

# Workshare Protect Server

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## Release Notes

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## Introduction

Workshare Protect Server provides server-side metadata cleaning and document processing. Protect Server processes all emails passing through the corporate mail server, including those that originate from webmail and mobile mail clients. In corporate email scenarios, email is always routed through the corporate email server - and consequently Protect Server - ensuring complete protection. By locating this processing effort on the server, email send performance on the originating device is not impacted, and users are not affected.

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.

Additionally, Protect Server can include the Policy Editor which provides a new policy framework to determine whether an email should be sent or bounced. It provides for control at the matter level through policies that associate email whitelists with matter-IDs.

## 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 2016 Standard/Datacenter x64 Edition (recommended)
- Microsoft Windows Server 2012 R2 Standard/Datacenter x64 Edition

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

## Certified email systems

Protect Server is certified with Microsoft Exchange 2010, 2013 and 2016.

## Prerequisites

The following software must be installed prior to the installation of Protect Server. The first three are installed automatically by running the scripts provided by Workshare, described in the *Workshare Protect Server Installation guide*.

- Application Server and Web Server (IIS) Roles configured on Microsoft Windows Server.
- Microsoft IIS (Internet Information Services) 7.5, 8.0 or 8.5 with virtual SMTP service installed
- Microsoft Message Queue
- Microsoft SQL Server 2012, 2014 or 2016 with Full Text Search

**Note:** *If Protect Server is to be configured to run with a remote SQL database, ensure that both machines (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 Protect Server by the Workshare.ProtectServer.InstallWizard.exe.

- Microsoft .NET Framework 4.5.2 or higher
- Windows Visual C++ 2008 SP1 Redistributable Package (x86/x64)
- Windows Visual C++ 2005 SP1 Redistributable Package (x86/x64)
- Microsoft SQL Server Compact 4.0 (x64)
- IIS URL Rewrite Module 2

## Virtual environments

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

## Database implications

Assuming that no emails are stored in the database and that on average an email has one attachment, the following guidelines apply:

- Sending 10,000 emails a day and assuming 15% of those emails include metadata will add approximately 5.3MB of data to your database per day.
- Sending 50,000 emails a day and assuming 15% of those emails include metadata will add approximately 26.94MB of data to your database per day.
- Sending 100,000 emails a day and assuming 15% of those emails include metadata will add approximately 53.89MB of data to your database per day.
- Sending 250,000 emails a day and assuming 15% of those emails include metadata will add approximately 134.72MB of data to your database per day.

## Pre-deployment checklist

Refer to Appendix D of the *Workshare Protect Server Installation guide* for a pre-deployment checklist that you can complete, print out and reference during the installation.

## Upgrading Workshare Protect Server

The latest version of Protect Server supports upgrades from previous versions back to Protect Server 3.6. The upgrade process is automatic and running the new Protect Server installation file will automatically uninstall the previous installation before running the new Protect Server installer. The uninstall will preserve the Protect Server database and once the new Protect Server 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 machine as a DOMAIN user who:

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

## Protect Portal

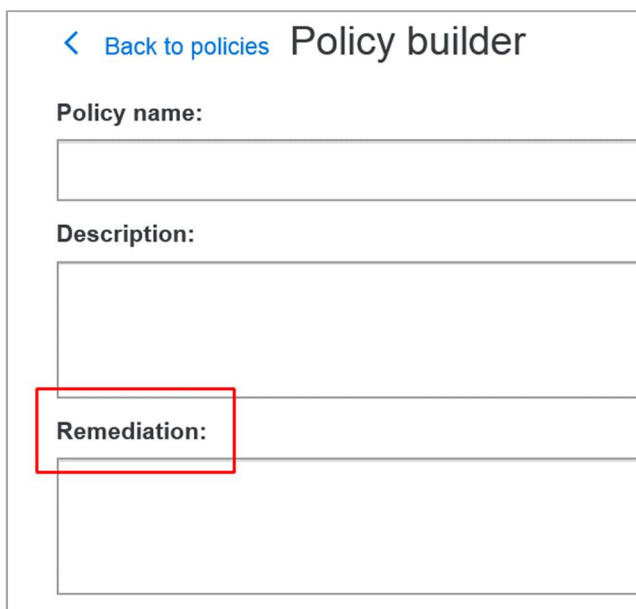
The version of Protect Portal included in the 3.11 release has been upgraded to 4.1. It is recommended that when upgrading to 3.11, the Protect Portal is also upgraded to 4.1.

## What's New in this Release

Workshare Protect Server 3.11 includes the following new features:

### Useful advice included in notification email

The notification emails sent to users when their email has been blocked includes advice as to what they can do. This is fully configurable when defining a policy. The admin enters relevant information in the new **Remediation** field and this information is displayed to the user in the notification email they receive when an email has been blocked by the policy.



The screenshot shows the 'Policy builder' interface. At the top left, there is a blue back arrow and the text 'Back to policies'. The title 'Policy builder' is on the top right. Below the title, there are three input fields: 'Policy name:', 'Description:', and 'Remediation:'. The 'Remediation:' field is highlighted with a red rectangular box.

### Added support for Windows Server 2016

Protect Server 3.11 supports Windows Server 2016, both the Standard and the Datacenter editions.

**Note:** *Windows Server 2008 is no longer supported.*

## Fixed Issues

The following issue has been fixed in Workshare Protect Server 3.11:

Ref	Details
PS-232	Badmail folder with .BAD files ballooning in size when cleaning a 7.7MB RTF file.

## Known Issues

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

ID	Details
PS-413	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.
PS-412	After cleaning a POT file, a table may be converted to a picture in the cleaned file.
PS-414	After cleaning a PPT file created using right-click 'Save As', the cleaned file fails to open.
PS-415	After converting a PPTX file with a Pushpin theme, the resulting PDF file may be corrupted.
PS-416	After converting a PPTX file that contains content controls, the content controls are lost in the resulting PDF file.
PS-417	After converting a POTX file that contains charts, the charts are lost in the resulting PDF file.
PS-61	Bounce: When a profile address or override address is used in an email, it is shown in the <b>Recipients</b> column in the <b>Messages</b> tab of the web console.
PS-63	Protect Portal: PDFs encrypted with "master" password and AES256 encryption cannot be cleaned.
PS-64	Protect Portal: Protect does not inherit "Encrypt all document except Metadata" and "Encrypt File Attachments only" Acrobat DC settings.
PS-65	Protect Portal: PDFs encrypted with "Encrypt File Attachments only" and AES128bit encryption cannot be cleaned.

ID	Details
<b>PS-359</b>	Attachments are unexpectedly cleaned/not cleaned when a protected sender sends on behalf of someone else or another user sends on behalf of a protected sender.
<b>PS-358</b>	When the Protect Routing Agent is installed, attachments are unexpectedly cleaned/not cleaned when a "test sender email" sender sends on behalf of someone else or another user sends on behalf of a "test sender email".
<b>PS-357</b>	Clean summaries or bounce emails are delivered to users who are only sending emails on behalf of others (using send as and send on behalf of delegate access).
<b>PS-356</b>	When sending emails on behalf of others, the AD cache profile is triggered instead of the default profile when email is sent from a user who is not configured in an AD cache group.
<b>PS-329</b>	An 'installer check – pre-requisite failed' error is shown when trying to install Protect Server 3.10 on a previous Protect Server 3.9 in Azure installation.
<b>PS-308</b>	An 'unable to install package...' error is shown and installation fails when trying to install Protect Server 3.10 on a previous Protect Server 3.9 in Azure installation.
<b>PS-286</b>	After providing an answer file, the values in it are not reflected in the Routing Agent server configuration page.
<b>PS-181</b>	When the selected date format is "mm/dd/yyyy" in the date fields of Document statistics settings, the date format is still being considered as "dd/mm/yyyy".
<b>PS-156</b>	Success message is showing in AD cache after saving, even if invalid Active Directory Cache Credentials are entered (or the fields are left blank).
<b>PS-155</b>	After deselecting the 'Enable Active Directory-based default profile selection' checkbox (AD Cache settings) and clicking 'Save Changes', an error message is shown.

## Contact Info

For technical help and support on Workshare products, contact Workshare Customer Support:  
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