g LanguageID	Advertises a product. This option ignores any property values entered on the command line. u Advertise to the current user. m Advertise to all users of machine. g Language identification. t Applies transform to advertised package.
/L	[i|w|e|a|r|u|c|m|o|p|v|+|!]Logfile	Specifies path to log file and the flags indicate which information to log. i Status messages w Non-fatal warnings e All error messages a Start up of actions r Action-specific records u User requests c Initial UI parameters m Out-of-memory or fatal exit information o Out-of-disk-space messages p Terminal properties v Verbose output + Append to existing file ! Flush each line to the log "*" Wildcard, log all information except for the v option. To include the v option, specify "/l*v".

Switch	Parameters	Meaning
/m	filename	Generates an SMS status .mif file. Must be used with the install (-i), remove (-x), administrative installation (-a), or reinstall (-f) options. The ISMIF32.DLL is installed as part of the SMS and must be on the path. The fields of the status mif file are filled with the following information: Manufacturer - Author Product - Revision Number Version - Subject Locale - Template Serial Number - not set Installation - set by ISMIF32.DLL to "DateTime" InstallStatus - "Success" or "Failed" Description - Error messages in the following order: 1) Error messages generated by installer. 2) Resource from Msi.dll if install could not commence or user exit. 3) System error message file. 4) Formatted message: "Installer error %i", where %i is error returned from Msi.dll
/p	PatchPackage	Applies a patch. To apply a patch to an installed administrative image you must combine options as follows: /p <PatchPackage> /a <Package>
/q	n|b|r|f	Sets user interface level. q No UI qn No UI qb Basic UI. Use qb! to hide the Cancel button. qr Reduced UI with no modal dialog displayed at the end of the installation. qf Full UI and any authored FatalError, UserExit, or Exit modal dialoges at the end. qn+ No UI except for a modal dialog displayed at the end. qb+ Basic UI with a modal dialog displayed at the end. The modal box is not displayed if the user cancels the installation. Use qb+! or qb!+ to hide the Cancel button. qb- Basic UI with no modal dialoges. Please note that /qb+- is not a supported UI level. Use qb-! or qb!- to hide the Cancel button. Note that the ! option is available with Windows Installer version 2.0 and works only with basic UI. It is not valid with full UI.
/? or /h		Displays copyright information for the Windows Installer.

Switch	Parameters	Meaning
/y	Module	Calls the system API DllRegisterServer to self-register modules passed in on the command line. For example, msiexec /y my_file.dll. This option is only used for Registry information that cannot be added using the Registry tables of the MSI file.
/z	Module	Calls the system API DllUnRegisterServer to unregister modules passed in on the command line. For example, msiexec /z my_file.dll. This option is only used for Registry information that cannot be removed using the Registry tables of the MSI file.

The options /i, /x, /f[p|o|e|d|c|a|u|m|s|v], /j[u|m], /a, /p, /y and /z should not be used together. The one exception to this rule is that patching an administrative installation requires using both /p and /a. The options /t and /g should only be used with /j. The options /l and /q can be used with /i, /x, /f[p|o|e|d|c|a|u|m|s|v], /j[u|m], /a, and /p.

Workshare Ltd.
© 2019. Workshare Ltd. All rights reserved.

Copyright
Workshare Professional and Workshare DeltaView are registered trademarks of Workshare Ltd. Workshare Compare, Workshare Protect, Workshare 3, Workshare DeltaServer, SafetyGain, and the Workshare logo are trademarks of Workshare Ltd. All other trademarks are those of their respective holders.

Trademarked names may appear throughout this guide. Instead of listing these here or inserting numerous trademark symbols, Workshare wishes to state categorically that no infringement of intellectual or other copyright is intended and that trademarks are used only for editorial purposes.

Disclaimer
The authors/publishers of this guide and any associated help material have used their best efforts to ensure accuracy and effectiveness. Due to the continuing nature of software development, it may be necessary to distribute updated help from time to time. The authors would like to assure users of their continued best efforts in supplying the most effective help material possible.

The authors/publishers, however, make no warranty of any kind, expressed or implied, with regard to Workshare programs or help material associated with them, including this guide. The authors/publishers shall not be liable in the event of incidental or consequential damages in connection with, or arising out of, the programs or associated help instructions.

For details of Workshare patents, see www.workshare.com/patents

Revisions
Published for Workshare Professional 10: 18/12/18; minor revisions: 17/1/19 & 15/2/19
Revised for Workshare Professional 10.1: 27/3/19
Revised for Workshare Professional 10.1 Revision 1: 16/5/19

Workshare Ltd., 20 Fashion Street, London E1 6PX www.workshare.com