

# WORKSHARE PROTECT SERVER 3.2

## RELEASE NOTES



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Workshare Protect Server Release Notes

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## INTRODUCTION

Workshare Protect Server enables organizations to define and enforce security policies preventing harmful metadata from leaking to the outside world. Workshare Protect Server is designed to work well with all mail servers, including Microsoft Exchange environments, without the need to install additional components on the mail servers themselves.

Workshare Protect Server is a mail gateway that removes metadata from Microsoft Office attachments (Word, Excel and PowerPoint) as well as PDF attachments. It can also automatically convert Microsoft Office attachments to PDF. A web application - the Workshare Protect Server web console – is provided to enable administrators to configure which metadata elements to remove and view a history of what was previously removed.

Workshare Protect Server provides server-based metadata cleaning and provides coverage for email from BlackBerry PDAs and Webmail (Outlook Web Access/Domino iNotes) as well as email from SMTP email servers (Microsoft Exchange or IBM Lotus Domino). Locating metadata cleaning on the server minimizes desktop applications and Outlook/Lotus Notes plug-ins that may impact email performance.

Email sent by any of the channels mentioned are always routed through the main Exchange/Domino server for which Workshare Protect Server acts a relay/final delivery server.

## SYSTEM REQUIREMENTS

Workshare Protect Server is designed to run on both entry level and enterprise scale servers. Recommended specifications are given below:

### Hardware

CPU	64-bit architecture-based computer with Intel or AMD processor
Memory	8GB RAM (12GB RAM for Windows Server 2012)
Storage	1GB free disk space for installation
Networking	Gigabit Ethernet Controller

### Supported Operating Systems

- Microsoft Windows Server 2012 R2 Standard/Datacenter x64 Edition (recommended)
- Microsoft Windows Server 2012 Standard/Datacenter x64 Edition
- Microsoft Windows Server 2008 R2 Standard x64 Edition
- Microsoft Windows Server 2008 Standard x64 Edition

**Notes:****Microsoft Windows Server 2003**

Support for Windows Server 2003 (x86 and x64) has been removed from Workshare Protect Server.

*It is recommended that you upgrade the server to the latest service pack.*

## Prerequisites

The following software must be installed prior to the installation of Workshare Protect Server. The first three are installed automatically by running the scripts provided by Workshare.

- Application Server and Web Server (IIS) Roles configured on Microsoft Windows Server.
- Microsoft IIS (Internet Information Services) 6.0, 7.0 or 7.5 with virtual SMTP service installed
- Microsoft Message Queue
- Microsoft SQL Server 2012-2005 SP3 with Full Text Search

**Note:** Only Microsoft SQL Server Express Advanced editions have Full Text Search while SQL Express editions do not.

**Note:** If Workshare Protect Server is to be configured to run in with a remote SQL database, ensure that both machines (Workshare Protect Server and Microsoft SQL Server) are on the same domain and that the credentials used to configure SQL are sufficient to authenticate against the domain controller.

The following software is required but if it has not been pre-installed, it will be installed during the installation of Workshare Protect Server by the Workshare.ProtectServer.InstallWizard.exe.

- Microsoft .NET Framework 3.5 SP1 or higher
- Microsoft ASP.NET MVC 1.0
- Windows Installer for Server 2008 (x64/x86)
- Windows Visual C++ 2008 SP1 Redistributable Package (x86/x64)
- Windows Visual C++ 2005 SP1 Redistributable Package (x86/x64)
- Microsoft SQL Server Compact 3.5 SP2 (x86/x64)

## Virtual Environments

Workshare Protect Server is supported in virtual environments. Workshare makes extensive use of virtual environments in the testing, development and support of Workshare Protect Server. Workshare is not aware of any issues with Workshare Protect Server running in a virtual environment.

## UPGRADING WORKSHARE PROTECT SERVER

Workshare Protect Server 3.2 supports upgrades from Protect Server 2.2. The upgrade process is automatic and running the new Workshare Protect Server 3.2 installation file will automatically uninstall the previous installation before running the Protect Server 3.2 installer. The uninstall will preserve the Workshare Protect Server database and once the Protect Server 3.2 installer runs it will upgrade the existing database preserving all data therein. The following steps should be taken prior to the upgrade process.

### Step 1: Backup the Existing Workshare Protect Server Database

It is recommended that you perform the backup at the latest possible time before the upgrade procedure.

### Step 2: Ensure Install User Requirements

For the upgrade/install, the install user will need to be logged into the Protect Server box as a DOMAIN user who:

- Is a local administrator on the box (in order to execute the installation itself)
- Is a user on the MSSQL server hosting the Workshare Protect Server database with the sysadmin role

## WHAT'S NEW IN THIS RELEASE

Workshare Protect Server 3.2 includes the following improvement:

### Support for Payne Metadata Assistant

In environments using Payne Metadata Assistant, Workshare Protect Server can be configured to skip cleaning of emails that have been processed by Payne Metadata Assistant. This means that where there is Payne Metadata Assistant installed on the desktop checking emails for metadata, then the emails will not be cleaned again by Workshare Protect Server. However, Workshare Protect Server can still offer cleaning of emails sent from mobile devices.

### Extended Environments

Workshare Protect Server now supports Microsoft Windows Server 2012 R2 Standard/Datacenter x64 Edition and Microsoft Windows Server 2012 Standard/Datacenter x64 Edition.

### Install

Scripts are provided by Workshare to automatically install the following prerequisites: Application Server and Web Server (IIS) Roles configured on Microsoft Windows Server, Microsoft IIS (Internet Information Services) 6.0, 7.0 or 7.5 with virtual SMTP service installed, and Microsoft Message Queue.

## FIXED ISSUES

The following issues have been fixed in Workshare Protect Server 3.2:

CR #	FB ID	Details
521111	21263	Content status built-in property is not removed from .xls files
554094	21537	Subject line is truncated when sending through the Protect Server
374821	18403	Error 'Failure Notice- Your email was not sent' when cleaning PDF documents
660008	22329	Company name built-in property is not removed from .doc files
676817	22346	TestSenderEmailList changes require Microsoft transport services to restart
488009	20704	Messages sent appear in Greenwich Mean Time standard
665867	22245	Unable to process certain PDF documents
682520	22460	How to disable creation of a new email copy in Sent items if the original cannot be found
689925	22755	Incorrectly detects DAT file attachments as being corrupt
	21312	Sent items not updated when profile address is saved as mail contact in Exchange

## KNOWN ISSUES

### Metadata Cleaning

The following are known issues with metadata cleaning in the current Workshare Protect Server release – for more information, please contact Customer Support.

Files	Details	ID
<b>Microsoft Word</b>	When a table of authorities is unlinked during cleaning, citations may also be removed.	<b>19502</b>
	When a profile is configured to clean embedded objects, embedded charts in Word 2007 documents are not cleaned.	<b>10000</b>
	Highlighted text and small text contained within track changes is not cleaned.	<b>19497</b>
	Routing slips are not cleaned.	<b>19506</b>
	When a profile is configured to clean some smart tags and skip others, no smart tags are cleaned.	<b>19492</b>

Files	Details	ID
	When a profile is configured to clean redacted text and track changes, redacted text created after enabling track changes in the document is not cleaned.	19496
	Word 2007 XML documents that include embedded charts are not cleaned and an error is generated.	19495
	Even when the <b>Embedded Fonts</b> option is selected for documents (in the “Metadata to be removed and cannot be preserved” section) in the profile, embedded fonts are not cleaned in Word documents.	10430
<b>Microsoft Excel</b>	ODS spreadsheets are not cleaned and trigger a processing error	19483
	After cleaning headers and footers from an ODS spreadsheet, the option to add headers and footers is disabled in the cleaned file.	19488
	Custom document properties are cleaned from an ODS spreadsheet regardless of the settings configured in the profile.	19485
	Built-in properties are cleaned from an ODS spreadsheet regardless of the settings configured in the profile.	19487
	Even when the <b>Embedded Fonts</b> option is selected for spreadsheets (in the “Metadata to be removed and cannot be preserved” section) in the profile, embedded fonts are not cleaned in Excel documents.	10442
<b>Microsoft PowerPoint</b>	After cleaning a PPT file created using right-click ‘Save As’, the cleaned file fails to open.	19521
	After cleaning a PPT file, any strikethrough applied to Speaker Notes may be lost in the cleaned file.	19493
	After cleaning a PPT file, a table may be converted to a picture in the cleaned file.	19509
	After cleaning a POT file, a table may be converted to a picture in the cleaned file.	19511
	When a profile is configured to clean macros from presentations, macros are not removed and are still present in the cleaned PPTM and POTM presentation.	19494
	Even when the <b>Embedded Fonts</b> option is selected for presentations (in the “Metadata to be removed and cannot be preserved” section) in the profile, embedded fonts are not cleaned in PowerPoint documents.	10431
<b>RTF</b>	When a table of authorities is unlinked during cleaning, citations may also be removed.	19503
	After cleaning an RTF file, mail merge settings are lost in the cleaned file.	10316



## PDF Conversion

The following are known issues with PDF conversion in the current Workshare Protect Server release – for more information, please contact Customer Support.

Files	Details	ID
<b>Microsoft Word</b>	When a profile is configured to convert documents to PDF, the conversion of an ODT file fails.	<b>19475</b>
	After converting an ODT file, headers are removed in the resulting PDF file.	<b>10014</b>
<b>Microsoft Excel</b>	After converting an XLSX file that includes a pie chart with a gradient fill, the layout of the pie charts is altered in the resulting PDF file.	<b>19478</b>
	After converting an XLSX file that includes surface charts, the surface charts are removed in the resulting PDF file.	<b>19479</b>
	After converting an XLSX file that includes bubble charts, the 3D effect of the bubble charts is lost in the resulting PDF file.	<b>19481</b>
	After converting an XLS file that includes embedded buttons, the embedded buttons are removed in the resulting PDF file.	<b>19482</b>
	After converting an XLSX file that includes smart art, the smart art is removed in the resulting PDF file.	<b>9994</b>
<b>Microsoft PowerPoint</b>	After converting a PPTX file that contains content controls, the content controls are lost in the resulting PDF file.	<b>19486</b>
	After converting a PPTX file with a Pushpin theme, the resulting PDF file may be corrupted.	<b>10012</b>
	After converting a POTX file that contains charts, the charts are lost in the resulting PDF file.	<b>19519</b>
	When a profile is configured to convert presentations to PDF, the conversion of an ODP file fails.	<b>19512</b>
	After converting a PPT file that contains flowchart arrows, the arrow points are lost in the resulting PDF file. (The arrows appear as lines.)	<b>19500</b>
	After converting a PPTX file that contains clipart in the background, the clipart is cropped at the top and bottom in the resulting PDF file.	<b>19501</b>
	After converting a POTX file that contains WordArt, the WordArt is lost in the resulting PDF file.	<b>19518</b>
	After converting an PPTX file that includes text wrapped around a cylinder, the layout is altered in the resulting PDF file whereby the cylindrical shape is changed to a circle and the text spills out of the circle.	<b>19516</b>

## Other

The following are other known issues in the current Workshare Protect Server release – for more information, please contact Customer Support.

Area	Details	ID
<b>Console</b>	The Workshare Protect Server web console may take some time to load.	<b>19913</b>
<b>Bounce</b>	The message log displays information about “Review metadata” when an unsupported document is sent along with supported attachments containing comments/track changes.	<b>19480</b>
<b>Clean Report</b>	The clean report does not include information about Ink Annotations cleaned from documents.	<b>19477</b>
<b>Configuration</b>	In the Workshare Protect Server web console, the checkmarks shown in the Profiles page under 'DOC/XLS/PPT/PDF' continue to appear even after deselecting the <b>Process Metadata</b> checkbox for documents, spreadsheets, presentations or PDF files.	<b>19471</b>
	In the Workshare Protect Server web console, after a profile has been saved the 'General' page or tab is shown highlighted.	<b>19474</b>
<b>Reports</b>	The Exceptions report does not display the count for “Digitally signed attachment” and “Digitally signed email” separately.	<b>10026</b>
<b>Numara</b>	Messages sent from Numara software are not delivered.	<b>20663</b>

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