

WORKSHARE PROTECT SERVER 3.2

USER GUIDE



COMPANY INFORMATION

Workshare Protect Server User Guide

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CHAPTER 1. INTRODUCING WORKSHARE PROTECT SERVER

This chapter introduces Workshare Protect Server, providing an overview of how it works as well as a summary of the key features and benefits. It includes the following sections:

- **What is Workshare Protect Server?**, page 5, introduces Workshare Protect Server.
- **Workshare Protect Server Functionality**, page 5, describes the different functionality available with Workshare Protect Server.
- **Types of Metadata**, page 7, describes the different types of metadata that Workshare Protect Server can clean from attachments.
- **Workshare Protect Client**, page 12, describes how Workshare Protect Server interacts with Workshare Protect Client.

WHAT IS WORKSHARE PROTECT SERVER?

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.

WORKSHARE PROTECT SERVER FUNCTIONALITY

Workshare Protect Server provides the following functionality:

Metadata Cleaning for External Email

Workshare Protect Server cleans attachments of email leaving an organization at one messaging site. Where emails are sent to both internal and external recipients (without Workshare Protect Server Routing Agent installed), the internal recipient will receive the document containing metadata and the external recipient will receive a version cleaned of metadata.

Workshare Protect Server cleans Microsoft Office and PDF attachments. The following file formats can be cleaned:

- Microsoft Office 97 or later (DOC, DOT, DOCX, DOTX, DOCM, DOTM, XLS, XLT, XLSX, XLTX, PPT, POT, PPTX, POTX)
- RTF
- Word 2003 XML
- Open Document Text (ODT)
- PDF

Note: *Workshare Protect Server does not clean encrypted documents, digitally signed documents or corrupt documents and does not check the attachments of digitally signed emails.*

Workshare Protect Server also cleans the contents of archive (ZIP) attachments as well as attachments of embedded emails.

Note: *Workshare Protect Server does not check the contents of encrypted archive files.*

Workshare Protect Server also cleans attachments to Meeting Requests and other Microsoft Exchange-specific features, such as polls and forms.

PDF Conversion for External Email

Workshare Protect Server converts attachments of external emails to PDF or PDF/A files. The following file formats can be converted:

- Microsoft Office 97 or later (DOC, DOT, DOCX, DOTX, DOCM, DOTM, XLS, XLT, XLSX, XLTX, PPT, POT, PPTX, POTX)
- RTF
- Word 2003 XML
- Open Document Text (ODT)

Note: *Workshare Protect Server does not convert encrypted documents, digitally signed documents or corrupt documents and does not check the attachments of digitally signed emails.*

Workshare Protect Server also converts the contents of archive (ZIP) attachments as well as attachments of embedded emails.

Note: *Workshare Protect Server does not convert the contents of encrypted archive files.*

Workshare Protect Server also converts attachments to Meeting Requests and other Microsoft Exchange-specific features, such as polls and forms.

Clean Reports for Senders

Senders receive a clean receipt email with a Clean Report PDF attached providing details of the exact metadata cleaned from the document. The clean receipt email can also include the original email and the processed attachments. Administrators configure clean receipts on the Workshare Protect Server web console.

Additionally, where you send emails with attachments to internal and external recipients, the internal recipients will also receive a clean receipt email with the processed attachments. This is to ensure that internal recipients always have access to the same version of attachments that are received by external recipients. This will only occur if your administrator has configured a clean receipt email on the Workshare Protect Server web console.

Bouncing Emails

Workshare Protect Server can be configured to prevent emails with attachments that include comments or track changes or that cannot be processed from being delivered. There are several reasons why Workshare Protect Server may not be able to process an attachment, for example, the attachment may be corrupt, digitally signed or password-protected. When Workshare Protect Server is configured this way, it bounces the email back to the sender with a non-delivery report. Administrators configure which emails to bounce on the Workshare Protect Server web console.

Preview Functionality for Senders

Workshare Protect Server provides previews of the cleaned/converted attachments to the sender. The sender can request a preview of what the processed attachments will look like before sending them to the recipients. This is done by sending an email to a profile email address only. Workshare Protect Server will treat such an email as a preview request and send the processed attachments back to the sender.

Web Console for Configuration

The functionality available in the Workshare Protect Server web console depends on the type of user.

- Users allocated a Business Role can do the following:
 - Access detailed statistics on the activities of Workshare Protect Server. For example, how many emails were processed using each profile and how many emails were processed in Microsoft Word format.
 - Search through and view emails that they themselves have sent through Workshare Protect Server. They cannot search or view emails sent by other users.
 - View profiles configured for Workshare Protect Server. They cannot create new profiles or modify or delete existing profiles.
- Users allocated a User Role can do the following:
 - Search through and view emails that they themselves have sent through Workshare Protect Server. They cannot search or view emails sent by other users.
 - View profiles configured for Workshare Protect Server. They cannot create new profiles or modify or delete existing profiles.

Note: Roles are allocated during installation.

Synchronization

When any email attachment is processed by Workshare Protect Server, the original copy of the email found in your “Sent Items” folder can be updated with the processed attachment. This update occurs for email destined for external recipients only as well as emails destined for both internal and external recipients.

Additionally, to ensure that internal recipients always have access to the same version of attachments that are received by external recipients, where emails are sent internally and externally, the internal recipients can receive a clean receipt with the processed attachment included.

Administrators configure synchronization on the Workshare Protect Server web console.

Workshare Protect Server Routing Agent

If you have the Workshare Protect Server Routing Agent installed, Workshare Protect Server cleans attachments of emails that are sent to both internal and external recipients.

When an email has a relevant attachment and includes both external and internal recipients, the Workshare Protect Server Routing Agent will ensure that both the internal recipient and the external recipient will receive a version cleaned of metadata.

TYPES OF METADATA

Your administrator defines profiles which determine what metadata Workshare Protect Server will clean from email attachments. The types of metadata that may be cleaned from Microsoft Office and PDF documents include:

- **Attachments – PDF**

PDF attachments are separate files contained within the PDF document.

- **Bookmarks – MS Word, PDF**

Bookmarks are used to aid document navigation and automation. Bookmarks can link to a particular section of text or act as placeholders for data populated during document automation, which involve third-party macros. Bookmarks may also be placeholders for paragraphs, which can be freely edited during production.

- **Built-in Properties – MS Office**

Built-in properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base.

- **Comments – MS Office**

Comments are notes and suggestions that are added to a document via the comment feature to aid collaborative online review.

- **Content Controls – MS Word**

Content controls are used in structured documents to control how the layout, behavior, and properties (for example) of pre-defined document elements.

- **Custom Properties – MS Office**

Custom properties are those you define. You can assign a text, time, or numeric value to custom properties, or assign them the values "yes" or "no." You can also choose from a list of suggested names or define your own. You can optionally link custom document properties to specific items in your file, or a bookmark. For example in a contract form created in Word, you can create a custom file property that is linked to a form field that contains the contract's expiry date. Then you can search for all contract files with expiry dates earlier than a date you specify.

- **Custom XML – MS Word**

XML support lets you add structured-data elements to documents, thereby expediting automation and enabling interaction with other business applications that use structured data.

- **Document Properties – PDF**

Document properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base.

- **Document Statistics – MS Office**

Document statistics include information on when the document was created, when it was modified, when it was accessed, and when it was printed. In addition, document statistics display the name of the person it was last saved by, the revision number, and the total editing time. Other statistics include number of pages, paragraphs, lines, words, and characters.

- **Document Variables – MS Word**

Document variables are values stored in Microsoft Word documents that are used by either field codes or macros.

- **Embedded Objects – MS Word & Excel**

An embedded object is information contained in a source file and inserted into a destination file. Once embedded, the object becomes part of the destination file and any changes you make to the embedded object are reflected in the destination file. A linked object is an object that is created in a source file and inserted into a destination file, while maintaining a connection between the two files. The linked object in the destination file can be updated when the source file is updated. These objects may appear either as another document nested within the body of a Word document, or as a connection to another document.

- **Endnotes – MS Word**

Endnotes are text inserted at the end of a document.

- **Fast Saves – MS Word**

Fast saves is an option in Microsoft Word 2003 (SP2 and earlier) that saves only the changes made to a document at the end of the document. The deleted content is not overwritten in the document and can be viewed when saving the document as “recovered text.”

- **Fields – MS Word**

Word uses field codes as placeholders for dynamic data which it updates automatically when you perform routine tasks. For example, when you insert a page number, when you insert a document building block such as a cover page, or when you create a table of contents. You can also manually insert fields to automate aspects of your document, such as merging data from a data source or performing calculations.

- **Footers – MS Word & Excel**

Footers are areas at the bottom of some or all pages in a document.

- **Footnotes – MS Word**

Footnotes are commonly used to annotate text in the body of a document. They appear on the same page as the referenced text.

- **Formulas – MS Excel**

Formulas are equations used to calculate values.

- **Headers – MS Word & Excel**

Headers are areas at the top of some or all pages in a document.

- **Hidden Columns – MS Excel**

Hidden columns are columns that have been formatted as hidden.

- **Hidden Rows – MS Excel**

Hidden rows are rows that have been formatted as hidden.

- **Hidden Slides – MS PowerPoint**

Hidden slides are slides that have been formatted as hidden.

- **Hidden Text – MS Word**

Hidden text is text that has been formatted as hidden. Unless specifically selected to be viewed in Microsoft Word, hidden text is not displayed within the document. Depending on the settings in Word, hidden text may be printed.

- **Hidden Worksheets – MS Excel**

Hidden worksheets are worksheets that have been formatted as hidden.

- **Highlighted Text – MS Word**

Users use highlighting in the same way they use comments or to draw attention to some text in the body of a document. This is especially useful in collaborative efforts; one user might highlight a passage of text indicating to others that he or she needs more input, for example.

- **Hyperlinks – MS Word & Excel**

Hyperlinks can be used to link to confidential documents, email addresses, file shares, or intranet addresses.

Note: Custom hyperlinks are distinct from system-generated hyperlinks used to build and maintain a document's table of contents, index, and table of authorities.

- **Ink Annotations – MS Word (when used with a Tablet PC)**

Ink annotations are freehand annotations made to a document on a Tablet PC.

- **Macros – MS Office**

Word users can automate repeated tasks using macros. A macro is a series of commands and instructions that are grouped together as a single command to accomplish a task automatically.

- **Markup – PDF**

Markup is a tool used to make comments and annotations to PDF documents.

- **Presentation Tags – MS PowerPoint**

Presentation tags are a feature of Microsoft PowerPoint (accessed using VBA) that allows custom information to be associated with objects in the presentation.

- **Previous Authors – MS Word**

Previous author information is information about all authors who have previously saved the document as well as save locations.

- **Redacted Text – MS Word & Excel**

Redacted text is where the font and background color are the same or nearly the same. When the font and background color match exactly, the text is invisible when the document is viewed or printed. Backgrounds include highlighting; as well as text, cell, and textbox shading.

- **Routing Slip – MS Word & Excel**

Routing slips are used to create a distribution list of reviewers in a particular order. Routing slips are manually created by adding in recipients' email addresses. When a file is routed, its routing slip is sent as an email attachment.

- **Slide Tags – MS PowerPoint**

Slide tags are a feature of Microsoft PowerPoint (accessed using VBA) that allows custom information to be associated with objects in the presentation.

- **Small Text – MS Office**

Any text block contained in a document that is smaller than 5 points (i.e. 4pts and less) is considered small text. The text is so small that it will not be visible when viewed or printed and can be used to hide information in a document.

- **Smart Tags – MS Word**

Smart tags are used to identify and provide context for particular text in a document (such as a person's name), and allow you to perform certain actions when you select the text.

- **Speaker Notes – MS PowerPoint**

Speaker notes are notes added to presentation slides as a reference for the presenter. They are an area of a presentation or slide that is hidden during the presentation and is reserved for notes for the speaker.

- **Template – MS Office**

Microsoft Word ships with templates for many common business documents. NORMAL.DOT is the default template for Word 97 through Word 2003 and NORMAL.DOTX is the default template for Word 2007.

- **Track Changes – MS Word & Excel**

Track changes enable you to monitor who adds and deletes what from a document.

- **Track Change Authors – MS Word & Excel**

The track change author is the user who makes changes to a document.

- **Unused Masters – MS PowerPoint**

Unused masters are unused master slides.

- **Versions – MS Word**

Some versions of Microsoft Word record the number of times a document has been versioned over its lifetime. This function enables Microsoft Word to save prior versions of a document as a part of the electronic file.

- **Watermarks – MS Word**

Watermarks are text or pictures that appear behind document text. They often add interest or identify the document status, such as marking a document as a "Draft."

- **White Text – MS Word & Excel**

White text is text formatted as white on a background that is formatted as white. White text is text that has been formatted with a font color of white and has no background color.

- **Worksheet Properties – MS Excel**

Worksheet properties are details about a spreadsheet that help identify it. They are added using VBA.

WORKSHARE PROTECT CLIENT

Your administrator may have configured Workshare Protect Server to skip cleaning of emails that have been processed by the Workshare Protect client. This means that if you have the Workshare Protect client installed on your desktop and the client is checking your emails for metadata, then your emails will not be cleaned again by Workshare Protect Server.

If your administrator has not configured Workshare Protect Server in this way, then Workshare Protect Server will clean all emails even those that have already been cleaned by the Workshare Protect client.

Payne Metadata Assistant

Your administrator may have configured Workshare Protect Server to skip cleaning of emails that have been processed by Payne Metadata Assistant. This means that if you have Payne Metadata Assistant installed on your desktop checking your emails for metadata, then your emails will not be cleaned again by Workshare Protect Server.

CHAPTER 2. INTERACTING WITH WORKSHARE PROTECT SERVER

This chapter describes how you may interact with Workshare Protect Server. It includes the following sections:

- **Specifying Cleaning and PDF Conversion**, page 14, describes how you use profiles to specify cleaning and conversion requirements for attachments.
- **Overriding Processing**, page 16, describes how you can skip processing of a particular email.
- **Previewing Processed Email Attachments**, page 16, describes how you can preview what your attachments will look like once processed (cleaned or converted).
- **Receiving Bounced Emails**, page 17, describes how emails with attachments that cannot be processed may be bounced back to you without being delivered.
- **Receiving Clean Receipts**, page 17, describes how you can receive cleaning reports each time one of your emails has been cleaned by Workshare Protect Server.
- **Reviewing Message Logs**, page 18, describes how you can search through and view emails that you have sent through Workshare Protect Server.

SPECIFYING CLEANING AND PDF CONVERSION

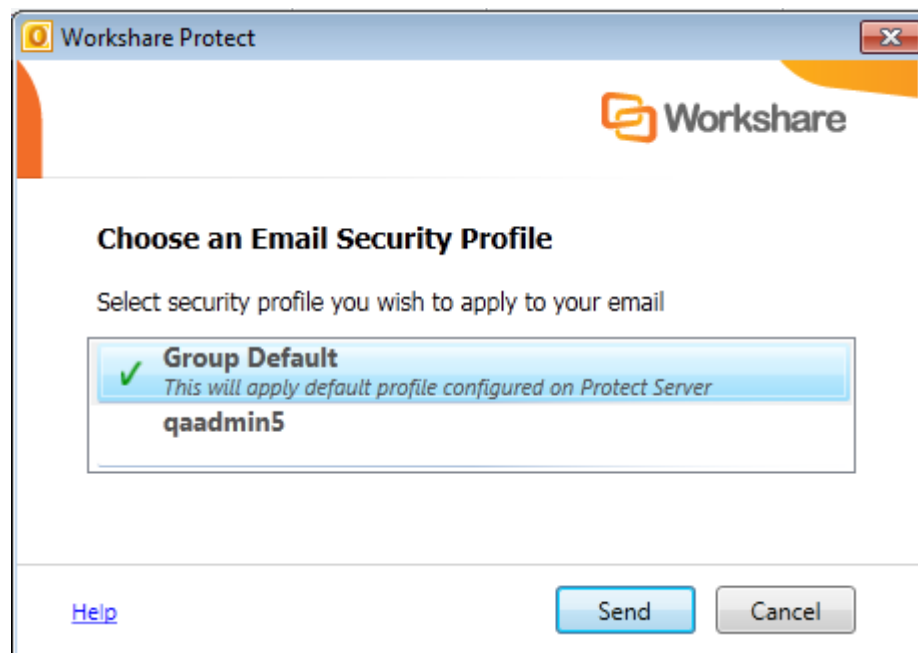
Workshare Protect Server processes emails according to profiles. A profile is a collection of metadata and PDF conversion settings – a set of instructions to Workshare Protect Server as to what metadata to remove from an email attachment and whether to convert the attachment to PDF.

Metadata settings and PDF instructions are specified per file type – Microsoft Word documents, Excel spreadsheets and PowerPoint presentations as well as PDF files. So for example, a profile could specify that comments and hidden text should be removed from Microsoft Word attachments and the document should be converted to PDF and only hidden worksheets should be removed from Microsoft Excel attachments and they should not be converted to PDF.

Every profile has an email address and this is how Workshare Protect Server determines which profile to apply to any given email.

Selecting Profiles with Workshare Protect Server Client Installed

When Workshare Protect Server Client is installed and you are sending an email with an attachment to an external recipient, the following dialog is displayed when you click Send.



You simply select the profile to apply to your email from the list displayed and click **Send**.

Your administrator defines the profiles in the Workshare Protect Server web console. The administrator may have defined an override profile which you can select in order to bypass the cleaning and conversion actions on Workshare Protect Server. If you have any questions or requirements regarding the profiles, contact your administrator.

Selecting Profiles without Workshare Protect Server Client

You simply add the email address of a profile as a recipient in your email (in the **Cc..** field or the **To..** field) and Workshare Protect Server will apply this profile when processing the email.

Warning: Do not add the profile email address to the **Bcc..** field.

If you do not specify a profile email address in your email and your administrator has enabled the Active Directory cache feature, then Workshare Protect Server will look to see what AD group you belong to and apply whichever profile your administrator has defined for that group. If no profile has been defined for your group, then Workshare Protect Server will apply whichever profile your administrator has defined as the Default profile.

If you do not specify a profile email address in your email and your administrator has NOT enabled the Active Directory cache feature, then Workshare Protect Server will apply whichever profile your administrator has defined as the Default profile.

If you specify more than one profile email address in your email then Workshare Protect Server will apply whichever profile your administrator has defined as the Fallback profile.

Note: The cleaning override email address will always take precedence over any profile email address. So when the cleaning override email address is specified, even if a profile email address is also specified, Workshare Protect Server will always skip processing.

The effect of using profile email addresses is as follows:

Emails with the override email address in a recipient field	All emails and their attachments are sent directly to all recipients.
Emails with a profile email address in a recipient field	Emails to internal recipients are sent immediately. Emails to external recipients are first processed by Workshare Protect Server and any attachments will be cleaned of metadata or converted (according to the profile) before the email is sent to the external recipients.

Emails with no profile email address in a recipient field

Emails to internal recipients are sent immediately. Emails to external recipients are first processed by Workshare Protect Server and any attachments will be cleaned of metadata or converted (according to the profile defined for the sender's group and if no group profile is defined then according to the default profile) before the email is sent to the external recipients.

Emails with more than one profile email address in a recipient field

Emails to internal recipients are sent immediately. Emails to external recipients are first processed by Workshare Protect Server and any attachments will be cleaned of metadata or converted (according to the fallback profile) before the email is sent to the external recipients.

OVERRIDING PROCESSING

Your administrator may have configured an override email address which can be used to bypass the cleaning and conversion actions on Workshare Protect Server. In order to send an email which will not be cleaned/converted by Workshare Protect Server, you must enter this override email address in the **CC** field of your email.

The effect of the email override address is as follows:

Emails with the override email address in the **CC** field

All emails and their attachments are sent directly to all recipients.

Emails without the override email address in the **CC** field

Emails to internal recipients are sent immediately. Emails to external recipients are first processed by Workshare Protect Server and any attachments will be cleaned of metadata or converted (according to profile) before the email is sent to the external recipients.

Contact your administrator to find out your override email address.

PREVIEWING PROCESSED EMAIL ATTACHMENTS

Workshare Protect Server can provide a preview of what your attachments will look like once processed (cleaned or converted).

In order to request a preview of what the processed attachments will look like before sending them to your recipients, send the email to a profile email address only. Workshare Protect Server will treat such an email as a preview request and send the processed attachments back to you.

RECEIVING BOUNCED EMAILS

Your administrator may have configured Workshare Protect Server to prevent emails with attachments that include comments or track changes or that cannot be processed from being delivered. When Workshare Protect Server is configured this way, it bounces the email back to you with a non-delivery email. There are several reasons why Workshare Protect Server may bounce an email and the reason is outlined in the non-delivery email.

- Attachment may include comments or track changes metadata. This is to encourage you to carefully consider files with comments or track changes before sending them externally.
- Attachment cannot be processed. The processing failure categories are as follows:
 - Corrupt attachment
 - Digitally signed attachment
 - Digitally signed email
 - Document format not supported
 - Password-protected or encrypted attachment
 - Processing error

The non-delivery email will also recommend a course of action for you to take, such as replacing attachments.

Your original email may be attached to the non-delivery email.

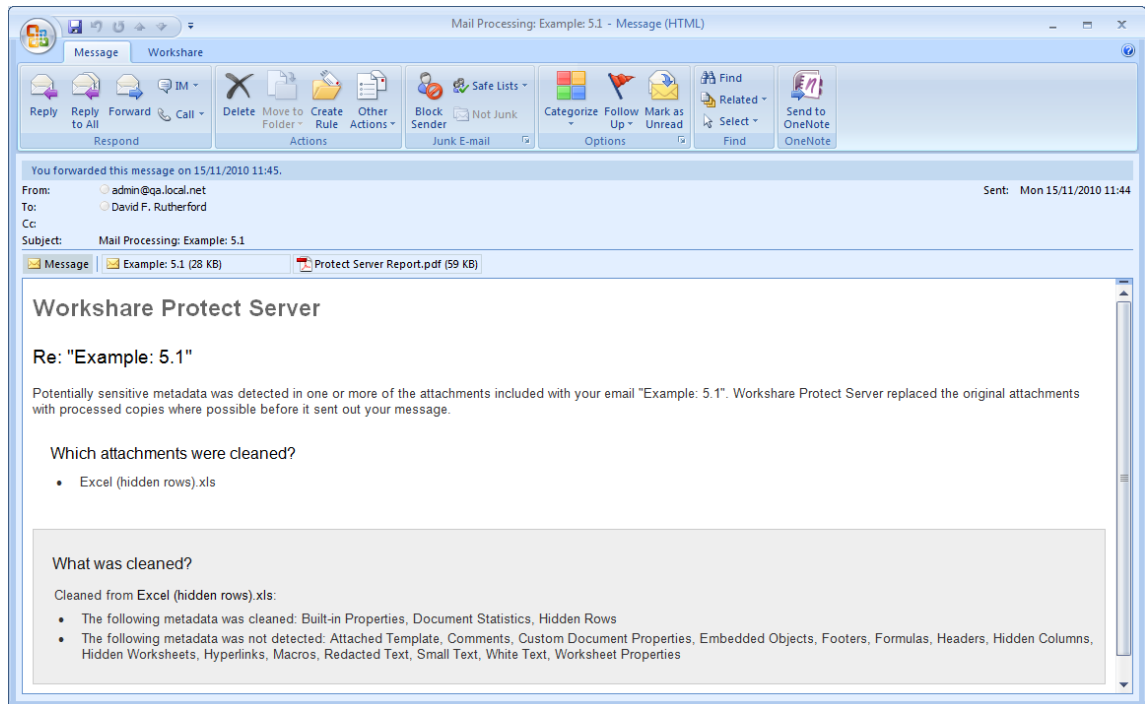
When you receive a non-delivery email with notifications that Workshare Protect Server has found comments or track changes in the attachments or cannot process the attachments, you have the following options:

- **Send without processing:** Resend the email from your Sent folder with the override email address as well as the original recipients – this bypasses Workshare Protect Server processing.
- **Fix issue.** Create a new email with updated attachments and send.

RECEIVING CLEAN RECEIPTS

Your administrator may have configured Workshare Protect Server to send a clean receipt email after processing. A clean receipt email describes what processing has been performed on your email attachments (cleaned/converted) and includes a summary of any metadata removed. The clean receipt email also includes a Clean Report as an attachment. The Clean Report is a PDF that provides details of the exact metadata cleaned from the file you attached to your email.

The clean receipt email can also include your original email (with its attachments processed). Administrators configure clean receipts on the Workshare Protect Server web console.



Both the clean receipt email and the Clean Report show details of what was cleaned from an attachment. However, where the clean receipt email may report that 5 comments and 10 custom properties were cleaned, the Clean Report provides detailed information on the actual content of the metadata removed. For example, the text of comments or the content of custom properties.

Additionally, where you send emails with attachments to internal and external recipients, the internal recipients can also receive a clean receipt email with the processed attachments. This is to ensure that internal recipients always have access to the same version of attachments that are received by external recipients. This will only occur if your administrator has configured it on the Workshare Protect Server web console.

REVIEWING MESSAGE LOGS

This functionality is available for Business and User Role users.

Message logs provide information about all the emails processed by Workshare Protect Server. The message logs can be searched and accessed through the **Messages** tab of the Workshare Protect Server web console.

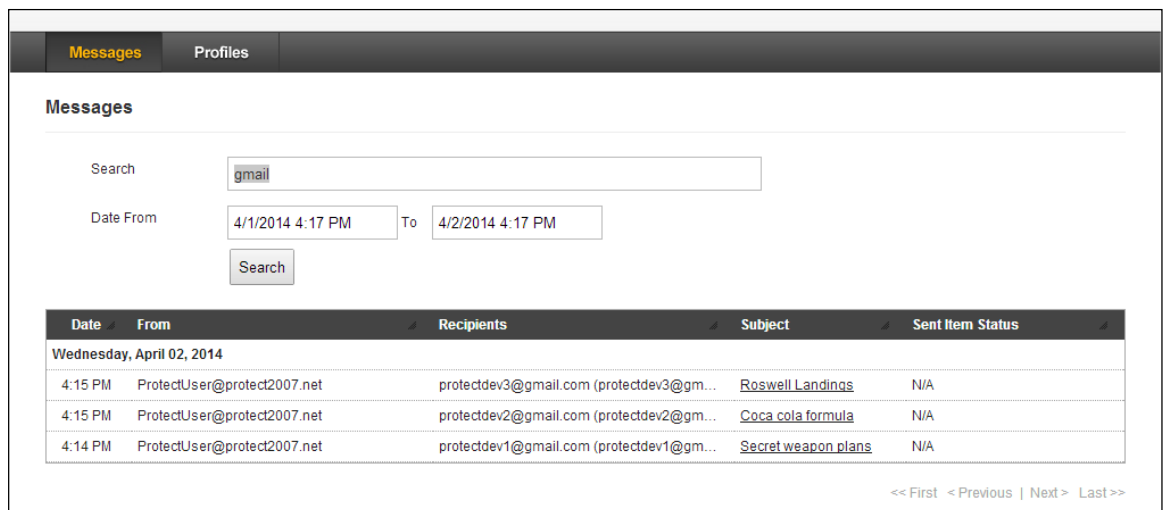
Business and User Role users can search through and view emails that they themselves have sent through Workshare Protect Server. They cannot search or view emails sent by other users.

To search message logs:

1. Log into the Workshare Protect Server web console.
2. Select **Messages**.
3. In the **Search** field, enter your search criteria. Workshare Protect Server searches for the keyword(s) in the senders/recipients names, subject, attachment names and metadata item name.

Note: Use double quotes (“”) around attachment names and sender/recipients in order for the search not to break up the terms between periods (.) or the @ sign.

4. Specify a date range if required.
5. Click **Search**. The emails that you have sent through Workshare Protect Server and match your search criteria are displayed.



Messages

Search:

Date From: To:

Date	From	Recipients	Subject	Sent Item Status
Wednesday, April 02, 2014				
4:15 PM	ProtectUser@protect2007.net	protectdev3@gmail.com (protectdev3@gm...	<u>Roswell Landings</u>	N/A
4:15 PM	ProtectUser@protect2007.net	protectdev2@gmail.com (protectdev2@gm...	<u>Coca cola formula</u>	N/A
4:14 PM	ProtectUser@protect2007.net	protectdev1@gmail.com (protectdev1@gm...	<u>Secret weapon plans</u>	N/A

<< First < Previous | Next > Last >>

Tip! To display all your emails that have passed through Workshare Protect Server, leave the Search field blank and click Search.

For each email the following information is provided:

- Date** The date the email was sent.
- From** The email address of the sender of the email (your email address).
- Recipients** The email address(es) of the recipient(s) of the email.
- Subject** The subject matter of the email, as entered in the **Subject** field.
- Sent Item Status** The synchronization status. The status can be:
 - Updated:** Email in Sent items updated with processed email.
 - Pending:** Waiting to update email in Sent items with processed email.

Error: Pending Retry: Error when trying to update email in Sent items with processed email, waiting to retry update.

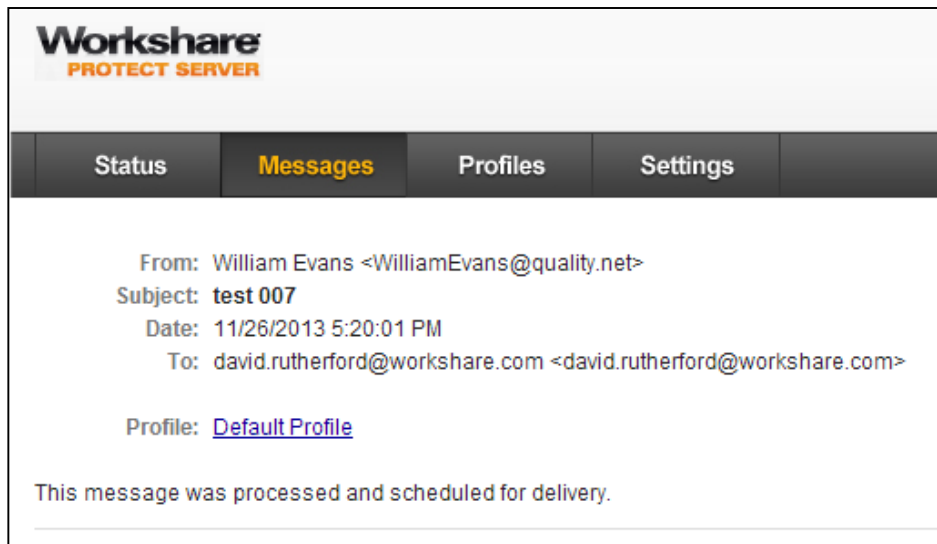
Failed (receipt sent): Failed to update email in Sent items with processed email, clean receipt sent to sender.

Failed (email copied): Failed to update email in Sent items with processed email, a copy of the processed email added to Sent items folder.

Failed: Failed to update email in Sent items with processed email.

N/A: Synchronization not enabled.

Click the **Subject** of an email to display further details. For example:



The screenshot shows the Workshare Protect Server web console interface. At the top, the logo "Workshare PROTECT SERVER" is displayed. Below the logo is a navigation bar with four tabs: "Status", "Messages" (which is highlighted in yellow), "Profiles", and "Settings". The main content area displays the details of an email message:

From: William Evans <WilliamEvans@quality.net>
Subject: test 007
Date: 11/26/2013 5:20:01 PM
To: david.rutherford@workshare.com <david.rutherford@workshare.com>

Profile: [Default Profile](#)

This message was processed and scheduled for delivery.

You can now see which profile was applied to the email attachment and if your administrator has configured Workshare Protect Server to store a copy of the cleaned message in the database, you can also download the processed attachment if required. Click the profile link to view the properties of the profile in the **Profiles** tab of the Workshare Protect Server web console.

CHAPTER 3. WORKSHARE PROTECT SERVER REPORTS

This chapter describes the reports provided by Workshare Protect Server. It includes the following section:

- **Generating Reports**, page 22, describes the different reports available to Workshare Protect Server Business Role users.

This functionality is available for Business Role users only.

GENERATING REPORTS

The **Reports** tab of the Workshare Protect Server web console includes information about the profiles used to process emails, the metadata removed by Workshare Protect Server, the file formats processed as well as any exception attachments that were not processed.

Data can be viewed from the current day, the past week, month or year, or all data.

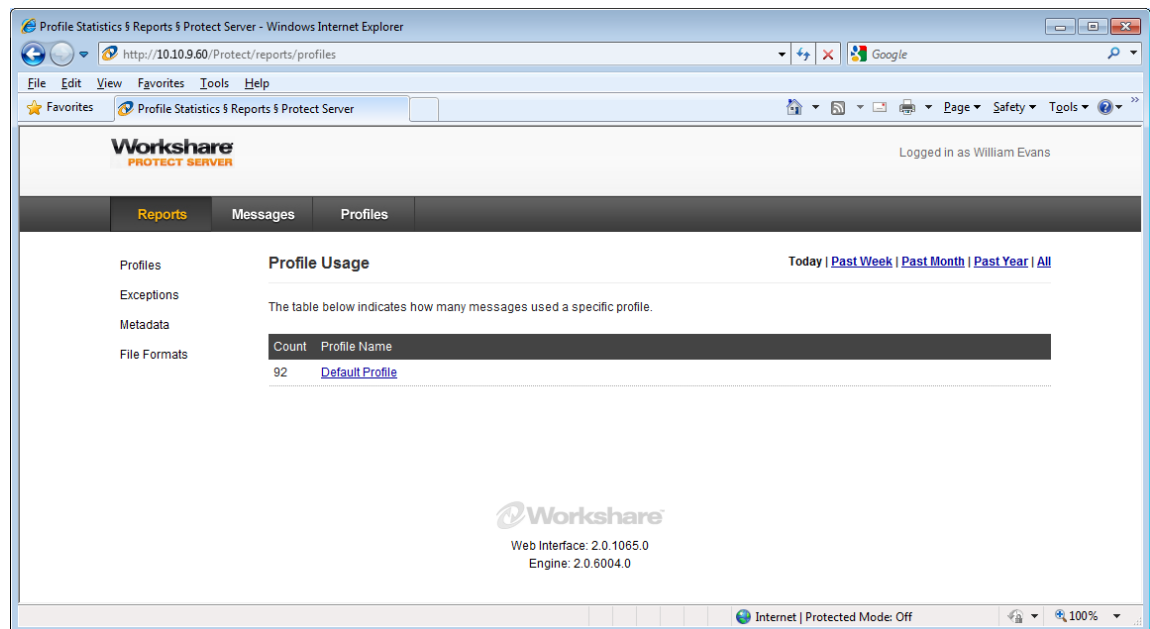
To view reports:

1. Log into the Workshare Protect Server web console as a Business Role user.
2. Select **Reports**.
3. Select a report type to view – **Profiles, Exceptions, Metadata or File Formats**.
4. Click the time period for which you want to view data – **Today, Past Week, Past Month, Past Year, All**.

The selected report is displayed. The different report types are described in the following sections.

Profile Usage

The Profile Usage report displays how many emails were processed using each profile.



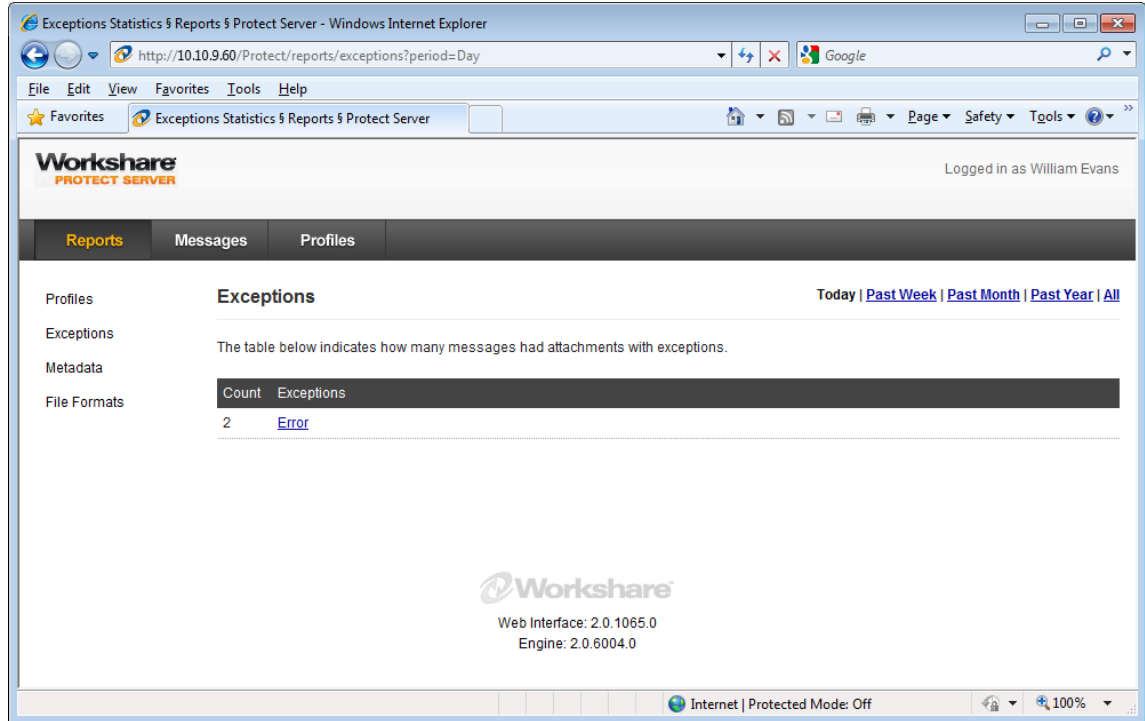
The report shows the following information:

- Count** The number of emails processed.
- Profile Name** The profile Workshare Protect Server used to process an email.

Click a profile name to display the properties of that profile in the **Profiles** tab.

Exceptions

The Exceptions report displays how many emails had attachments that could not be processed by Workshare Protect Server.



The report shows the following information:

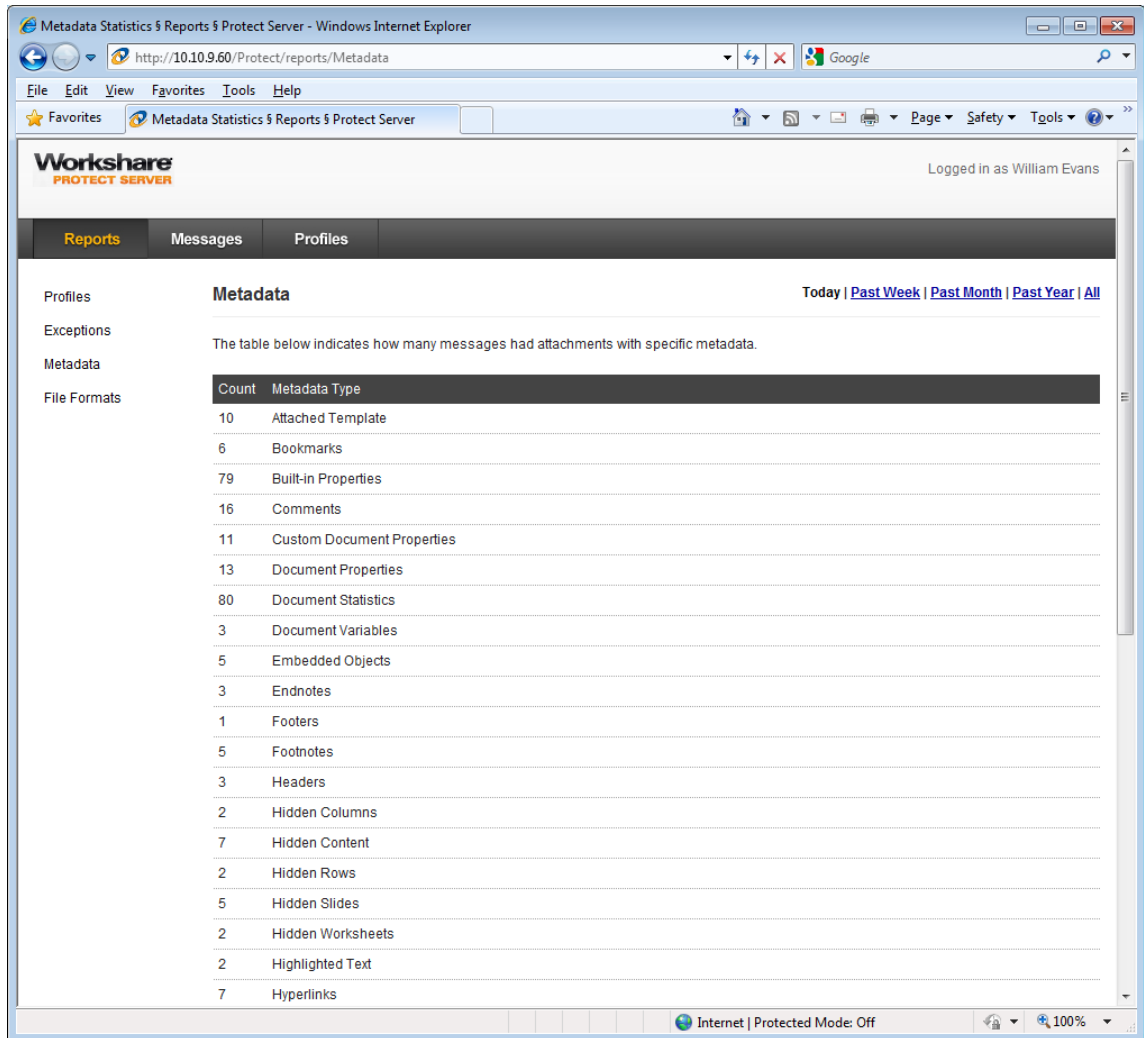
- Count** The number of emails processed.
- Exceptions** The reason that the attachment could not be processed. The possible reasons are as follows:
 - Corrupt attachment
 - Digitally signed attachment
 - Digitally signed email
 - Document format not supported
 - Password protected or encrypted attachment
 - Processing error

Click an exception type to display the emails with attachments that fell into that exception in the **Messages** tab.

Note: The report will show all emails that triggered exceptions although as a Business Role user, you will only be able to see the details of your own email messages. So when you click an exception type, you will only see the exception emails that you sent that could not be processed by Workshare Protect Server and not exception emails sent by other users.

Metadata

The Metadata report displays how many emails attachments were cleaned for each metadata type.



Workshare PROTECT SERVER
Logged in as William Evans

Reports Messages Profiles

Profiles
Exceptions
Metadata
File Formats

Metadata [Today](#) | [Past Week](#) | [Past Month](#) | [Past Year](#) | [All](#)

The table below indicates how many messages had attachments with specific metadata.

Count	Metadata Type
10	Attached Template
6	Bookmarks
79	Built-in Properties
16	Comments
11	Custom Document Properties
13	Document Properties
80	Document Statistics
3	Document Variables
5	Embedded Objects
3	Endnotes
1	Footers
5	Footnotes
3	Headers
2	Hidden Columns
7	Hidden Content
2	Hidden Rows
5	Hidden Slides
2	Hidden Worksheets
2	Highlighted Text
7	Hyperlinks

Internet | Protected Mode: Off | 100%

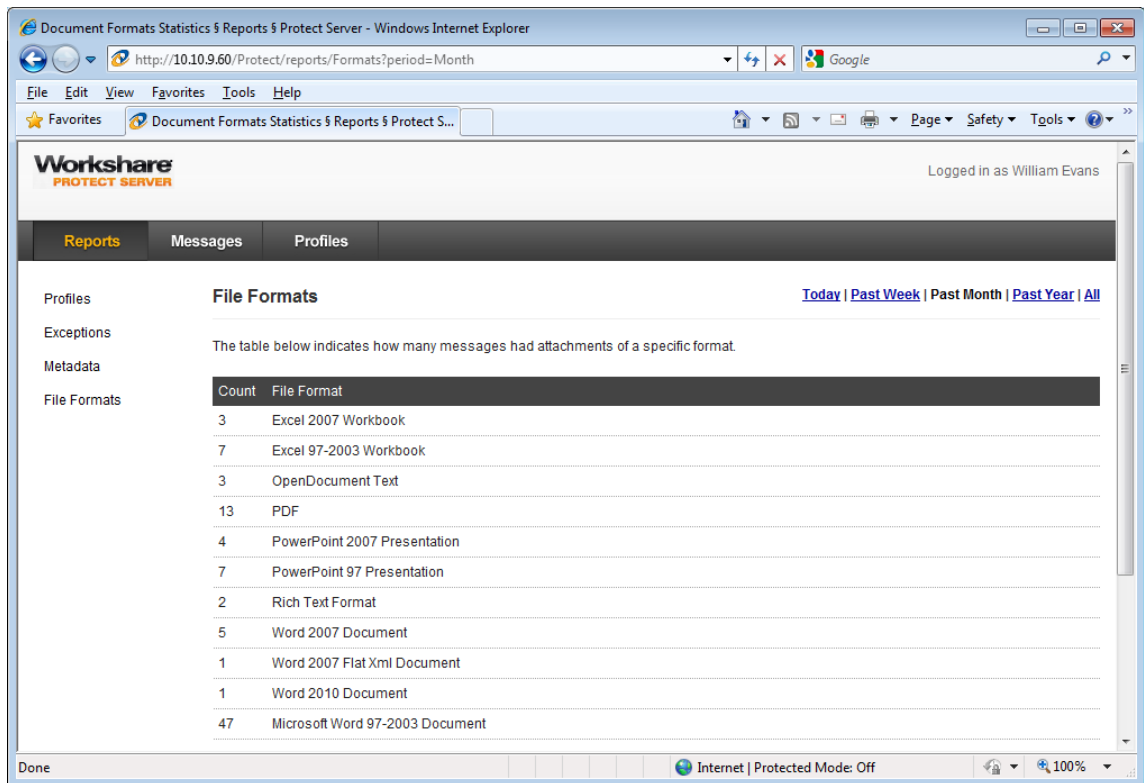
The report shows the following information:

Count The number of emails processed.

Metadata Type The metadata type Workshare Protect Server cleaned from an email attachment.

File Formats

The File Formats report displays how many emails had attachments of a specific format.



Document Formats Statistics & Reports & Protect Server - Windows Internet Explorer
 http://10.10.9.60/Protect/reports/Formats?period=Month
 Logged in as William Evans

File Formats [Today](#) | [Past Week](#) | [Past Month](#) | [Past Year](#) | [All](#)

The table below indicates how many messages had attachments of a specific format.

Count	File Format
3	Excel 2007 Workbook
7	Excel 97-2003 Workbook
3	OpenDocument Text
13	PDF
4	PowerPoint 2007 Presentation
7	PowerPoint 97 Presentation
2	Rich Text Format
5	Word 2007 Document
1	Word 2007 Flat Xml Document
1	Word 2010 Document
47	Microsoft Word 97-2003 Document

The report shows the following information:

- Count** The number of emails.
- File Format** The file format of the email