Workshare Professional 10.3

User Guide

Table of Contents

Chapter 1: Introducing Workshare Professional

This chapter introduces Workshare Professional, 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 Professional?**, page 11, introduces Workshare Professional.
- **Workshare Professional Functionality**, page 12, describes the different areas of functionality of Professional.
- **Accessing Professional Functionality**, page 17, describes how to access Professional functionality after install.
- **Licensing**, page 19, describes how to license Professional after install.

What is Workshare Professional?

Workshare Professional reimagines multi-party review and collaboration and ensures the safe and accurate exchange of information, enabling the collaborative evolution of high value business documents.

Workshare Professional is a desktop application that automates managing changes to business documents, protects against unauthorized content disclosure and delivers the world's most secure PDF creation, all in one integrated solution.

Key features of Workshare Professional include:

- Comparison of Word, PowerPoint, Excel and PDF files, including image-based PDF files
- Comparison of selected pieces of content, such as a single paragraph or clause
- Ability to accept/reject changes in a comparison and then create new documents
- Advanced comparison features including one-to-many comparisons (Word and PDF files), version comparisons, and access from within Office and Document Management Systems
- Access to comparison functionality from within Outlook as well as right-click access from within individual emails
- Conversion from PDF to DOC format for local files and from within the DMS/CRM
- Advanced, interactive metadata cleaning/PDF creation/secure file transfer for attachments in Outlook
- Comprehensive content risk protection enabling the discovery and removal of hidden sensitive data as well as visible sensitive data
- Options to save and share Office documents to Workshare online
- Access and visibility into online collaborative workspaces directly from Office
- Secure file sharing from all devices and browsers with metadata removal and end-to-end encryption
- Centralized policy design and enforcement administrator tools
- ECM/DMS and OCR integration with desktop comparison features
- Centralized user account management and control
- Complete access to Workshare online functionality to share and collaborate on documents, including setting folder access and permissions, positional commenting and reviewer communications with presence indicators
- Desktop sync app to synchronize your online content to your local desktop

> ***Note***: *Workshare Professional can be installed without Microsoft Office integration. In this case, the comparison functionality is available from the Workshare comparison applications and the metadata removal functionality is available when sending emails.*

Workshare Professional Functionality

Workshare Professional provides sophisticated functionality that is convenient and accessible, enabling users to move smoothly between tasks and work rapidly to manage changes. Workshare Professional assists you throughout the complete document lifecycle – from document assembly, review, verification and security. Workshare Professional has also made key functionality of the DMS available, for example, enabling the comparison of DMS versions.

Workshare Professional includes file comparison, file and metadata security and file share and sync.

File comparison

Workshare Compare reinvents multi-party review by helping users understand, communicate and implement changes more quickly and accurately. 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.

See the changes

With Microsoft Word and PDF files, users can perform one-to-one and one-to many comparisons and see accurate DeltaView redlines in individual tabs. Compare compares both regular text-based PDF files and image-based PDF files that originate from scanned documents, automatically applying OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text. Compare provides access to files and version information stored in a DMS/CRM or SharePoint and users can browse for files to compare as well as save comparisons into the DMS/CRM or SharePoint.

Users can launch Compare from the environment that suits them:

- Launch a comparison of an attachment directly from an email message
- Launch a comparison from within Word, Excel or PowerPoint
- Launch a comparison from within a DMS/CRM or SharePoint

Selective Compare enables the user to copy snippets of text from anywhere and run a comparison in Workshare. This is much faster and more focused than comparing an entire document.

Understand the changes

Compare provides an intuitive interface that enables users to navigate easily between changes. Category View divides changes according to type, for example, numbering changes, punctuation changes or matching changes, enabling users to quickly focus on the changes that are important to them.

Implement the changes

When comparing Word and PDF files, Compare includes the ability to accept and reject changes (individually or as a group) and create a new Word document that includes all the changes.

File and metadata security

Workshare Protect provides content risk protection through comprehensive cleaning of metadata and conversion to secure PDF.

Protect enables the discovery and removal of hidden sensitive data as well visible sensitive data. Hidden sensitive data may include information such as track changes, author's name, server names, keywords, routing slips and authoring trails.

On your desktop

Protect integrates with Office providing an option to display a comprehensive report of all the content risk in a document while it is open in Microsoft Word, Excel and PowerPoint. Content risk is displayed according to its risk level (high, medium, low). After discovery, users can remove selected metadata.

Protect quickly and securely converts Office documents into PDF or PDF/A files. Users can access PDF conversion functionality from within Word, Excel and PowerPoint or by right-clicking closed Office files from the desktop and from within a DMS/CRM or SharePoint. Additionally, users can combine multiple files into a single PDF – a useful tool at the close of a project or when creating a report that involves documents, spreadsheets and graphics.

Within email

Protect can be configured to support the way you work.

Interactive Protect offers options to control documents and secure attachments before sending email. It simplifies metadata cleaning, avoids email pop-ups, and eliminates Outlook add-in issues. Protect scans documents as soon as they are added as attachments to an email. Users are made aware of the risk involved and given the option to make informed decisions before clicking Send. From the Interactive Protect panel users can clean metadata from attachments, convert attachments to PDF or PDF/A, and compress attachments into one zip file. Additionally, users can securely transfer attachments to a secure location in Workshare online and send recipients a link to that location.

In other configurations, Protect prevents users from accidentally emailing confidential information by alerting users before the email is sent when an email or its attachment breaches security policies. Depending on the actions defined for policy breaches, emails may be blocked or sensitive data removed. Security policies can specify different actions when a document is sent internally or externally. For example, it may not be acceptable for hidden server names and user details to be included in documents sent externally, but it may be fine to leave those details in documents sent within an organization. Protect comes with a pre-defined default security profile (collection of policies).

File share and sync

Workshare's online services provide a secure file sharing and online collaboration tool that enables users to store, share, and collaborate on content. There are several ways of interacting with the online services offered by Workshare, either online through a web browser or using special apps. The Workshare desktop app is the app for use on PCs and it is installed as part of the Professional installation when you select the file share & sync option.

Note: Workshare's mobile apps are apps designed for use on smartphones and tablets that provide access to documents in Workshare online while on the move.

Users can sync documents safely across all their devices automatically updating content between Workshare online and their desktop and mobile devices.

With the Groups functionality, users can easily organize and manage files and projects, ensuring the correct users and permissions are set up for a group. Tools for commenting, annotating, and file comparison are available to support all stages of document evolution. Users receive updates when files in particular groups are being accessed, commented on, or modified by other reviewers, so ideas and conversations are never missed. Once new file versions are uploaded, users can compare old and new versions to see at a glance what has changed.

Users can access, review, and collaborate on files from any device, supporting company-wide mobility initiatives. Users can also select files to save for offline access, enabling users to work on files without Internet access. Once the device is connected again, all updates are synced back as a new version.

IT security controls are available at an account level, allowing data governance regulations to be met, and reduce the risk of accidental data loss. For added security, organizations can choose where their corporate data is stored (public cloud, custom public cloud, or hybrid). Finally, Workshare online can be integrated with existing DMS to securely mobilize content, and get the most out of IT system investments.

With Professional, users can save and share redlines or Office files (directly from Compare or Office) to Workshare online so they can access them on their other devices and on the move. Once shared, users can see their shared document, spreadsheet or presentation come alive and understand who's reviewing it online - directly from Word, Excel or PowerPoint.

DMS/CRM integration

Workshare Professional can integrate with your DMS or CRM as well as SharePoint to provide comparison and other functionality.

> *Note*: *To integrate with a DMS/CRM or SharePoint, Workshare Professional must be installed with the relevant integration selected and additional details may need to be configured in the Workshare Configuration Manager. Refer to your system administrator for further information.*

The specific functionality available with each DMS/CRM integration is detailed in the table below:

> **Note**: *The comparison functionality relates to all file types – Word, PDF, Excel and PowerPoint – unless specified.*

Functionality	iManage	Net Documents	OpenText	Worldox	SharePoint
From Workshare comparison application, browse to DMS	✓	✓	✓	✓	✓
From Workshare comparison application, save to DMS	✓	✓	✓	✓	✓
Right-click from within DMS, launch Workshare comparison	✓ 1	✓ 2	✓	✓ 3	✗
From within DMS, Convert to PDF with Workshare	✓	✓	✓	✓	✗
From Connect desktop app, browse to DMS to add files to Workshare	✓	✓	✓	✓	✓

1   The right-click option is available in iManage FileSite/DeskSite clients. If you're using the iManage Work 10 web client, you can access Workshare comparison for Word and PDF files from the kebab menu but you will need the Workshare IManage Integration Server installed. See Installing WIIS in the knowledge base for more information.

2   The Workshare options are available via Send to application functionality in NetDocuments for Word, PDF and Excel files.

3   The Workshare options are available for Word, PDF and Excel files. In Worldox, Workshare comparison is also available using the Compare Files button in the toolbar.

Accessing Workshare Professional

Workshare Professional can integrate with Microsoft Word, Excel, PowerPoint and Outlook. To this end, there is no independently accessed user interface for Professional - the user interface is accessed from within Word, Excel, PowerPoint or Outlook and is available from all documents.

> *Notes:*
> *If your Workshare Professional is not integrated with Microsoft Word, Excel, PowerPoint and Outlook, refer to your system administrator.*
>
> *The comparison functionality of Workshare Compare is also available as standalone applications. Refer to* Overview - Comparing Documents *and* Introducing Compare for PowerPoint*.*

After you have installed Professional, the Workshare tab is added to the ribbon in your Microsoft Office applications - Word, Excel and PowerPoint. The addition of Professional does not affect the standard functionality of Word, Excel or PowerPoint. You can operate these applications as usual and access the Professional functionality as required.

Workshare Professional functionality can also be accessed in the following ways:

- Right-click closed Word, Excel or PowerPoint documents and select **Compare with Workshare** or **Convert to PDF with Workshare** or **Combine files in Workshare** or **Send to/Workshare Batch Clean**.

- Right-click closed PDF documents and select **Compare with Workshare** or **Open in Word with Workshare** or **Combine files in Workshare** or **Send to/Workshare Batch Clean**.

- Right-click attachments in Outlook and select **Compare with Workshare**.

- Click **Compare** or **Selective Compare** in the Workshare ribbon in Outlook.

- Right-click any file and select **Workshare/Share to Group**.

The Workshare Compare standalone application can also be accessed from the Start menu or by double-clicking the Workshare Compare icon on the desktop.
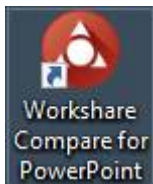
The Workshare Compare for PowerPoint standalone application can also be accessed from the Start menu or by double-clicking the Workshare Compare for PowerPoint icon on the desktop.
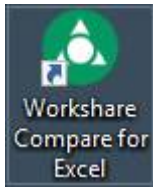
The Workshare Compare for Excel standalone application can also be accessed from the Start menu or by double-clicking the Workshare Compare for Excel icon on the desktop.

Note: Workshare Professional can be installed without Microsoft Office integration. In this case, the Workshare ribbon is not available. The Workshare comparison functionality is only available from the Workshare standalone applications and the Workshare metadata removal functionality is only available when sending emails.

Batch clean

Workshare Batch Clean is a tool that cleans hidden data, such as versions, templates, comments, hidden text, reviewer and author information, from multiple Office documents at the same time. Refer to *Batch cleaning*, for further information.

Workshare ribbon

In Office applications, the Workshare ribbon is included as follows:
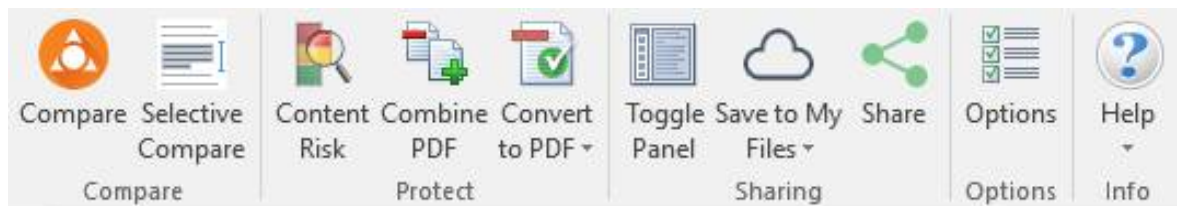
Whether these options are included in the ribbon is configurable from the **General > User Interface** category in the Workshare Configuration Manager. Refer to *Workshare Configuration Options* for further information.

The Workshare ribbon includes the following options:

Group	Item	Description
Compare	**Compare**	Enables you to compare a Word, Excel or PowerPoint file with a previous version of the same file or with another file. Refer to *Overview - Comparing Documents* and *Introducing Compare for PowerPoint* for further information.
	Selective Compare	Enables you to compare a snippet of text with another snippet of text. Refer to *Comparing Selected Content* for further information.

Group	Item	Description
Protect	Content Risk	Enables you to display a report of all the content risk in a document as well as remove selected hidden data from the document. Refer to *Displaying Content Risk in Documents* for further information.
	Combine PDF	Enables you to combine multiple files into a single PDF file. Refer to *PDF Combine* for further information.
	Convert to PDF	Enables you to convert documents to PDF. Refer to *Converting to PDF* for further information.
Sharing	Toggle Panel	Displays/hides the Workshare Connect panel in your Office window where you can see what's happening with a collaboration in real-time. Refer to *Getting Content Online* for further information*.
	Save to My Files	Enables you to save documents to Workshare online so they will be accessible to you online at all times. Refer to *Saving to My Files* for further information.
	Share	Enables you to share documents to groups in Workshare online so you can collaborate on them with others. Refer to *Sharing to a Workshare group* for further information.
Options	Options	Enables you to configure system parameters in the Workshare Configuration Manager. Refer to *Introducing the Workshare Configuration Manager* for further information.
Info	Help	Provides access to version, copyright and license information about Workshare Professional as well as online help.

Enabling Workshare Professional functionality

To ensure Workshare Professional functionality is *fully* enabled, you should work with saved documents. If you are working in Microsoft Office on an unsaved document and you select **Compare** or **Combine PDF**, the following message is displayed:
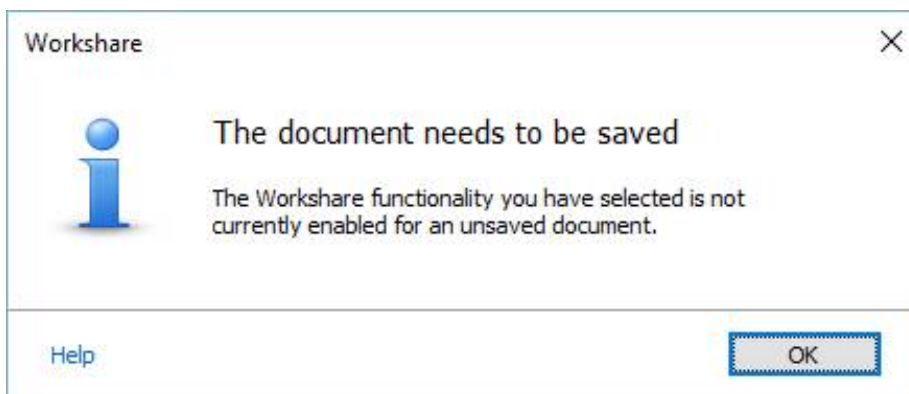
Licensing

After installation, you are prompted to log in to your Workshare account in order to retrieve your license entitlements. This can be in either of the following ways:
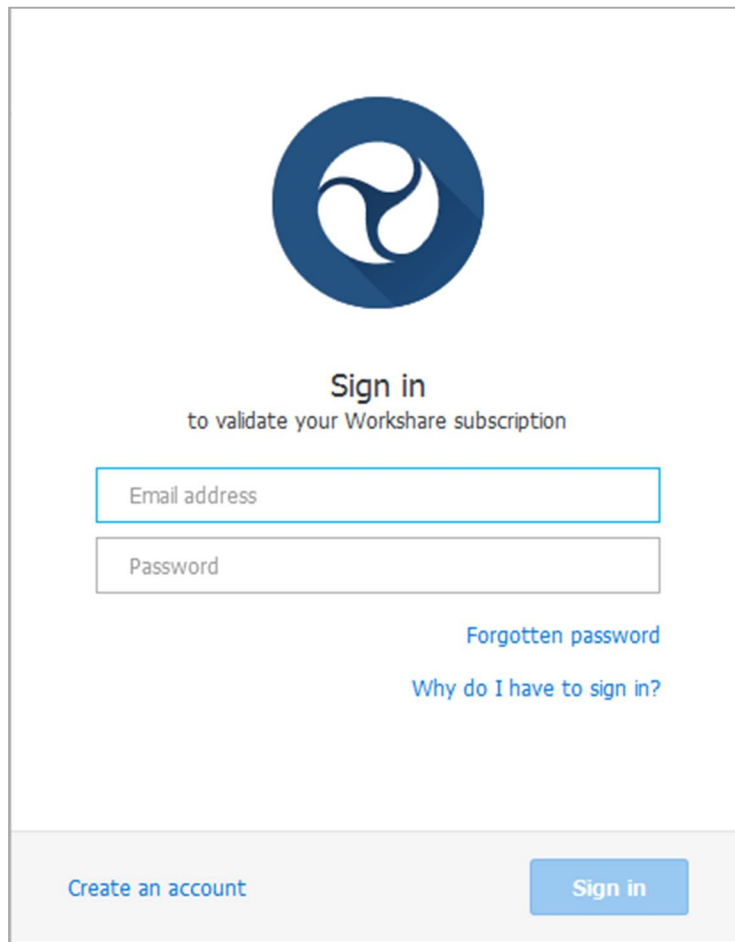
- When file share & sync is included in the installation, the Workshare desktop app is launched after install and you will see the following:
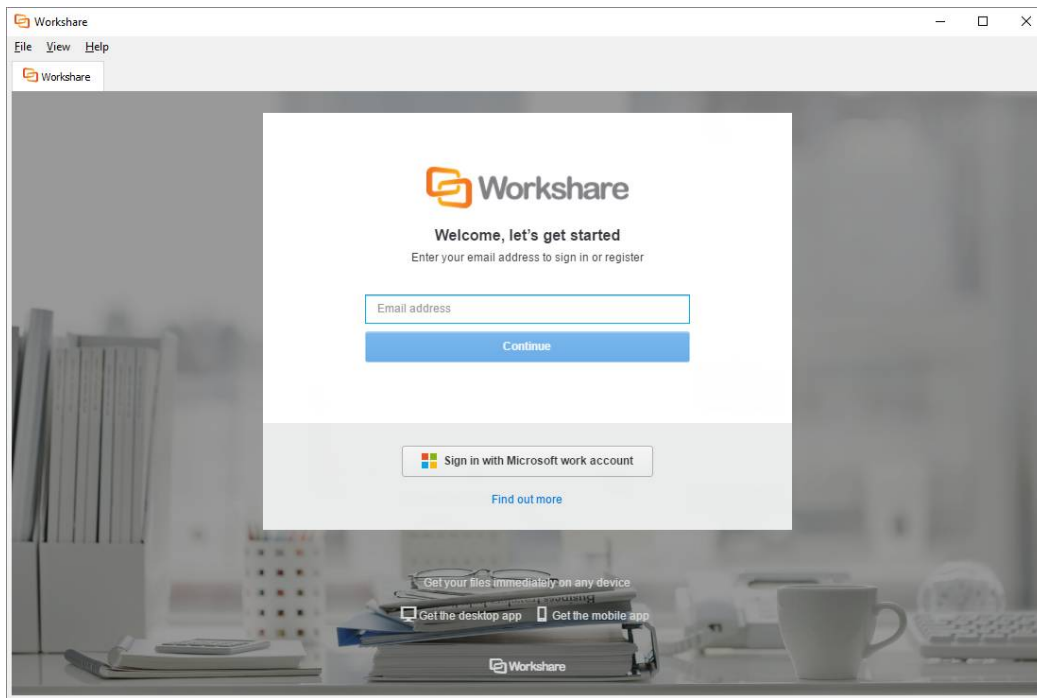
Enter your Workshare credentials (email address and password) and click **Sign in**. Your license entitlements are retrieved and you have access to all Workshare functionality. Your license entitlements are shown in the **My Products** tab of the Workshare Configuration Manager.

If you do not log in at this point, then…

- The first time you access Workshare functionality, for example, by clicking any option in the Workshare tab, you will see the following:

> *Note*: You can also open the Workshare Configuration Manager, select the **My Products** tab and click **Sign in**.

Enter your Workshare credentials (email address and password) for Workshare and click **Sign in**. Your license entitlements are retrieved and you have access to all Workshare functionality. Your license entitlements are 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.

Chapter 2:   Comparing Documents

This chapter describes Workshare Compare, a standalone application that enables you to compare two or more Microsoft Word or PDF documents. It includes the following sections:

- **Overview – Comparing Documents**, page 23, introduces the Workshare Compare application.

- **Performing Comparisons**, page 24, describes how to compare a document against an earlier version of the document or against a different document using Workshare Compare.

- **Comparing Selected Content**, page 30, describes how to compare a snippet of content with another snippet of content.

- **Ensuring Successful Comparisons**, page 31, describes how Workshare Compare performs comparisons using auto retry mode and failsafe mode.

- **Workshare Compare Main Windo**w, page 34, describes the Workshare Compare environment and provides an overview of the functionality available.

- **Working with redlines**, page 51, describes the tools available to you when working with the compared (redline) document after a comparison.

Overview - Comparing Documents

> **Note:** *This chapter describes how to compare Word documents and PDF files. The comparison of PowerPoint presentations is described in Chapter 3 and the comparison of Excel spreadsheets is described in Chapter 4.*

The Workshare Compare application compares documents – the original document and the modified document – and produces a comparison (redline document), enabling you to instantly see any differences between them. In one view, you can see the source documents and the resulting DeltaView redline. You can compare an original document against several different modified documents and see the redline for each comparison in a different tab. You can run multiple comparisons and each time the redline is shown in a new tab. You can select documents locally, from your DMS or CRM or from your network.

You can compare any of the following file formats:

DOC   DOCX   PDF   RTF   TXT

Workshare Compare's powerful engine accurately and reliably displays document changes in a redline document with the differences clearly marked. For example, ~~deleted text is red and struck through~~ and <u>added text is blue and double underlined</u>. All content is compared including images, tables and embedded Microsoft Excel tables. You can review the redline, navigating between the changes and accepting or rejecting the changes to create a new and revised document. To make the review easier, you can customize how the changes are highlighted within the document.

RUN A COMPARISON

Launch Workshare Compare, select the documents to compare and run your comparison.

ACCEPT/REJECT CHANGES

In Compare, review and apply the changes you want.

SAVE AND SHARE

Save your revised document locally or in your DMS, or share it with others.
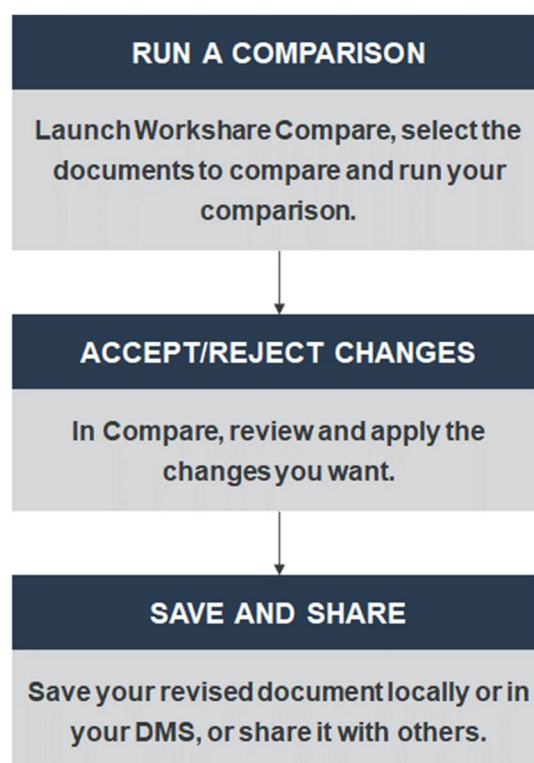
PDF comparison

Workshare Compare can compare both regular text-based PDF files and image-based PDF files that originate from scanned documents. Regular PDF files are compared by converting them to RTF before performing a comparison. With image-based PDF files, Workshare Compare will first apply OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text and then produce an RTF file.

PDF files that originate from scanned documents may include:

- PDF files generated from files that have been scanned: OCR (Optical Character Recognition) has already been used to translate images of typewritten text into editable text. Workshare Compare supports the comparison of such PDF files.

- PDF files that have been created directly from the scanning: Where OCR has not been used and PDF files contain pure images of text. Workshare Compare applies OCR to the PDF files before performing comparisons.

Notes:
If you compare scanned PDF files without applying OCR, it may result in a blank redline.

Workshare Compare can perform OCR on the following languages: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian, Polish, Portuguese, Spanish, Swedish and Russian.

Performing Comparisons

You can compare your original document against any previous version of the document or against another document entirely. For example, there may be ten versions of a document in your DMS. You can open version 3 and compare it against version 5. You can also compare a document against multiple versions. For example, you can open version 3 and compare it against version 5, version 7 and version 10.

Note: You cannot compare secure PDFs, meaning PDF files with security settings configured.

You can launch Workshare Compare and perform comparisons from within Microsoft Word, from your desktop, from right-click options or from an email and each of these scenarios is described in the following sections.

Note: Comparison of selected pieces of text, such as a single paragraph or clause, is described in Comparing Selected Content.

Launching Workshare Compare from Microsoft Word

In this scenario, you first open your document in Microsoft Word.

To compare documents:

Click **Compare** in the *Workshare* tab. The *Compare Documents* dialog is displayed with the open document in the **Modified Document** field. Select the file to compare it against as described in *Launching Workshare Compare from your desktop*.

Launching Workshare Compare using right-click options

You can launch Workshare Compare by right-clicking documents in File Explorer or in your DMS (iManage/OpenText/Worldox).

- Right-click the original document and select **Compare with Workshare**. The *Compare Documents* dialog is displayed with the selected document in the **Original Document** field. Select the files to compare it against as described in *Launching Workshare Compare from your desktop*.

- Select the original and modified documents, right-click and select **Compare with Workshare**. The *Compare Documents* dialog is displayed with the selected documents in the **Original Document** and **Modified Document** fields. Continue as described in *Launching Workshare Compare from your desktop*.

You cannot launch Workshare Compare from SharePoint using right-click options.

You can launch Workshare Compare from the Work 10 browser interface using the kebab (context) menu **if** you have WIIS (Workshare iManage Integration Server) installed. See this knowledge base article - Installing Workshare iManage Integration Server.

Launching Workshare Compare from the Litera ribbon

If configured (in the **General** > **User Interface** category in the Workshare Configuration Manager), the Workshare Compare button is available in the Litera ribbon. Refer to the *Workshare Configuration Options* guide for further information.
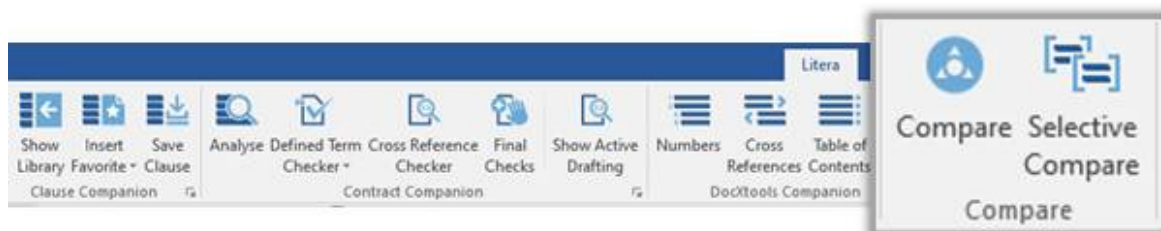
Click **Compare** in the Litera tab. The Compare Documents dialog is displayed with the open document in the **Modified Document** field. Select the file to compare it against as described in *Launching Workshare Compare from your desktop*.

Launching Workshare Compare from email

You can launch Workshare Compare from the dropdown context menu of an attachment to an email or using the Compare button in the Workshare tab.

- Select one (or two attachments), click the dropdown and click **Compare with Workshare**.
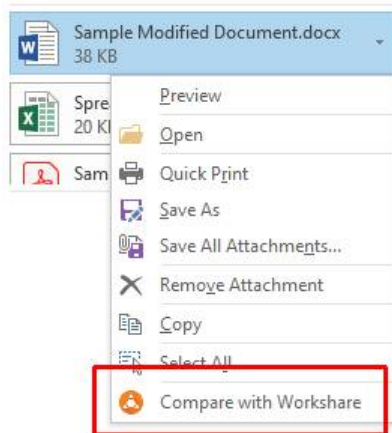
The *Compare Documents* dialog is displayed with the attachment in the **Modified Document** field. Continue as described in *Launching Workshare Compare from your desktop*.

- With an email selected in your inbox, click **Compare** in the *Workshare* tab. If the email doesn't include attachments, the **Compare** button is disabled. If the email includes one or two Word or PDF attachments, the *Compare Documents* dialog is displayed with the attachments selected. If the email contains more than two attachments, the following dialog is displayed:
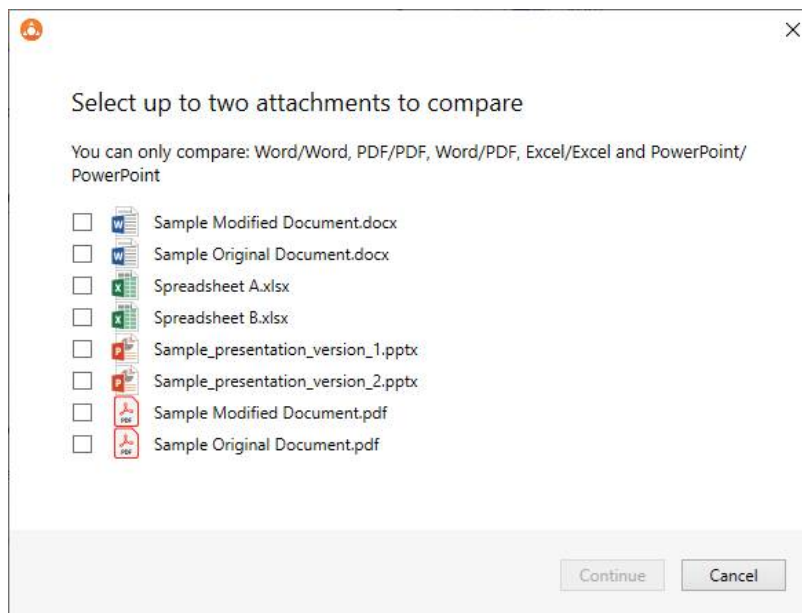
> *Note: The **Compare** button may also be available in the Litera ribbon if configured (in the **General > User Interface** category in the Workshare Configuration Manager).*

Select the attachments you want to compare and click **Continue**. The *Compare Documents* dialog is displayed with the attachments selected. Continue as described in *Launching Workshare Compare from your desktop*.

> *Note: If you select attachments that can't be compared for example, a DOCX and an XLSX, the **Continue** button will be disabled.*

Launching Workshare Compare from your desktop

In this scenario, you launch Workshare Compare as a standalone application from your desktop or the Start menu. You then select the documents you want to compare.

To compare documents:

1. Double-click the Workshare Compare shortcut on your desktop or select **Workshare Compare** from the Start menu. The *Compare Documents* dialog is displayed:
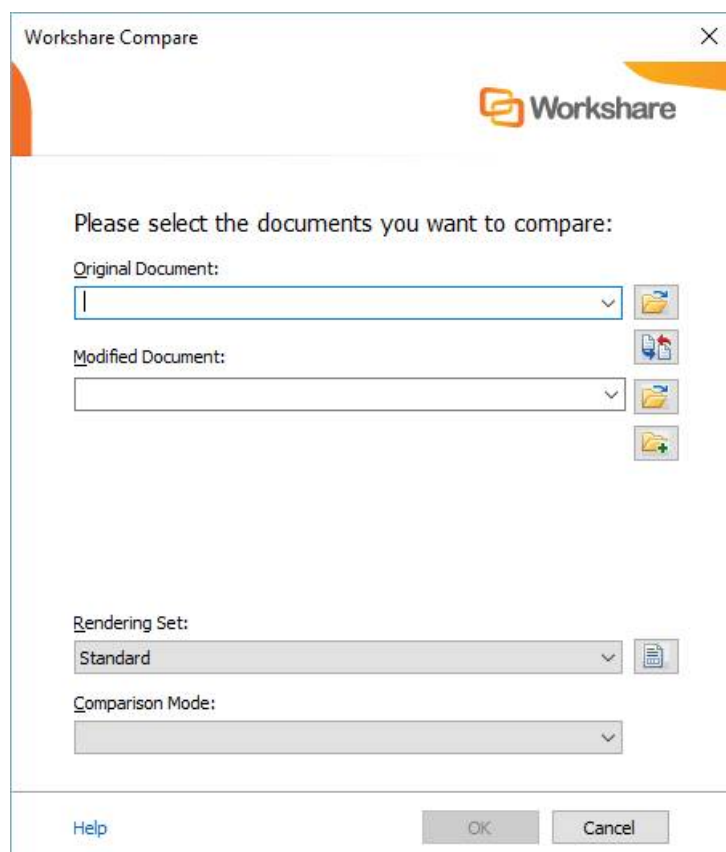
2. Select the original document you want to compare:

    ▫ Drag the file over the **Original Document** field, or

    ▫ Click [icon] to the right of the **Original Document** field, navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**.

    The selected document is displayed in the **Original Document** field.

    > *Tip*: *You can also enter text directly into the text box. Workshare Compare will predict locations as you type. This is possible for locations accessible from the local machine but not for locations in a DMS.*

3. Select the document you want to compare with the original document:

    ▫ Drag the file over the **Modified Document** field, or

    ▫ Click [icon] to the right of the **Modified Document** field, navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**.

    The selected document is displayed in the **Modified Document** field.

    > *Tip!* *If you want to compare a recently used file, click the dropdown* ▼ *in the* ***Original Document*** *and* ***Modified Document*** *fields and select the documents you want to compare. These lists contain the last 10 documents you have used.*
    >
    > *When working with iManage, and the selected document has versions, the recent files list can also include these versions. In this way, you can easily compare different versions of your iManage documents.*

    > *Tip!* *To swap the original and modified documents, click* [icon]. *This button is only available if you are comparing two documents rather than comparing multiple documents against an original document.*

4. If you want to compare the original document against another document, click [icon]. An additional **Modified Document** field is added.

5. Select the document you want to compare with the original document:

    ▫ Drag the file over the second **Modified Document** field, or

    ▫ Click [icon] to the right of the second **Modified Document** field, navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**.

6. Repeat step 5 to add further documents as required.

7. From the **Rendering Set** dropdown list, select the rendering set you want to use. Rendering sets contain a set of parameters that define how changes are displayed in the redline (compared) document. You can select from the standard rendering sets provided with Workshare Compare or you can create and customize your own rendering sets (described in *Introducing Rendering Sets*).

Rendering Set:

Standard

- Standard
- Standard no color
- Standard no moves
- Standard with caret for deletes
- Standard with change numbers
- Standard with font changes
- Standard with shading
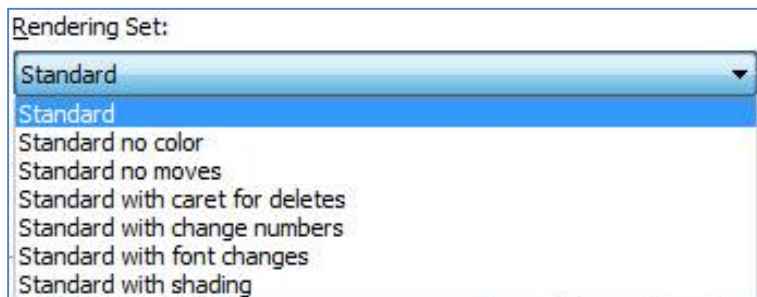
> *Note: Clicking [icon] to the right of the **Rendering Set** field displays the Rendering Sets Manager where you can create, modify and delete rendering sets. For a full description refer to Introducing Rendering Sets.*

8. From the **Comparison Mode** dropdown list, select the type of comparison you want to perform from the following:

   □ **Standard**: Workshare Compare performs a regular comparison.

   □ **Fast**: When comparing a DOC or DOCX file against another DOC or DOCX file, Workshare Compare performs a binary comparison which is faster than a standard comparison.

> *Note: The **Fast** option is only available if the **Enable fast comparison** parameter (**Comparison > Administration** category) in the Workshare Configuration Manager is selected.*

   □ **Text Only**: Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

   □ **Compare without OCR**: Workshare Compare compares PDF files without first performing OCR. With image-based PDF files, Workshare Compare will first apply OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text in order to compare. If you do NOT want Workshare Compare to perform OCR, select this option.

9. Click **OK**. The comparison process is launched and a progress dialog is displayed.

> *Tip: Progress is also indicated by the shading in the Task Bar icon for Workshare Compare* [icon]

When the comparison is complete, the redline is displayed in the Workshare Compare window. If the original document has been compared against multiple documents, each redline is displayed in a different tab. For a full description of the Workshare Compare interface, refer to *Workshare Compare Main Window*.

Note: When comparing a PDF file, the display may vary according to the type of PDF - the software used to create the PDF file. For example, Adobe, Amyuni, CutePDF, novaPDF, and so on.

Comparing Selected Content

You can use Selective Compare to run a comparison on snippets of content pasted from emails, chats or files. This is much faster and more focused than comparing an entire document. Content can include text, tables, code and images and results are displayed in the familiar Compare environment.

To compare selected content:

1. From the Workshare tab, click **Selective Compare**.

Note: Selective Compare may also be available in the Litera ribbon if configured (in the General > User Interface category in the Workshare Configuration Manager).
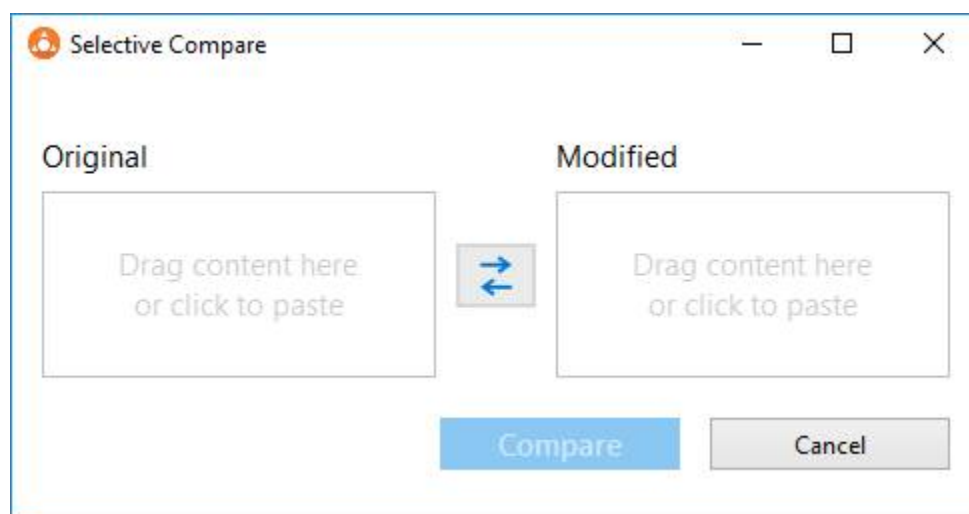
2. Drag the content you want to compare into the **Original** area or click in the area to paste your content there. The content can include text, images, tables, code.

3. In the **Modified** area, drag or paste the content you want to compare with the original content.

> **Tip!** To swap the original and modified content, click ⇄ .

4. Click **Compare**. The comparison is displayed in the Workshare Compare window.

Ensuring Successful Comparisons

If Workshare Compare cannot complete the comparison, it will do one of two things:

- Invoke auto retry mode, if it is enabled.
- Invoke failsafe mode, if auto retry mode is not enabled or if Workshare Compare cannot complete the comparison in auto retry mode.

Auto retry mode

If Workshare Compare is unable to complete the comparison, and auto retry mode is enabled, then Workshare Compare attempts to perform the comparison using reduced settings. For example, Workshare Compare may attempt to compare the documents without comparing field codes or without comparing footnotes. Workshare Compare repeatedly attempts to perform the comparison disabling settings one at a time until the comparison is successful.

> **Note:** Auto retry mode is enabled in the rendering set – the **Allow Auto Retry** parameter in the **Comparison Options** category of the Rendering Sets Manager.

Once the comparison is successful, a message is displayed informing you that the comparison has been performed using reduced settings. Click **OK** and scroll to the Redline Options Summary, which is displayed at the beginning or end of the redline according to the settings in the selected rendering set (in the **Redline Options** category of the Rendering Sets Manager). Even if the rendering set does NOT have the **Include Redline Options Summary** parameter selected, when Workshare Compare performs an auto retry the Redline Options Summary is always displayed after the comparison.

The Redline Options Summary indicates which settings Workshare Compare disabled in order to perform the comparison. For example:

Redline Options Summary	
Option:	**Status:**
Redline Statistics at End of Document	ON
Include Redline Comparison Summary	OFF
Show Line Numbering	OFF
Show Change Numbers	OFF

Redline Options Summary	
Show Change Bars on Left	ON
Show Hidden Text	OFF
Detect List Numbering Changes	ON
Compare Headers/Footers	ON
Compare Footnotes	SET OFF
Display Compare Footers	OFF
Ignore Embedded Objects/Images	OFF
Compare at Character Level	OFF
Compare Numbers at Character Level	OFF
Show Moved Deletions	OFF
Show Changes to Spaces	OFF
Show Paragraph Changes	OFF
Ignore Case Changes	OFF
Ignore Textboxes	SET ON
Ignore Field Codes	OFF
Ignore Tables	OFF

Note: The comparison may take longer than usual because Workshare Compare is attempting to compare using different settings.

The status indications are as follows:

ON   This setting is selected and was applied during the comparison.

OFF   This setting is not selected and was not applied during the comparison.

SET ON   This setting was not selected but was enabled by Workshare Compare and applied during the comparison.

SET OFF This setting was selected but was disabled by Workshare Compare and not applied during the comparison.

If Workshare Compare cannot complete the comparison even using reduced settings, failsafe mode is invoked.

Failsafe mode

If Workshare Compare is unable to complete the comparison and auto retry mode is disabled, or if Workshare Compare cannot complete even a reduced comparison in auto retry mode, then failsafe mode is invoked. Failsafe mode means that Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

You can manually invoke failsafe mode so that a text-only comparison is performed. You may want to do this if, after a full comparison, your redline was not fully shown in Workshare Compare for any reason. Additionally, you may want to do this if you are more interested to see text changes rather than formatting and style changes.

To manually invoke failsafe mode:

Before running the comparison, select **Text Only** as the **Comparison Mode** in the *Compare Documents* dialog.

Workshare Compare Main Window

The Workshare Compare main window enables you to view redlines - the results of a comparison between an original document and a modified document. You can view (in one work area) both source documents, the redline and a summary of the changes between the two source documents.
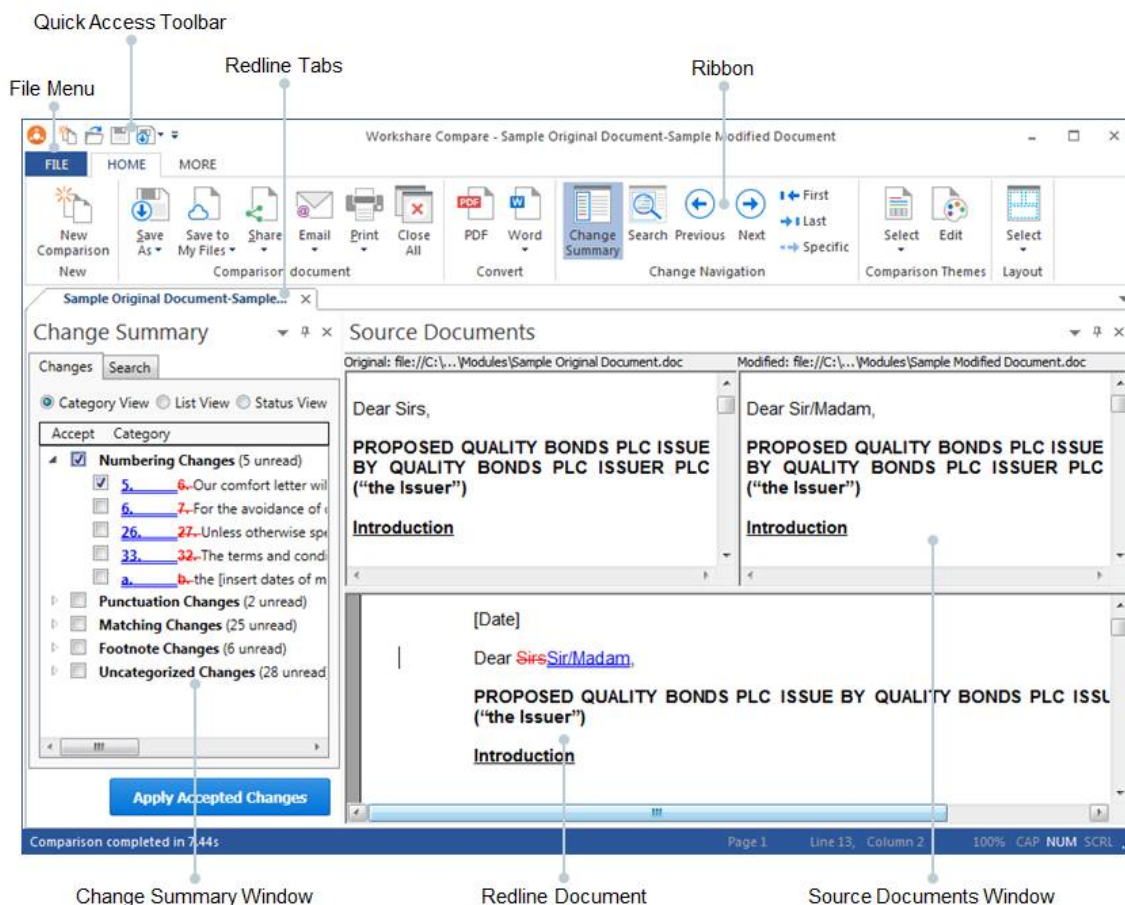
When you select to run multiple comparisons, each resulting redline is displayed in an individual tab.

Moving and placing windows

The Source Documents window and the Change Summary window can easily be moved to different positions in the Workshare Compare main window according to individual preference.

Left-click the title bar of the Source Documents window or Change Summary window and then drag the window to your preferred position. The selected window will float over the workspace.

To dock a window:

Left-click the title bar of a floating window and keep the mouse button pressed. Positioning arrows appear at the top, bottom, left and right of the Workshare Compare main window, as well as in the center.
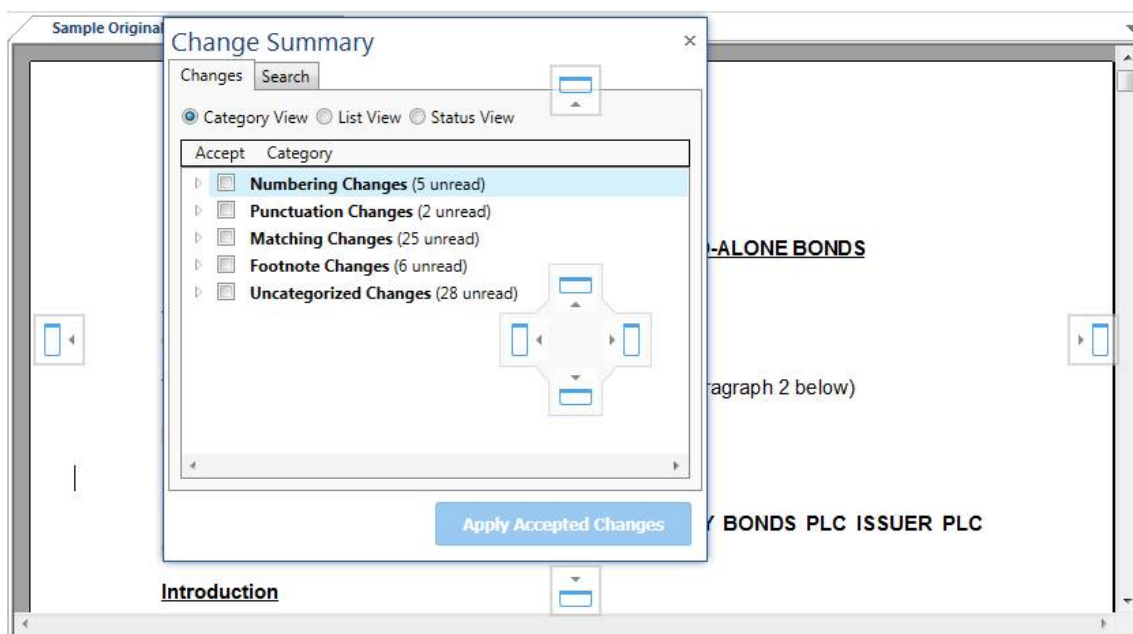
Move the mouse pointer over the required positioning arrow and release the mouse button. The window is docked in the selected location. For example, dragging the Change Summary window over the left positioning arrow will dock the Change Summary window down the left side of the Workshare Compare main window.

To hide a window:

Click ✕ in the top right corner of the Source Documents window or the Change Summary window or use the options in the **Layout** group on the Home tab.

To auto-hide a window:

Click ⊞ in the top right corner of the Source Documents window or the Change Summary window. The selected window is hidden with just a tab remaining.

For example, if the Change Summary window is displayed on the left side of the Workshare Compare main window:

1. Click ⊞, the Change Summary window is hidden with just a tab displayed on the left side.

2. Hover over this tab, the Change Summary window is displayed again and you can work in it as required.

3. Click elsewhere, for example in the redline, the Change Summary window is automatically hidden again.
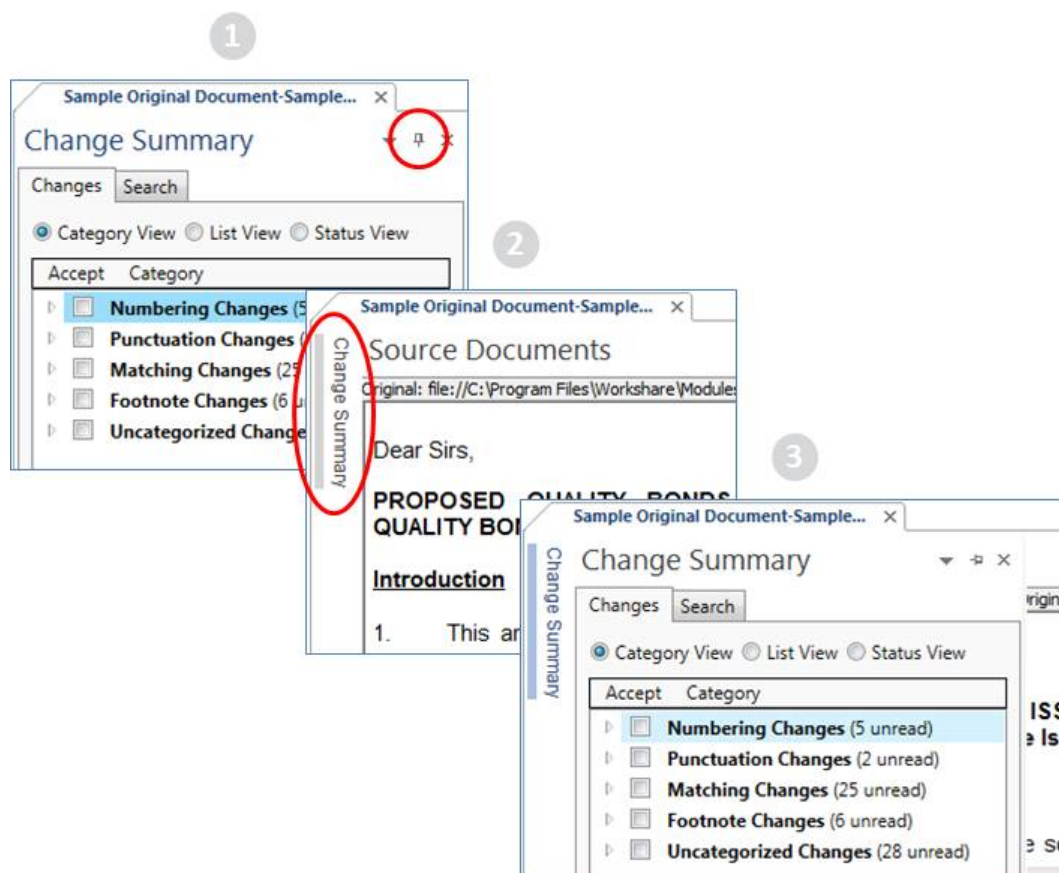
To turn off auto-hide, click ⊞ .

Quick access toolbar

The quick access toolbar provides one-click access to popular functionality. By default, the **New Comparison**, **Open Comparison**, **Save** and **Save As** buttons are included in the quick access toolbar. By clicking the arrow to the right of the quick access toolbar, you can customize it as follows:
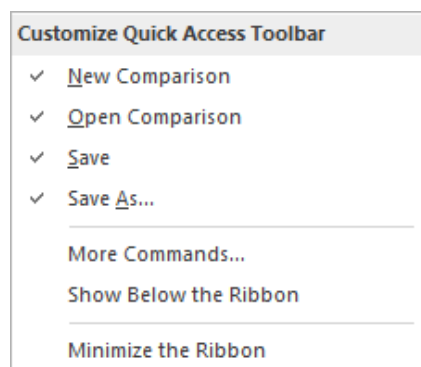
Select/deselect the **New Comparison**, **Open Comparison**, **Save** or **Save As** options to display/hide these options in the quick access toolbar.

Select **More Commands** to add additional options to the quick access toolbar.

Select **Show Below the Ribbon** to display the quick access toolbar below the ribbon.

Select **Minimize the Ribbon** to hide the details of the ribbon until you click the Home, Review or View tabs.

*Note: To change the commands that appear in the quick access toolbar, right-click in the ribbon and select **Customize the Ribbon**. Refer to Customize the Workshare ribbon.*

File menu

Clicking **File** displays a menu with the following options:

Option	Description
New Comparison	Opens the *Compare Documents* dialog enabling you to perform a new comparison. Refer to *Launching Workshare Compare from your desktop*.
Open Comparison	Enables you to open a saved comparison. Comparisons are saved as Workshare DeltaFiles (.WDF). Refer to *Opening saved Workshare DeltaFiles*.
Save	Enables you to save the current comparison. Refer to *Saving redlines*.
Save As	Includes the following sub-options:
Comparison document	Enables you to save the redline as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Saving redlines*.
Word document with Track Changes	Enables you to save the redline as a DOCX document with the changes shown as track changes. Refer to *Saving redline as track change document*.

Option	Description
Save to My Files	Includes the following sub-options:
As Comparison document	Enables you to save the redline to Workshare online as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Saving redlines to Workshare online*.
As Word document with Track Changes	Enables you to save the redline to Workshare online as a DOCX document with the changes shown as track changes. Refer to *Saving to Workshare online as track change document*.
Share	Includes the following sub-options:
As Comparison document	Enables you to share the redline to a group in Workshare online as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Sharing redlines to Workshare online*.
As Word document with Track Changes	Enables you to share the redline to a group in Workshare online as a DOCX document with the changes shown as track changes. Refer to *Sharing to Workshare online as track change document*.
Email	Includes the following sub-options:
Attach as PDF	Converts the redline to PDF and opens a new email window with the PDF attached. Refer to *Sending by email*.
Attach as PDF (only pages with changes)	Converts the changed pages in the redline to PDF and opens a new email window with the PDF attached. Refer to *Sending by email*.
Attach as Word document with Track Changes	Converts the redline to a Word document with the changes shown as track changes and opens a new email window with the document attached. Refer to *Sending by email as track change document*.
More email options….	Enables you to select which documents from the comparison to email and in what format. Refer to *Sending by email*.
Print	Enables you to print the redline and includes the following sub-options: Refer to *Printing redlines*.
Comparison only	Enables you to print the redline.
Comparison + Modified	Enables you to print the redline and the modified source document.
Comparison + Modified + Original	Enables you to print the redline, the modified source document and the original source document.

Option	Description
Print Preview	Enables you to preview the print output and includes the following sub-options:
Comparison only	Enables you to preview the redline.
Comparison + Modified	Enables you to preview the redline and the modified source document.
Comparison + Modified + Original	Enables you to preview the redline, the modified source document and the original source document.
Help	Includes the following sub-options:
Help	Provides access to online help.
About	Displays version and copyright information about Workshare Compare.
Keyboard shortcuts	Displays a list of keyboard shortcuts available in Workshare Compare.
License	Displays information about your Workshare Compare license in the My Products page of the Workshare Configuration Manager.
Workshare Config Manager	Opens the Workshare Configuration Manager where, if you have permission, you can configure system parameters. Refer to *Introducing the Workshare Configuration Manager* for further information.
Exit Workshare Compare	Closes the Workshare Compare application. You are prompted to save any open redlines.

Home tab

The Home ribbon provides access to key functionality in Workshare Compare.

The options are described in the following table.
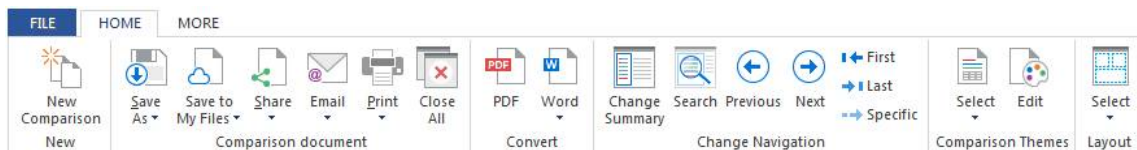
Group	Option	Description
New	**New Comparison**	Opens the *Compare Documents* dialog enabling you to perform a new comparison. Refer to *Launching Workshare Compare from your desktop*.

Group	Option	Description
Comparison document	**Save As**	Includes the following sub-options:
	Comparison document	Enables you to save the redline as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Saving redlines*.
	Word document with Track Changes	Enables you to save the redline as a DOCX document with the changes shown as track changes. Refer to *Saving redline as track change document*.
	Save to My Files	Includes the following sub-options:
	As Comparison document	Enables you to save the redline to Workshare online as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Saving redlines to Workshare online*.
	As Word document with Track Changes	Enables you to save the redline to Workshare online as a DOCX document with the changes shown as track changes. Refer to *Saving to Workshare online as track change document*.
	Share	Includes the following sub-options:
	As Comparison document	Enables you to share the redline to a group on Workshare online as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to *Sharing redlines to Workshare online*.
	As Word document with Track Changes	Enables you to share the redline to a group on Workshare online as a DOCX document with the changes shown as track changes. Refer to *Sharing to Workshare online as track change document*.
	Email	Includes the following sub-options:
	Attach as PDF	Converts the redline to PDF and opens a new email window with the PDF attached. Refer to *Sending by email*.
	Attach as PDF (only pages with changes)	Converts the changed pages in the redline to PDF and opens a new email window with the PDF attached. Refer to *Sending by email*.
	Attach as Word document with Track Changes	Converts the redline to a Word document with the changes shown as track changes and opens a new email window with the document attached. Refer to *Sending by email as track change document*.

Group	Option	Description
	More email options…	Enables you to select which documents from the comparison to email and in what format. Refer to *Sending by email*.
	Print	Enables you to print the redline and includes the following sub-options: Refer to *Printing redlines*.
	Comparison only	Enables you to print the redline.
	Comparison + Modified	Enables you to print the redline and the modified source document.
	Comparison + Modified + Original	Enables you to print the redline, the modified source document and the original source document.
	Close All	Closes all open comparisons.
Convert	**PDF**	Enables you to convert the redline to PDF. Refer to *Converting redline to PDF*.
	Word	Includes the following sub-options:
	Open in Word	Opens the redline in Microsoft Word where you can edit it. Refer to *Editing redlines*.
	Open in Word with Track Changes	Opens the redline in Microsoft Word with the changes converted to track changes so you can implement changes using track changes functionality. Refer to *Showing changes as track changes*.
Change Navigation	**Change Summary**	Displays/hides the Change Summary window.
	Search	Displays the **Search** tab in the Change Summary window enabling you to search for specified text or keywords in the redline and source documents.
	Previous	Navigates to the previous change and highlights the entire change in the redline. Refer to *Navigating between changes*.
	Next	Navigates to the next change and highlights the entire change in the redline. Refer to *Navigating between changes*.
	First	Navigates to the first change and highlights the entire change in the redline. Refer to *Navigating between changes*.

Group	Option	Description
	Last	Navigates to the last change and highlights the entire change in the redline. Refer to *Navigating between changes*.
	Specific	Enables you to navigate to a specific change number. The entire change is highlighted in the redline. Refer to *Navigating to a specific change number*.
Comparison Themes	**Select**	Enables you to select a different rendering set from the dropdown list and Workshare Compare automatically re-runs the comparison applying the selected rendering set. Refer to *Introducing Rendering Sets*.
	Edit	Opens the Rendering Sets Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to *Introducing Rendering Sets*.
Layout	**Select**	Enables you to select what is displayed in the Workshare Compare window.
	Comparison only	Hides the Source Documents window and displays the redline only.
	Comparison + Original	Displays the redline as well as the original document in the Source Documents window.
	Comparison + Modified	Displays the redline as well as the modified document in the Source Documents window.
	Comparison + Original + Modified	Displays the redline as well as both source documents.

More tab

The More ribbon provides access to other useful functionality.

The options are described in the following table.

Group	Option	Description
Original/ Modified	**Swap**	Swaps the original and modified documents. Refer to *Swapping the source documents*.
Mode	**Comparison Mode**	Enables you to select a comparison mode from the dropdown list and Workshare Compare automatically re-runs the comparison in the selected mode – **Fast**, **Standard**, **Text Only** or **Image Based PDF**.
Info	**Help**	Includes the following sub-options:
	Help	Provides access to online help.
	About	Displays version and copyright information about Workshare Compare.
	Keyboard Shortcuts	Displays a list of keyboard shortcuts available in Workshare Compare.
	License	Displays information about your Workshare Compare license in the My Products page of the Workshare Configuration Manager.

Customize the Workshare ribbon

To change the commands that appear in the Workshare Compare ribbons and quick access toolbar, right-click in the ribbon and select **Customize the Ribbon**.
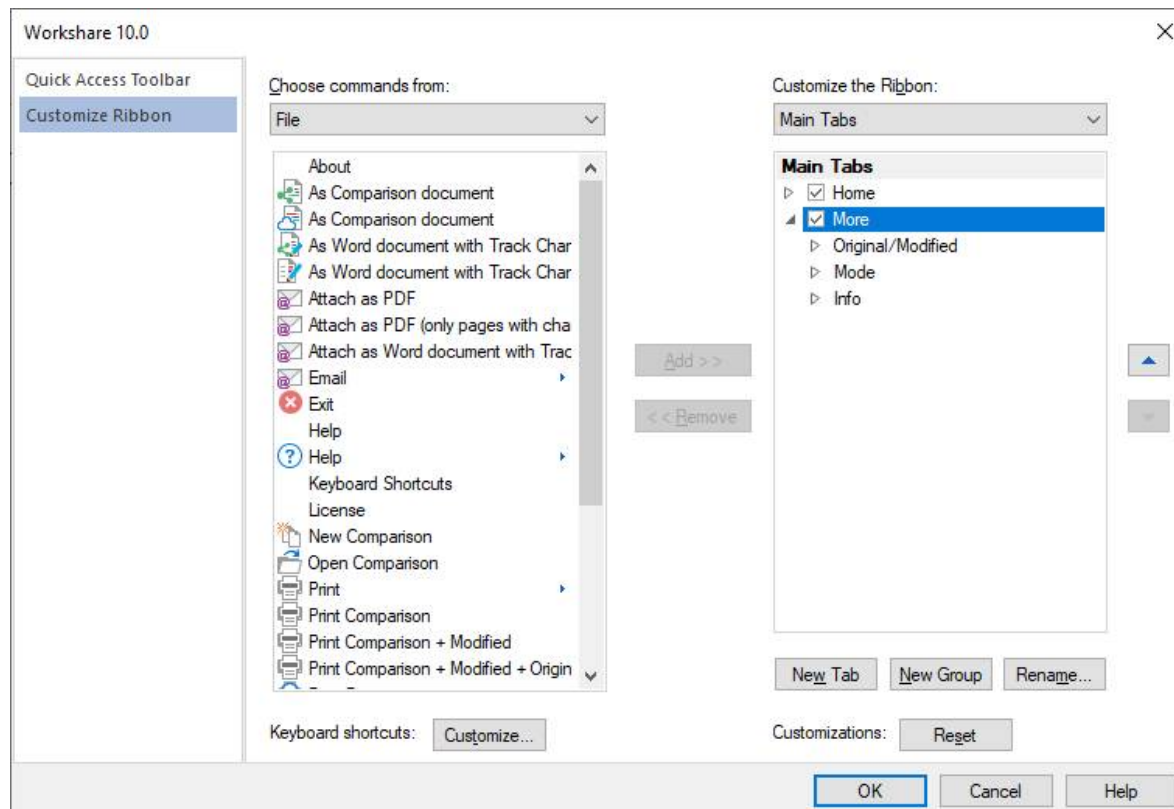
To customize the Compare environment to suit your needs, you can select which commands to include in the **Home** and **More** tabs or add new tabs.

The redline

The DeltaView redline shows the results of the comparison between the original document and the modified document. Changes are marked according to the rendering set applied to the comparison. For example, deleted text could be ~~red and struck through~~ and added text could be [blue and underlined](#).

You can navigate between the changes in the redline and accept/reject the changes to create a new and revised document. You can also save the redline locally, or to your DMS or to Workshare online. All of these options are described in *Working with Redlines*.

Redline tabs
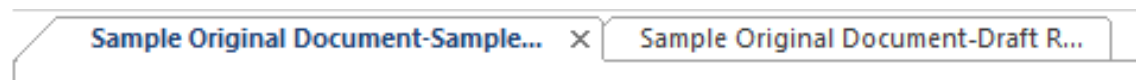
When the original document has been compared against multiple modified documents, or when you have run multiple comparisons, each resulting redline is displayed in a different tab. Select the tab header to display the comparison in the Workshare Compare window. You can also display the tabs simultaneously side by side by clicking and dragging the tab header across the Workshare Compare window.
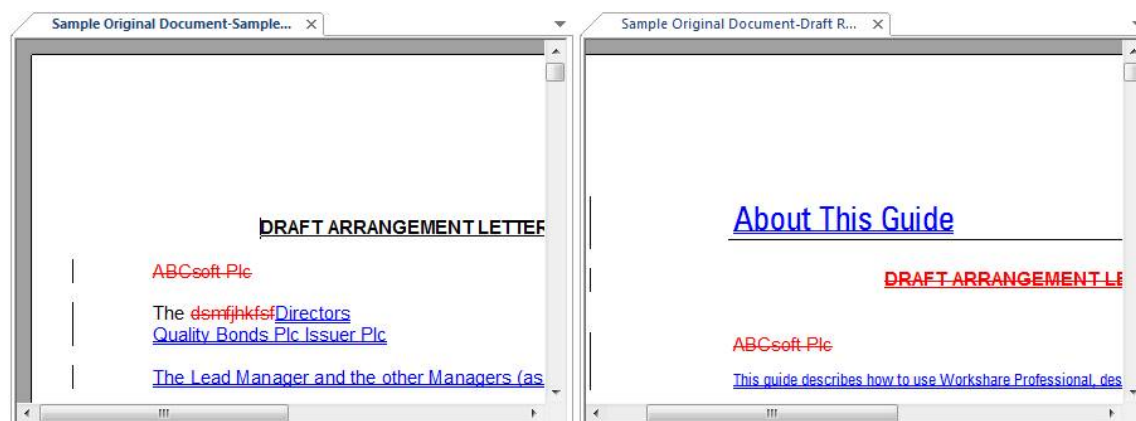
Redline right-click menu

Right-clicking text or changes in the redline displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the redline.
Find	Displays the **Search** tab in the Change Summary window enabling you to search for specified text or keywords in the redline and source documents.
Find Next	When you have specified text or a keyword in the **Search** tab, navigates to the next occurrence of the specified search text or keyword.
Edit redline	Opens the redline in Microsoft Word where you can edit it. Refer to *Editing redlines*.
Convert to Track Changes	Opens the redline in Microsoft Word with the changes converted to track changes so you can implement changes using track changes functionality. Refer to *Showing changes as track* changes.
Zoom	Enables you to change the display of the redline from 20% to 200% of its original size.

Option	Description
Link to Move	When text has been moved to another position, navigates and highlights the text in its new or previous position in the redline. • When right-clicking text in its new position, clicking **Link to Move** highlights the text in its previous position. • When right-clicking text in its original position, clicking **Link to Move** highlights the text in its new position. You must right-click a move-type change for this option to be available.
Link to Change	Jumps to the redline Summary (at the end of the redline) highlighting the selected change. You must right-click a change for this option to be available. *Note: The **Include Redline Comparison Summary** parameter (**Redline Options** category of the Rendering Sets Manager) must be selected in the applied rendering set.*

Redline comparison summary

At the beginning or end of the redline, you can see a summary of the comparison and a list of the changes found.

Redline Summary:

No.	Change	Text
1-2	Change	"Dear Sirs," changed to "Dear Sir/Madam,"
3	Deletion	5. The Lead Manager...with the proposed issue.
4	Insertion	5.
5	Change	"6. Our comfort letter will be provided" changed to "Our comfort letter will be provided"
6	Insertion	6.
7	Change	"7. For the avoidance of doubt, nothing" changed to "For the avoidance of doubt, nothing"

In order for the redline to include this summary, the **Include Redline Comparison Summary** parameter in the **Redline Options** category of the Rendering Sets Manager must be selected in the applied rendering set.

Change Summary window

The Change Summary window provides a list of changes found between the source documents. Selecting a change highlights the change in the redline and displays the position of the change in both the source documents. From the Change Summary window, you accept and reject changes. Refer to *Reviewing changes*.

You can hide/display the Change Summary window by clicking **Change Summary** in the Home tab.

> ***Tip!*** *The Change Summary window is by default positioned down the left side of the Workshare Compare environment. It can be moved as required. Refer to* Moving and placing windows.

The Change Summary window includes two tabs – **Changes** and **Search** – and the **Changes** tab has three views. These are described in the following sections.

Changes tab Category View
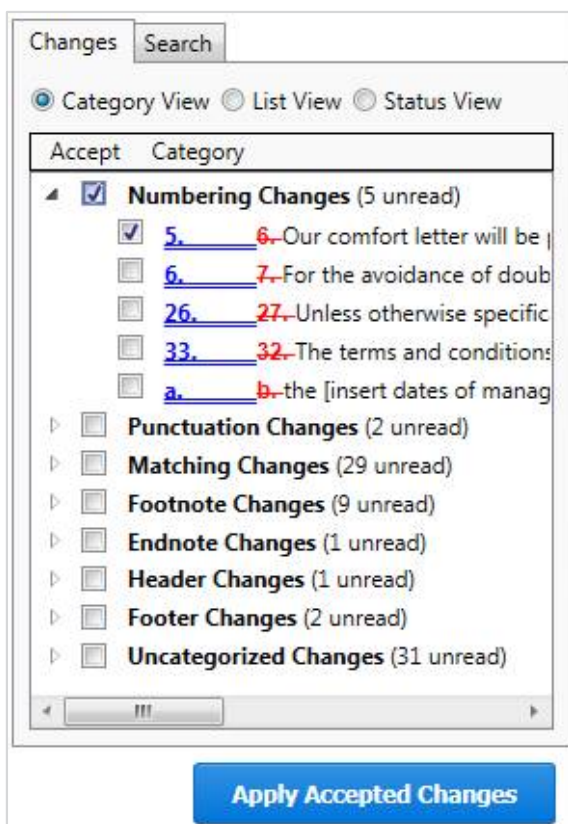
The **Changes** tab, **Category View** displays all the changes between the original document and the modified document according to the type of change. The changes can be grouped into any of the following categories:

- **Numbering Changes**: Any changes to numbering lists identified in a document.

- **Whitespace Changes**: Changes that only involve whitespace – ie deletion/insertion of spaces or tabs, or a space changing to a tab or 3 spaces changing to tabs.

- **Capitalization Changes**: Any changes to the capitalization of a word.

- **Punctuation Changes**: Any changes to a punctuation mark.

- **Spelling Corrections**: Changes where a single word replacement includes the deletion of a word that is not a dictionary word and the insertion of a dictionary word in its place. The replacement word must also be a spell check suggestion for the replaced word – for instance replacing 'recieve' with 'receive'.

- **Word Variations**: Changes which involve changing the form a word ie replacing 'confirms' with 'confirmed' – the two words (original and replacement) must come from the same stem word and just have different endings.

- **Matching Changes**: Changes that are repeated and identical.

- **Suggested Changes**: Changes that a reviewer could have neglected to make. For example, there are 400 instances of "ACME INC" in the original document but the reviewer has only changed 399 of these to "Workshare Inc". The **Suggested Changes** category will indicate that there is 1 change that might have been missed.

- **Style Changes**: Changes made to styles in a document.

- **Font Changes**: Changes made to font type, font style, font colour, underline style, underline color and font effects.

- **Footnote Changes**: Any changes in the footnotes of a document.

- **Endnote Changes**: Any changes in the endnotes of a document.

- **Header Changes**: Any changes in the headers of a document.

- **Footer Changes**: Any changes in the footers of a document.

- **Placeholder Changes**: Blocks of placeholder text that are found to be matching between the original and modified documents. While these are not changes between the two documents as such, they highlight areas where the editing of the document may be incomplete. Typical blocks of placeholder text might be '[Client Name]', '[Company Address]' etc.

- **Boilerplate Changes**: Changes that occur inside blocks of boilerplate text. These changes merit special attention as in general boilerplate text should not be modified. Note that the change is only marked as a boilerplate change if it is found inside an occurrence of one of the boilerplate text items in the original document.

- **Comment Changes**: Changes that have been made to comments.

- **Uncategorized Changes**: Changes that do not fall into any of the above groups.

Changes tab List View
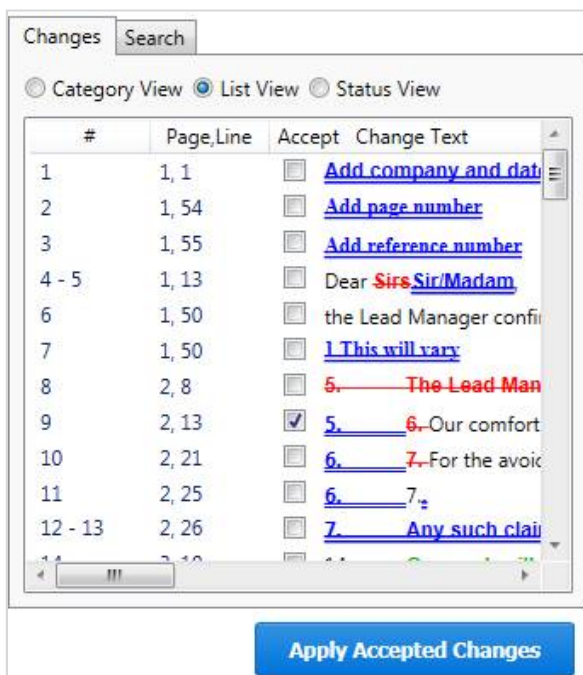
The **Changes** tab, **List View** displays all the changes between the original document and the modified document in the order that they occur. The following information is shown for each change:

#: The number of the change in the document. A change may have two numbers when it includes two actions. For example, a deletion and an addition.

Page, Line: The page number and the line number in the original document where the change occurs.

Accept: Whether you accept the change or not.

Change Text: Details of the change.

Changes tab Status View
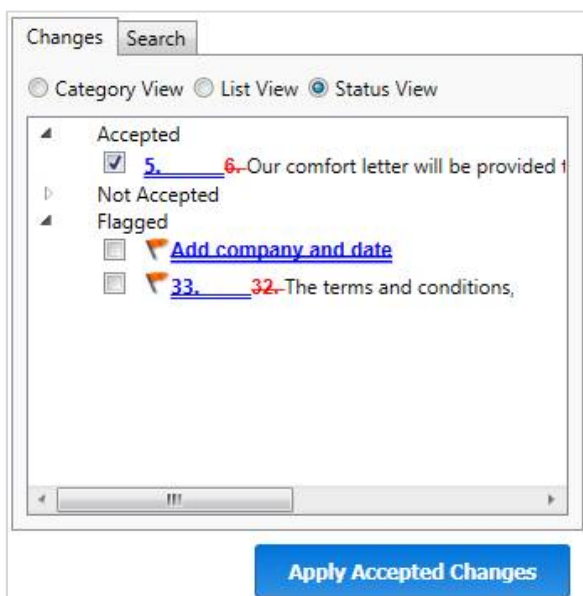
The **Changes** tab, **Status View** displays all the changes between the original document and the modified document according to their review status – **Accepted**, **Not Accepted** or **Flagged**. When you have selected the checkbox to the left of a change, it appears under **Accepted**.

Search tab
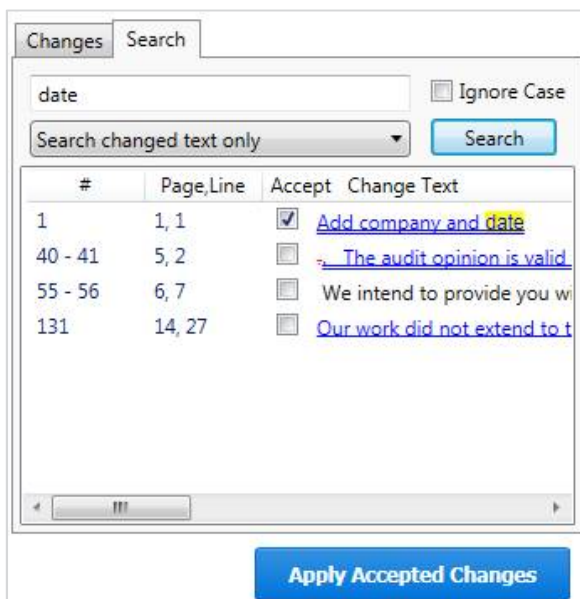
The Search tab enables you to search for changes in the redline that include a specific keyword or text. Refer to *Searching for changes*.

Source Documents window

The Source Documents window is where you can view the documents that have been compared. You can select (from the **Layout** group in the Home tab) to display the original document, the modified document or both documents in the Source Documents window.

You can scroll through both documents. Selecting a point in one source document automatically scrolls the other source document as well as the redline to the same point. The source documents are read-only and cannot be modified in any way. The name of the source document is shown above the document.

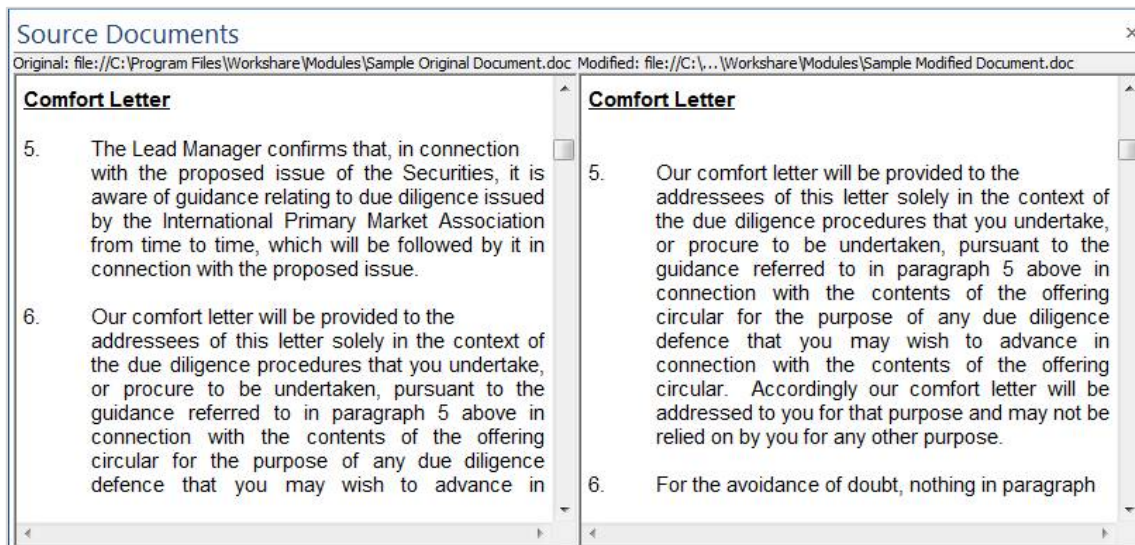*Tip!* *The Source Documents window is by default positioned across the top of the Workshare Compare environment. It can be moved as required. Refer to* Moving and placing windows*.*

Right-clicking text in the original document or the modified document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the original or modified document.
Find	Displays the **Search** tab in the Change Summary window enabling you to search for specified text or keywords in the redline and source documents.
Find Next	When you have specified text or a keyword in the **Search** tab, navigates to the next occurrence of the specified search text or keyword.
Zoom	Enables you to change the display of the original or modified document from 20% to 200% of its original size.

Working with Redlines

This section describes the tools available to you when working with the DeltaView redline after a comparison.

Navigating changes

After performing a comparison, you can review the redline (the result of the comparison) and look through the changes between the original and modified documents. You can move between changes in the redline by jumping from change to change or searching for a specific change using change numbers or keywords. You can also accept or reject the changes and create a new document based on your decisions – refer to *Reviewing changes*.

Navigating between changes

Selecting a change in the Change Summary window highlights the change in the redline and displays the position of the change in both of the source documents.
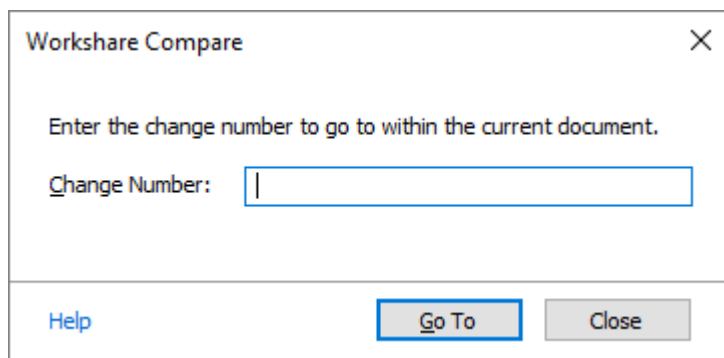
- Click **Previous** in the Home tab to move to the previous change and highlight the entire change in the redline. Click **First** to move to the first change in the redline.

- Click **Next** in the Home tab to move to the next change and highlight the entire change in the redline. Click **Last** to move to the last change in the redline.

Navigating to a specific change number

Changes are allocated numbers, which are displayed next to the change in the Change Summary window. A change may have two numbers when it includes two actions, for example, a deletion and an addition. You can move to a specific change number in the redline.

To navigate to a specific change number:

1. Click **Specific** in the Home tab. The following dialog is displayed:

2. In the **Change Number** field, enter the number of the change you want to display in the redline.

3. Click **Go To**. The entire change is highlighted in the redline.

4. Repeat steps 2 and 3 to navigate to further changes as required.

5. Click **Close** to close the dialog.

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*Tip! To maximize this feature, apply a rendering set with the **Show Change Numbering** parameter selected in the **Redline Rendering** category, Change Numbering section. This shows all the change numbers against each change in the redline, for example,*

Dear Sirs,[1]Sir/Madam,[2] .

Searching for changes

You can search for changes in the redline that include a specified keyword or text. Workshare Compare can search only the changes for the specified text or it can search the text of the original or modified documents.

To search for a change:

1. In the Change Summary window, select the **Search** tab or click **Search** in the Home tab.

2. In the text box at the top of the **Search** tab, enter the search criteria – the word or words for which you want to search.

3. If the case is not important, select the **Ignore Case** checkbox.

4. Select where you want to search from the dropdown list. The options are as follows:

   □ **Search changed text only**: Searches through all text in the redline that has been changed.

   □ **Search text near a change**: Searches through all text in the redline that has been changed and also text that is within 100 characters of a change.

   □ **Search Original Document text**: Searches through all text in the original document.

   □ **Search Modified Document text**: Searches through all text in the modified document.

   □ **Search all Redline text**: Searches through all text in the redline.

5. Click **Search**. A list of changes that include the specified word or words is displayed in the lower text area.
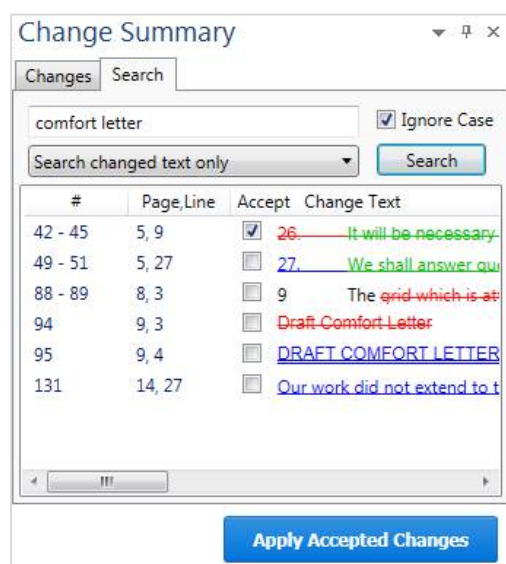
Selecting a change in the search results highlights the change in the redline and displays the position of the change in both the source documents.

Reviewing changes

You can accept and reject changes from within Workshare Compare and create a new Word document that includes all your changes. Changes can be accepted/rejected individually or as a group. Using the **Category View** of the **Changes** tab, you can choose to accept or reject an entire category. For example, the **Matching Changes** category includes changes that are repeated and identical and you can accept or reject them all at one time. Switching to **Status View** provides an easy way to quickly see what changes haven't yet been reviewed.

Selecting a checkbox next to a change indicates you want to accept it. Not selecting a checkbox indicates you want to reject that change.

To accept/reject changes:

1. Review the changes that you care about and mark them in any of the following ways:

   □ In the Change Summary window, select the checkbox to the left of an individual change to accept it.

   □ In **Category View**, select the checkbox to the left of a category to accept all changes in that category.

   > *Tip! You can select all changes in a category by selecting the category checkbox and then deselect one or two changes within that category as required.*

   □ Right-click an individual change or a category and select **Flag**. This is a way to highlight the change – perhaps for future consideration or to check sources.

   □ Right-click an individual change or a category and select **Mark as Read**. This is a way to indicate that you have reviewed the change but do not want to give it a status.

   > *Note: To reset a change marked as read, select **Mark as Unread** from the right-click menu.*

   You reject a change by leaving it unselected.

2. When you have completed your review, click **Apply Accepted Changes** at the bottom of the Change Summary window. A new Word document is opened with the selected changes accepted and the unselected changes rejected. You can save this document as your new master document.

   > *Note: Changes to comments (grouped in the **Comments** category) will not be accepted.*

The comparison is not altered in any way so you can return to the comparison in Workshare Compare and change your mind about whether to accept changes or not. Every time you click **Apply Accepted Changes**, a new Word document is opened with the current accept/reject statuses applied.

You can also save the comparison as WDF file and this will save all your selections along with the source documents and redline document. You can open this WDF at a later time and continue working or send it a colleague for further review.

Editing redlines

A redline remains an accurate comparison of two documents and cannot be directly edited in Workshare Compare. However, you can open the redline in Microsoft Word and edit the document as required. There are two ways of opening the redline in Word – one where the changes appear as text and another where the changes appear as track changes.

Showing changes as text

Using this method, changes appear as normal text with just the formatting to identify them. For example, if the rendering set used in the comparison showed inserted text as red with a double underline, then the text will appear as red with a double underline in Word.

To open the redline in Word:

1. In the **Home** tab, click **Word** and then **Open in Word** or right-click in the redline and select **Edit redline**. The redline is opened in Microsoft Word with the default name redline.docx. All the changes are displayed as ordinary text but with formatting marks indicating whether they are additions, deletions and so on.

2. Edit the document as required.

3. Save the document. By default, the document is saved in a temporary folder.

Showing changes as track changes

Using this method, the changes are converted to track changes and you can implement the changes using Microsoft Word's track changes functionality.

> *Note: The converting to track changes functionality is only enabled, if the **Enable Convert to Track Change functionality** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.*

To convert to track changes:

1. In the **Home** tab, click **Word** and then **Open in Word with Track Changes**. The redline is opened in Microsoft Word with all the changes displayed as track changes.

2. Review the track changes and implement them as required.

3. Save the document. By default, the document is saved in a temporary folder.

Changing the comparison

You can re-run a comparison swapping the source documents, changing the comparison mode, applying a different rendering set or changing specific comparison options.

Swapping the source documents

You can re-run a comparison exchanging the original document for the modified document and the modified document for the original document. For example, if you selected Document A as the original document and Document B as the modified document, Workshare Compare compares Document A to Document B and presents the changes made to Document A. You can then swap the original and modified documents so that Document B is now the original document and Document A is the modified document. Workshare Compare automatically re-runs the comparison, comparing Document B to Document A, and presents the changes made to Document B.

To swap the source documents:

Click **Swap** in the **More** tab to swap the source documents. Workshare Compare automatically runs a new comparison, using the modified document as the original document and the original document as the modified document. The new redline is displayed in the same tab replacing the first comparison.

Changing the comparison mode

You can re-run a comparison using a different comparison mode (or type) if required.

To re-run a comparison using a different mode:

In the **More** tab, click **Comparison Mode** and then select the required mode from the following:

- **Fast**: Workshare Compare performs a fast comparison. When comparing a .DOC file against another .DOC file, Workshare Compare performs a binary comparison which is faster than a standard comparison because it is comparison at the binary level. When comparing a .DOCX file against another .DOCX file, Workshare Compare performs a faster comparison by converting the documents to DOC followed by comparison at the binary level.

> *Note: The **Fast** option is only available if the **Enable fast comparison** parameter (**Comparison > Administration** category) in the Workshare Configuration Manager is selected.*

- **Standard**: Workshare Compare performs a regular comparison.

- **Text Only**: Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

- **Image Based PDF**: Workshare Compare will re-run the comparison and force OCR processing on scanned/image content. You may want to try this if Workshare Compare has performed a **Standard** or **Fast** comparison and some scanned/image content has not been converted to text.

> *Note*: *This type of 'forced' OCR may be useful when scanned pages are difficult to detect, for example, when they have lots of annotations on top of the scans like Bates numbering, etc. or when the text is actually vector output (from a CAD product for example) and there are no actual characters with fonts in the PDF.*
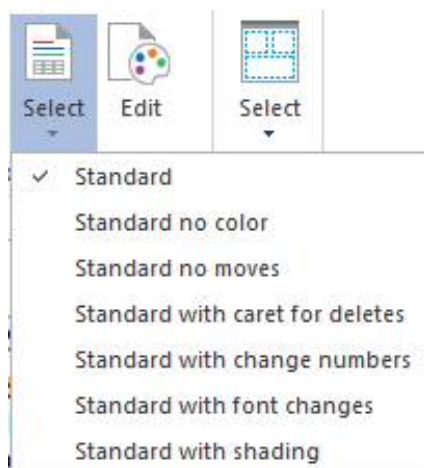
Workshare Compare re-runs the comparison using the selected mode and displays the resulting redline in the Workshare Compare main window.

Applying a different rendering set

You can re-run a comparison using a different rendering set.

To re-run a comparison with a different rendering set:

1. In the **Home** tab, click **Select** in the **Comparison Themes** group. A list of the currently defined rendering sets is displayed.

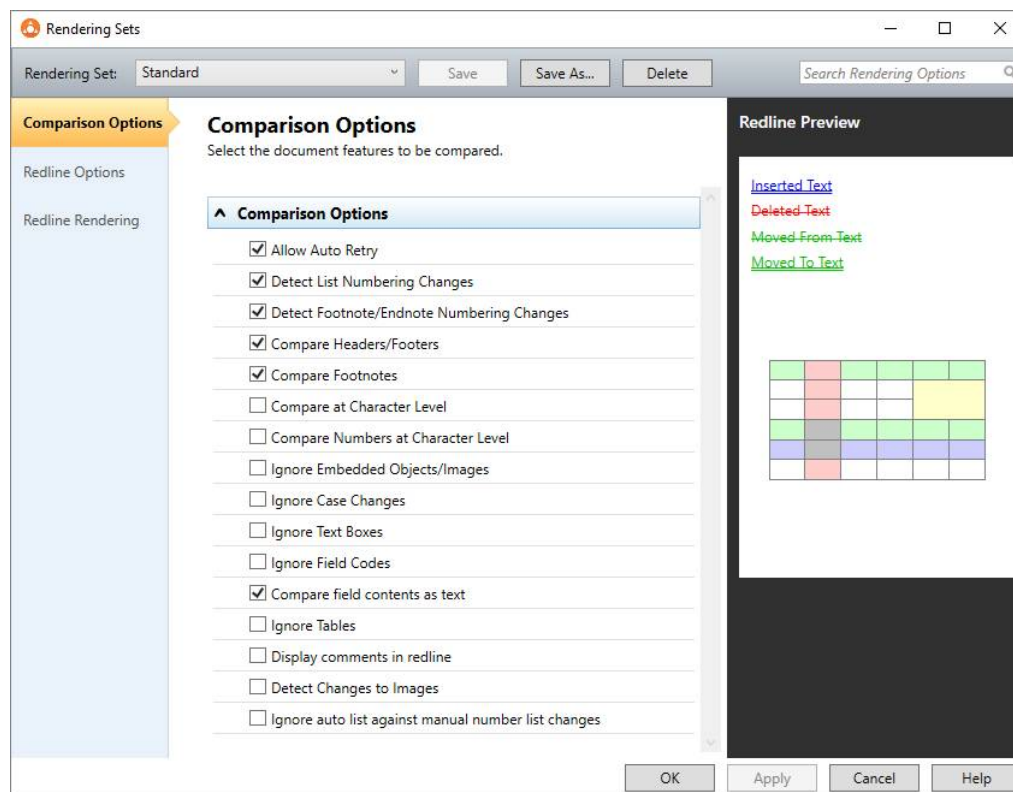2. Select the rendering set to apply.

Workshare Compare re-runs the comparison using the selected rendering set and displays the resulting redline in the Workshare Compare main window.

Changing the comparison options

You can re-run a comparison changing specific options within the rendering set.

To re-run a comparison with different options:

1. In the **Home** tab, click **Edit** in the **Comparison Themes** group. The Rendering Sets Manager is displayed.

2. Edit the rendering set parameters as required. For example, select the **Ignore Tables** checkbox. Rendering set parameters are described in *Rendering Set Parameters*.

3. Do one of the following:

   □ Click **Apply**. Workshare Compare re-runs the comparison using the selected parameters and displays the resulting redline in the Workshare Compare main window. Click **OK** to close the Rendering Sets Manager. Any changes you made to the rendering set parameters are lost.

▫ Click **OK**. The save dialog is displayed. Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, ", /, \\ or |. Click **Yes**. Workshare Compare re-runs the comparison using the revised options and saves the revised options as the specified rendering set. Click **No**. Workshare Compare re-runs the comparison using the revised options and saves the revised options as a temporary rendering set called "Custom rendering set".

Note: The "Custom rendering set" will be selected in the Rendering Set dropdown list the next time the Rendering Sets Manager is opened. However, once you navigate away from the "Custom rendering set" and a different rendering set is selected and the Rendering Sets Manager is closed, the "Custom rendering set" is lost.

Distributing redlines

After you have compared your documents, Workshare Compare provides many options for saving or circulating the redline. Workshare's DeltaView redline can be distributed in many formats, such as PDF or TXT or DOCX. Only if it is distributed as a WDF will your 'Accept' and 'Flag' selections, as well as the source documents, be included. WDF files can only be opened in Workshare Compare. The redline can also be distributed as a Word document with the changes shown as track changes. The following sections describe how you can distribute your redlines:

- Save locally or to your DMS, refer to *Saving redlines*
- Save to Workshare online, refer to *Saving redlines to Workshare online*
- Share to Workshare online, refer to *Sharing redlines to Workshare online*
- Email, refer to *Sending by email*
- Print, refer to *Printing redlines*
- Convert to PDF, refer to *Converting redline to PDF*

Saving redlines

You can save the redline as a Workshare Compare DeltaFile (WDF), which contains all three documents (original, modified and redline) as well as your 'Accept' and 'Flag' selections. You can also save just the redline as a DOC/DOCX, RTF, HTM, TXT or PDF file or you can save the redline as a track change document.

You can save the redline to your DMS/CRM, SharePoint or locally. The following procedure describes how to save to NetDocuments as an example.
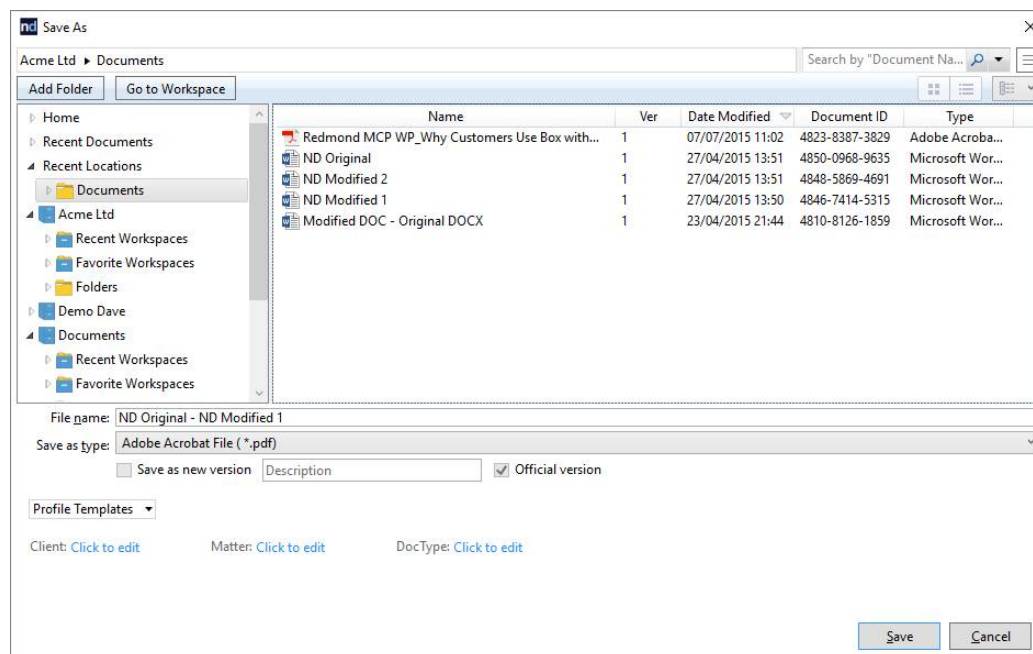
To save the redline:

1. Click **Save As** and then **Comparison document** in the **Home** tab (or quick access toolbar or File menu). The following dialog is displayed.
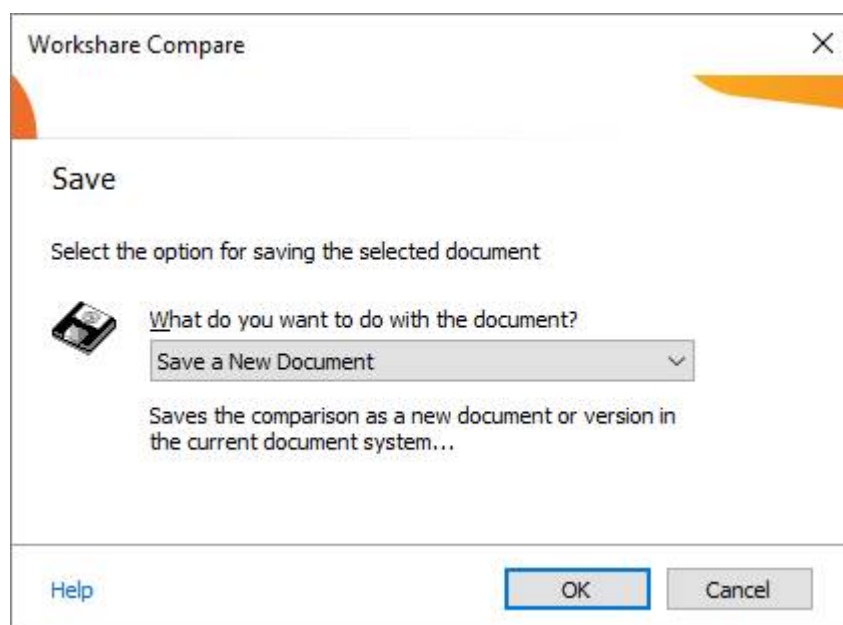
2. Select whether you want to save the comparison as a new document or attach it to the original or modified documents.

3. Click **OK**. The NetDocuments *Save As* dialog is displayed.

> **Notes:**
> *If you are not working with a DMS or SharePoint, the LocalStore Save As dialog is displayed.*
>
> *If you click **Cancel** in the DMS save dialog, a message is displayed asking if you would like to save the redline locally.*
>
> ***Tip!** If you are working with a DMS or SharePoint but both documents compared are local documents, then you can press the **Shift** key while clicking **Save** and the LocalStore Save As dialog is displayed.*

4. Browse to the location where you want to save the comparison and modify the name of the comparison as required.

5. From the **Save as type** dropdown list, select the format for the saved file from the following:

Workshare DeltaFile (*.wdf)	Saves both the redline and the source documents, as well as your 'Accept' and 'Flag' selections, as a Workshare DeltaFile. This file can only be opened in Workshare Compare.
Word Document (*.doc/*.docx)	Saves the redline as a Microsoft Word file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Text Only (*.txt)	Saves the redline as a text file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Rich Text Format (*.rtf)	Saves the redline as an RTF file. The source documents and your 'Accept' and 'Flag' selections are not saved.
HTML Document (*.htm)	Saves the redline as a HTML document. The source documents and your 'Accept' and 'Flag' selections are not saved.
Adobe Acrobat File (*.pdf)	Saves the redline as a PDF file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Adobe Acrobat PDF/A File (*.pdf)	Saves the redline as a PDF/A file. The source documents and your 'Accept' and 'Flag' selections are not saved.

6. Click **Save**.

Saving redline as track change document

You can also save the redline as a Microsoft Word file that shows the changes as track changes.

*Note: The converting to track changes functionality is only enabled, if the **Enable Convert to Track Change functionality** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.*

To save redlines with changes as track changes:

1. Click **Save As** and then **Word document with Track Changes** in the Home tab (or quick access toolbar or File menu).

2. Select whether you want to save the comparison as a new document or attach it to the original or modified documents.

3. Click **OK**. The NetDocuments *Save As* dialog is displayed.

4. Browse to the location where you want to save the track change document and modify the name of the document as required.

5. Click **Save**. The redline is saved as a Microsoft Word document with the changes indicated by track changes.

When you open the saved file in Microsoft Word, the changes are displayed as track changes.

Opening saved Workshare DeltaFiles

When a comparison has been saved as a Workshare DeltaFile, you can open it from Workshare Compare.

To open a saved comparison:

1. Click **Open Comparison** from the File menu. An *Open* dialog is displayed.

   > *Note: Clicking **Open** when you work with a DMS/CRM or SharePoint accesses the DMS/CRM or SharePoint. To open from a local or network drive, hold the Shift key down when clicking **Open** or click **Cancel** in the DMS/CRM or SharePoint open dialog.*

2. Navigate to the location where the comparison is saved and select the WDF file you want to open.

3. Click **Open**. The selected comparison is opened in Workshare Compare. The source documents and the redline are displayed as well as any 'Accepted' and 'Flagged' selections you made in the Change Summary window.

Saving redlines to Workshare online

If you work with Workshare online, you can save redlines there so they will be accessible to you online at all times.

You can save the redline as a Workshare DeltaFile (WDF), which contains all three documents (original, modified and redline) as well as your 'Accept' and 'Flag' selections. You can also save just the redline as a DOC/DOCX, RTF, HTM, TXT or PDF file or you can save the redline as a track change document.

> *Note: You can also use Save As and save the redline to your Workshare sync folder and it will be synchronized to Workshare online. Refer to Adding files to Workshare.*

To save the redline to Workshare online:

1. Click **Save to My Files** and then **As Comparison document** in the **Home** tab (or File menu). The *Save to My Files* dialog is displayed.
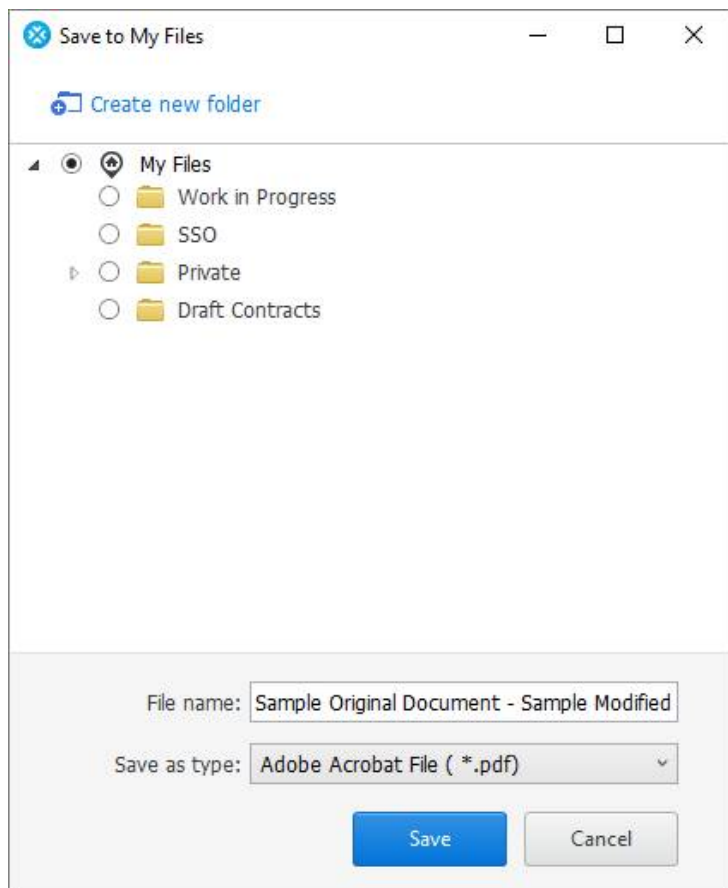
2. Browse through My Files and select the folder where you want to save the comparison.

> *Note: To create a new folder, click **Create new folder**, enter a name for the folder and click **Create**.*

3. In the **File name** field, modify the name of the comparison as required.

4. From the **Save as type** dropdown list, select the format for the saved file from the following:

Workshare DeltaFile (*.wdf)	Saves both the redline and the source documents, as well as your 'Accept' and 'Flag' selections, as a Workshare DeltaFile. This file can only be opened in Workshare Compare.
Word Document (*.doc/*.docx)	Saves the redline as a Microsoft Word file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Text Only (*.txt)	Saves the redline as a text file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Rich Text Format (*.rtf)	Saves the redline as an RTF file. The source documents and your 'Accept' and 'Flag' selections are not saved.
HTML Document (*.htm)	Saves the redline as a HTML document. The source documents and your 'Accept' and 'Flag' selections are not saved.
Adobe Acrobat File (*.pdf)	Saves the redline as a PDF file. The source documents and your 'Accept' and 'Flag' selections are not saved.
Adobe Acrobat PDF/A File (*.pdf)	Saves the redline as a PDF/A file. The source documents and your 'Accept' and 'Flag' selections are not saved.

5. Click **Save**.

Saving to Workshare online as track change document

You can also save the redline to Workshare online as a Microsoft Word file that shows the changes as track changes.

*Note: The converting to track changes functionality is only enabled, if the **Enable Convert to Track Change functionality** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.*

To save redlines to Workshare online with changes as track changes:

1. Click **Save to My Files** and then **As Word document with Track Changes** in the Home tab (or File menu).

2. In the *Save to My Files* dialog displayed, select a folder in My Files (or create a new one), specify a name for the track change document and click **Save**. The redline is saved as a Microsoft Word document with the changes indicated by track changes.

## Sharing redlines to Workshare online

When you work with Workshare online, you can share redlines to groups there so you can collaborate on them with others.

You can share the redline as a PDF file or you can share the redline as a track change document.
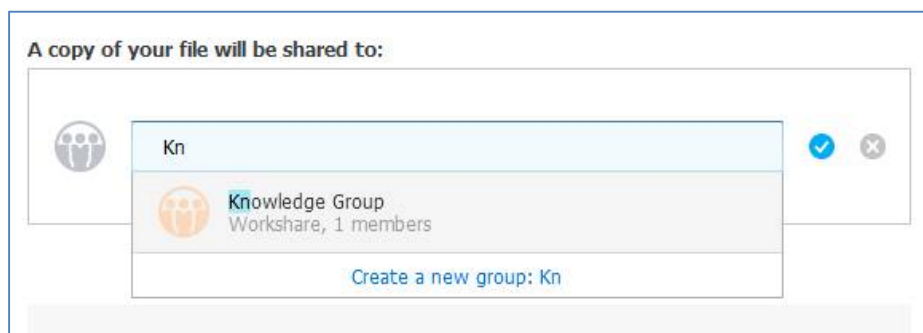
> **Note**: *You can also use Save As and save the redline to a group folder in your Workshare sync folder and it will be synchronized to Workshare online. Using this method, you could share the entire comparison, including the source files and your 'Accept' and 'Flag' selections as a WDF file. Refer to* Adding files to Workshare*.*

To share the redline to Workshare online:

1. Click **Share** and then **As Comparison document** in the **Home** tab (or File menu). The *Share* dialog is displayed.
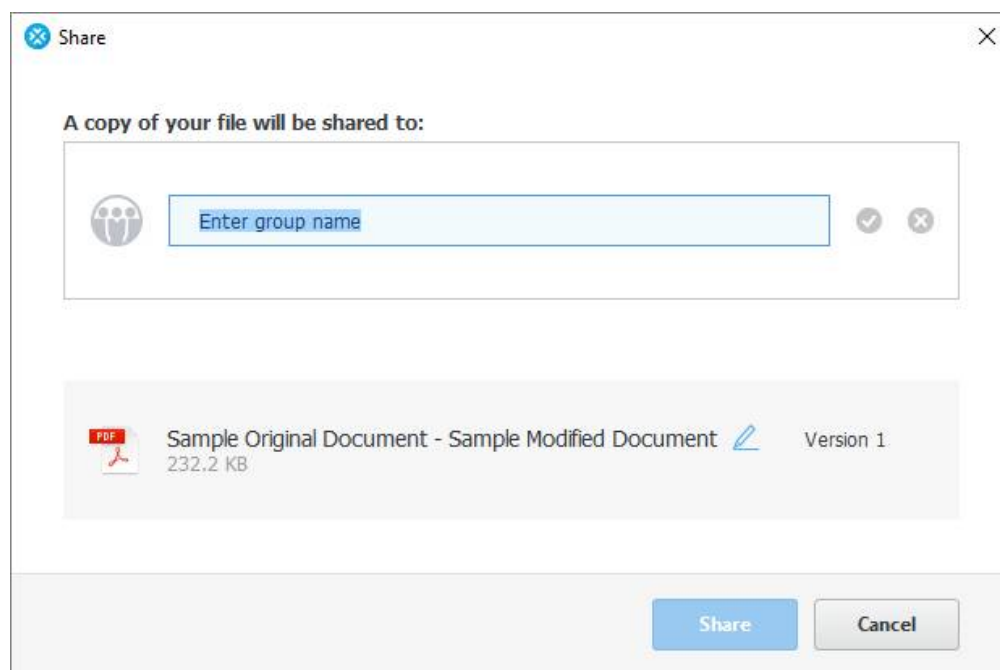
2. Enter the name of the group you want to share the redline with. As you start to enter the name, groups are suggested to you.

A copy of your file will be shared to:

Kn

Knowledge Group
Workshare, 1 members

Create a new group: Kn

3. Select a group or enter a new group name and click **Create a new group**.

4. Edit the name of the redline by clicking ✎, modifying the name and then clicking ✔.

5. Click **Share**. The redline is saved to the group in Workshare online and a confirmation dialog is displayed.

⊗ Share ✕

File shared

A copy of **Sample Original Document - Sample Modified Document** has been shared in the following group:

Sunset Project Group
Workshare Ltd

Link to file:
https://my.workshare.com/#groups/share/5c4afcc6-588d-11e6-a415-000d3ab2f07b

Create email   Go to group
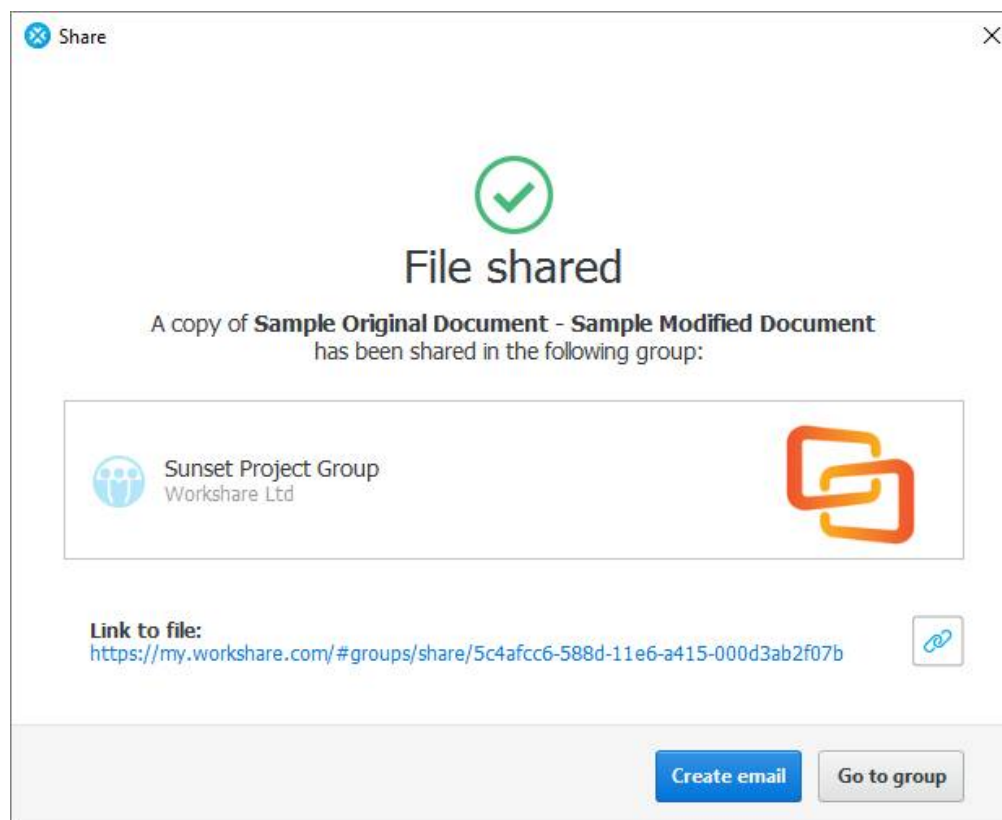
6. Continue in one of the following ways:

   ▫ Click **Send email** to open a new email in Outlook that includes a link to the redline in Workshare online. You can invite people to the group by sending the email to them.

   ▫ Click **Go to group** to open the group in Workshare online where you can see the redline and set group permissions and members.

> *Note: Click* *to copy the link to the redline to your clipboard. You can then paste this link to another location, for example, an email or an instant message.*

Sharing to Workshare online as track change document

You can also share the redline to Workshare online as a Microsoft Word file that shows the changes as track changes.

> *Note: The converting to track changes functionality is only enabled, if the **Enable Convert to Track Change functionality** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.*

To share redlines to Workshare online with changes as track changes:

Click **Share** and then **as Word document with Track Changes** in the Home tab (or File menu). The redline is saved as a Microsoft Word document with the changes indicated by track changes and shown in the *Share* dialog as a DOCX file. Complete the share process as described in the procedure above.

Sending by email

Workshare Compare integrates with your email system so you can send redlines as well as the original and modified documents as email attachments. You can send the entire redline or just the pages that include changes. You can also send the redline as a Microsoft Word file that shows the changes as track changes. This is useful if the recipient does not have Workshare Compare.

To send a redline as a PDF:

Click **Email** and then **Attach as PDF** in the **Home** tab (or File menu). The redline is converted to PDF and a new email window is opened with the PDF attached.

To send changed pages as a PDF:

Click **Email** and then **Attach as PDF (only pages with changes)** in the **Home** tab (or File menu). The changed pages in the redline are converted to PDF and a new email window is opened with the PDF attached.

To send multiple files:

1. Click **Email** and then **More email options** in the **Home** tab (or File menu). The *Email Comparison Documents* dialog is displayed.

2. Select the files to send by selecting one of the following options:

   □ **Individual documents included in this comparison**

   Selecting this option displays a list of the documents included in the comparison in the lower pane. Select the checkboxes to the left of the documents you want to send. You can click in the **Document Name** fields and modify the names of the documents.

   > *Note: The original and modified documents are sent in Microsoft Word format and the redline is sent by default as a PDF. Click in the **Document Format** field of the redline to change the default format, for example, to RTF.*

▫ **Workshare Compare's internal file format (DeltaFile)**

Selecting this option sends the compared documents as a DeltaFile which contains all three documents (original, modified and redline) as well as your 'Accept' and 'Flag' selections. A DeltaFile can only be opened in Workshare Compare. The file extension for a DeltaFile is WDF.

Document Type	Document Name
☑ Workshare DeltaFile	Sample Original Documen

*Tip! Click in the **Document Name** field to change the name of the redline.*

▫ **Multiple redlines**

Selecting this option lists all the redlines currently open (each in a different tab in the Workshare Compare window). Select which ones you want to attach to your email. You can change the name of the redline in the Document Name field and select a different format for the redline from the Document Format field.

Document Name	Document Format
☐ AllCatsOrig - AllCatsMod	Adobe Acrobat File (*.pdf) ⌄
☐ Sample Original Document - Sample Modified Document	Adobe Acrobat File (*.pdf) ⌄

3. If you only want to include the pages with changes in the redline, select the **Only include pages**…. checkbox. This is only available when you are sending the redline as a PDF.

4. Click **OK**. An email message window is displayed with the selected files as attachments.

5. Enter the recipient(s) name and any other text you want to include and click **Send**.

Sending by email as track change document

You can also send the redline as a Microsoft Word file that shows the changes as track changes.

*Note: The converting to track changes functionality is only enabled, if the **Enable Convert to Track Change functionality** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.*

To send redlines with changes as track changes:

Click **Email** and then **Attach as Word document with Track Changes** in the **Home** tab (or File menu). The redline is saved as a Microsoft Word document with the changes indicated by track changes and a new email window is opened with the Word document attached.
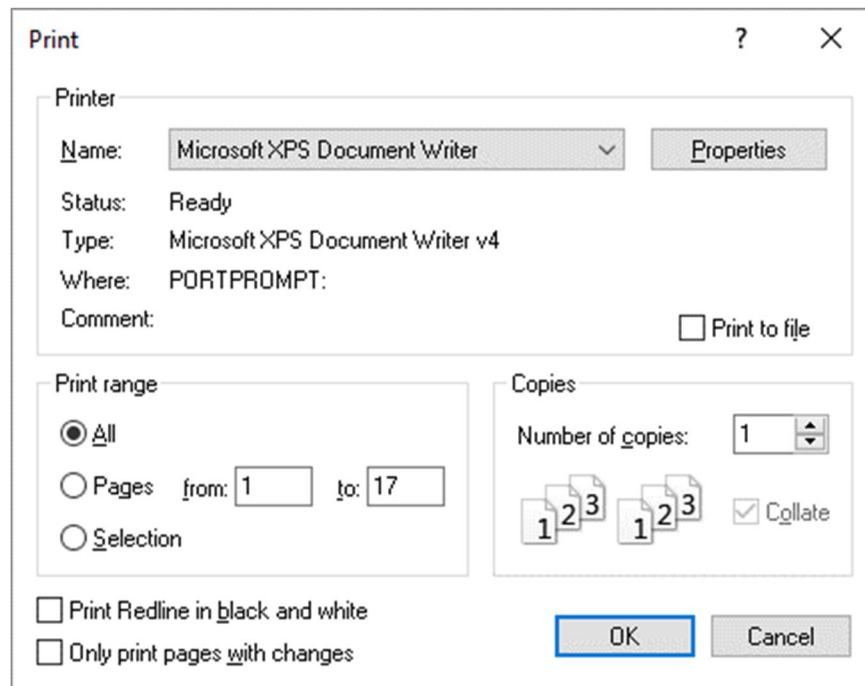
Printing redlines

You can print the entire redline or just the pages that have changes, as well as either of the source documents.

To print the comparison documents:

1. Click **Print** in the **Home** tab (or File menu) and then one of the following options:
   - **Comparison only**
   - **Comparison + Modified**
   - **Comparison + Modified + Original**

   The *Print* dialog is displayed.

2. Select from the standard print options in the usual way.

3. If you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as color text may not appear clearly when printing in black and white.

4. If you only want to print pages of the redline that include changes, select the **Only print pages with changes** checkbox.

5. Click **OK**.

*Note: You can preview the printed version of the redline, original or modified document using the **Print Preview** options in the File menu.*

Converting redline to PDF

You can convert the redline to PDF and save it locally or in your DMS or you can attach the PDF to an email and send.

To convert a redline to PDF:

1. Click **PDF** in the **Home** tab. The *Convert to PDF* dialog is displayed.

Note: This dialog displays slightly differently depending on whether you are working with a document saved in your DMS/CRM.

2. Select whether you want to convert the redline to **PDF** or **PDF/A**.

3. If required, click **Configure PDF Security** to set PDF security options as well as metadata cleaning options. The following dialog is displayed.

4. If you selected **PDF**, you can select one or more of the security options as required:
   - **Prevent printing:** Prevents recipients from printing the PDF document.
   - **Prevent editing of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
   - **Prevent the copying of text and/or graphics:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prevent comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.

5. If you selected **PDF** or **PDF/A**, click **Cleaning Options** to specify what metadata to remove before converting the redline to PDF.
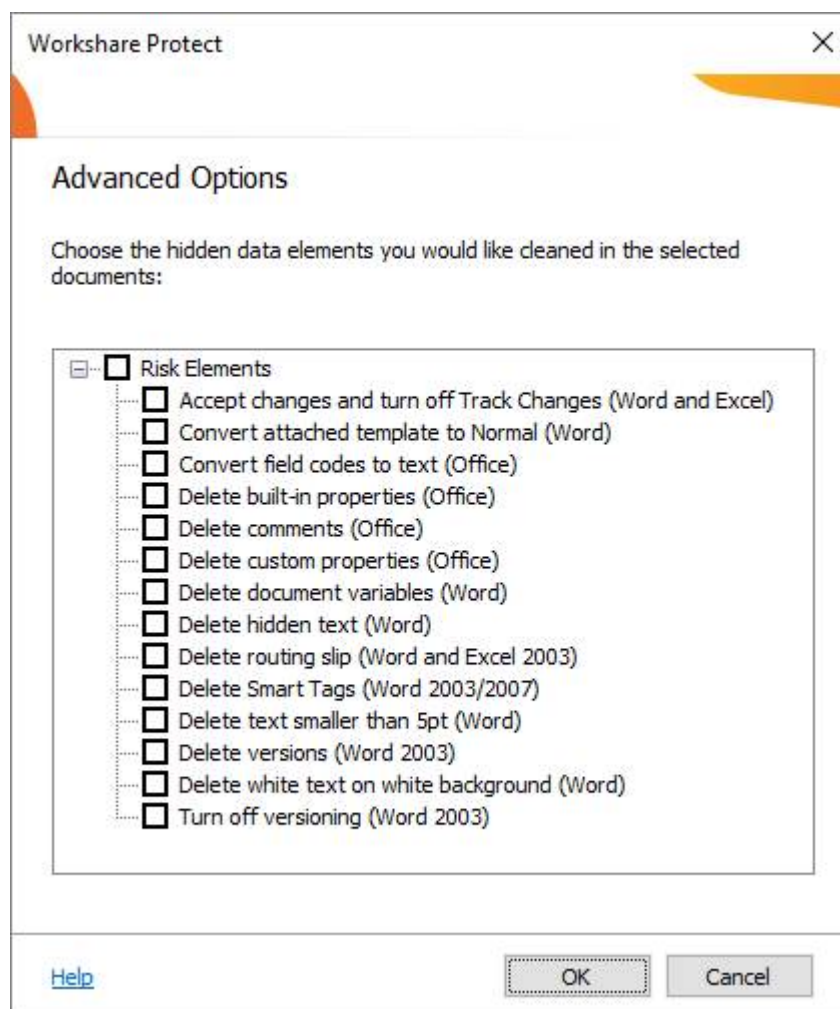
6. Select metadata elements as required. For a full description of all the metadata elements, refer to *Cleaning Hidden Data*.

7. Click **OK**.

8. If you selected **PDF**, you can set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, the recipient can only open the PDF after entering this password.

9. Click **Apply**.

10. In the *Convert to PDF* dialog, when working with a DMS, select whether to save the PDF as a new document or as a related document or locally.

11. If you want to create a PDF of part of the redline only, select the **Pages** radio button and specify a page range.

> *Note: You can also PDF individual pages by specifying the pages (separated by commas) in the **Pages** field.*

12. If required, click **Preview** to view the document as a PDF.

13. To open the PDF once it has been created, select the **Open PDF once created** checkbox.

14. To attach the PDF to a new email message once it has been created, select the **Email PDF as an attachment** checkbox.

15. Click **Create**. The *Save as* dialog is displayed.

16. Specify the name and location for the PDF file and click **Save**. The redline is converted to PDF.

Chapter 3:   Comparing Presentations

This chapter describes Workshare Compare for PowerPoint, a standalone application that enables you to compare two presentations. It includes the following sections:

- **Introducing Compare for PowerPoint**, page 77, introduces the Workshare Compare for PowerPoint application and explains how to launch it.

- **Comparing Presentations**, page 77, describes how to compare a presentation against an earlier version of the presentation or against a different presentation using Workshare Compare for PowerPoint.

- **Workshare Compare for PowerPoint Main Windo**w, page 84, describes the Workshare Compare for PowerPoint environment and provides an overview of the functionality available.

- **Working with Comparisons**, page 90, describes the tools available to you when working with the compared presentation after a comparison.

Introducing Compare for PowerPoint

> **Note:** *This chapter describes how to compare PowerPoint presentations. The comparison of Word documents and PDF files is described in Chapter 2 and the comparison of Excel spreadsheets is described in Chapter 4.*

Workshare Compare for PowerPoint is a presentation comparison tool designed to make the process of editing and revising presentations as fast and efficient as possible. Workshare Compare for PowerPoint enables you to compare Microsoft PowerPoint presentations and immediately see any differences between them. In one view, you can see both the original and modified presentations with the differences clearly marked as well as a written summary of the changes and color-coded thumbnails of the slides showing which slides were modified, deleted, and inserted. Presentations stored in your DMS or CRM, locally or on your network can be compared.

To make the review easier, you can select different "comparison themes" to define exactly what is compared as well as how changes are displayed.

What is compared?

Workshare Compare for PowerPoint provides a comprehensive comparison of two Microsoft PowerPoint presentations and can detect the following changes:

- Slide moves, insertions and deletions
- Text moves, insertions and deletions
- Text formatting changes
- Image and object content changes
- Text box changes
- Hyperlink changes
- Speaker note changes
- Slide background changes

Comparing Presentations

You can compare your original presentation against a previous version of the presentation or against another presentation entirely. For example, there may be ten versions of a presentation in your DMS. You can open version 10 and compare it against version 5.

You can launch Workshare Compare for PowerPoint and perform comparisons from within Microsoft PowerPoint, from your desktop, from right-click options or from an email and each of these scenarios is described in the following sections.

Launching PowerPoint comparisons from Microsoft PowerPoint

In this scenario, you first open your presentation in Microsoft PowerPoint.

To compare presentations:

Click **Compare** in the *Workshare* tab. The *Select Presentations for Comparison* dialog is displayed with the open presentation in the **Modified Presentation** field. Select the presentation to compare it against as described in Launching PowerPoint comparisons from your desktop.

*Note: The **Compare** button may also be available in the Litera ribbon if configured (in the **General > User Interface** category in the Workshare Configuration Manager).*

Launching PowerPoint comparisons using right-click options

You can launch Workshare Compare for PowerPoint by right-clicking presentations in File Explorer or in your DMS (iManage FileSite/DeskSite and OpenText).

- Right-click the original presentation and select **Compare with Workshare**. The *Select Presentations for Comparison* dialog is displayed with the selected presentation in the **Original Presentation** field. Select the file to compare it against as described in *Launching PowerPoint comparisons from your desktop*.

- Select the original and modified presentations, right-click and select **Compare with Workshare**. The *Select Presentations for Comparison* dialog is displayed with the selected presentations in the **Original Presentation** and **Modified Presentation** fields. Continue as described in *Launching PowerPoint comparisons from your desktop*.

Note: You cannot launch Workshare Compare for PowerPoint from SharePoint or Worldox using right-click options, from NetDocuments using Send to Application, or from the iManage Work 10 browser interface using the kebab (context) menu.

# Launching PowerPoint comparisons from email

You can launch Workshare Compare for PowerPoint from the dropdown context menu of an attachment to an email or using the Compare button in the Workshare tab.

- Select one (or two attachments), click the dropdown and click **Compare with Workshare**.
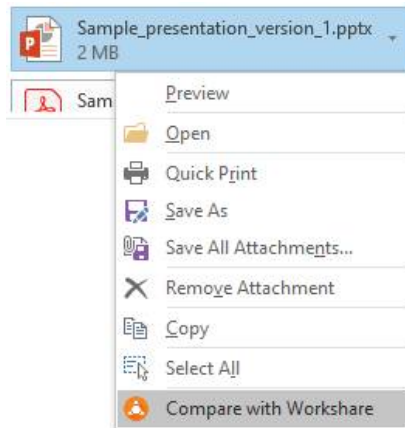
The *Select Presentations for Comparison* dialog is displayed with the attachment in the **Modified Presentation** field. Continue as described in *Launching PowerPoint comparisons from your desktop*.

- With an email selected in your inbox, click **Compare** in the *Workshare* tab. If the email doesn't include attachments, the **Compare** button is disabled. If the email includes one or two PowerPoint attachments, the *Select Presentations for Comparison* dialog is displayed with the attachments selected. If the email contains more than two attachments, the following dialog is displayed:
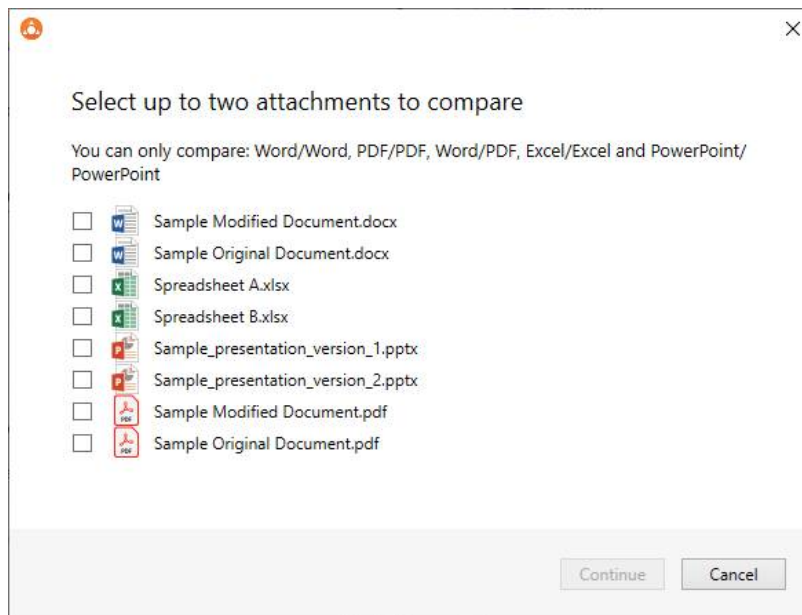
*Note: The **Compare** button may also be available in the Litera ribbon if configured (in the **General > User Interface** category in the Workshare Configuration Manager).*

Select the attachments you want to compare and click **Continue**. The *Select Presentations for Comparison* dialog is displayed with the attachments selected. Continue as described in *Launching PowerPoint comparisons from your desktop*.

*Note: If you select attachments that can't be compared for example, a DOCX and an PPTX, the **Continue** button will be disabled.*

Launching PowerPoint comparisons from your desktop

In this scenario, you launch Workshare Compare for PowerPoint as a standalone application from your desktop or the Start menu. You then select the presentations you want to compare.

To compare presentations:

1. Double-click the Workshare Compare for PowerPoint shortcut on your desktop or select **Workshare Compare for PowerPoint** from the Start menu. The *Select Presentations for Comparison* dialog is displayed:
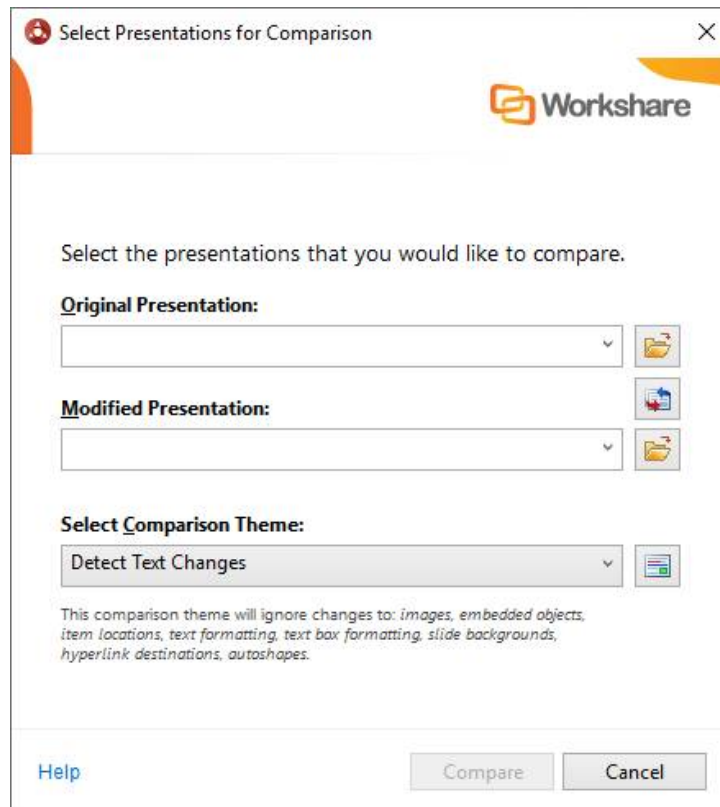
> *Note: Click **Cancel** if you want to close the Select Presentations for Comparison dialog without running a comparison. For example, if you just want to open the Workshare Compare for PowerPoint window in order to open a previously saved comparison.*

2. Select the original presentation you want to compare:

   ▫ Drag the file over the **Original Presentation** field, or

   ▫ Click [icon] to the right of the **Original Presentation** field, navigate to the presentation location in your local file system, SharePoint or DMS/CRM and click **Open**.

   The selected presentation is displayed in the **Original Presentation** field.

> *Tip! If you want to compare a recently used file, click the dropdown [icon] in the **Original Presentation** and **Modified Presentation** fields and select the presentations you want to compare. These lists contain the last 8 files you have used.*
>
> *When working with iManage, and the selected file has versions, the recent files list can also include these versions. In this way, you can easily compare different versions of your iManage presentations.*

3. Select the presentation you want to compare with the original presentation:

   ▫ Drag the file over the **Modified Presentation** field, or

   ▫ Click [icon] to the right of the **Modified Presentation** field, navigate to the presentation location in your local file system, SharePoint or DMS/CRM and click **Open**.

   The selected presentation is displayed in the **Modified Presentation** field.

> *Tip! To swap the original and modified presentations, click [icon].*

4. From the **Select Comparison Theme** dropdown list, select the comparison theme you want to use. Comparison themes contain a set of parameters that define exactly what is compared as well as how changes are displayed. You can select from the standard comparison themes provided with Workshare Compare for PowerPoint or you can create and customize your own comparison themes. Refer to *Introducing Comparison Themes* for further information.

> ***Note:** Clicking* [icon] *to the right of the* **Select Comparison Theme** *field displays the Comparison Themes Manager where you can create, modify and delete comparison themes. For a full description refer to* Appendix B: Configuring Comparison Themes.

5. Click **OK**. The comparison process is launched and a progress dialog is displayed.

When the comparison is complete, the Workshare Compare for PowerPoint window is displayed showing the changes between the selected presentations. For a full description of the Workshare Compare for PowerPoint interface, refer to *Workshare Compare for PowerPoint Main Window.* For a description of how to navigate between the changes and review the changes in your compared presentations, refer to *Working with Comparisons.*

Workshare Compare for PowerPoint from the command line

Comparisons can be run from the command line. Running **DeckCompare.exe /?** displays a summary of the available command line options when the program starts up.
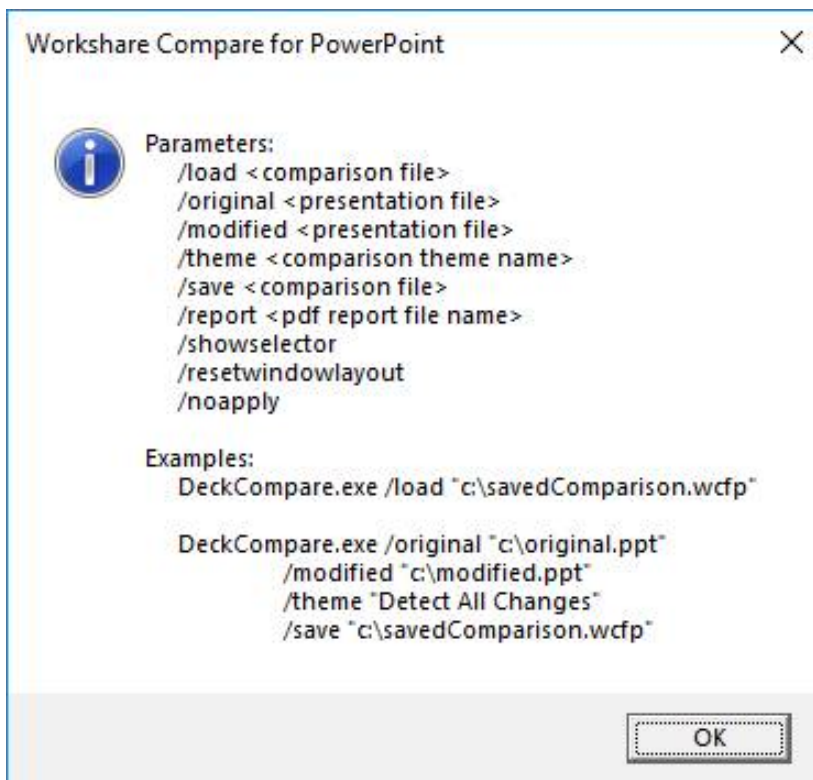
The command line parameters are as follows:

Parameter	Definition
/load <file>	Loads an existing comparison file (*.wcfp).
/original <file>	Selects an existing original presentation file for comparison.
/modified <file>	Selects an existing modified presentation file for comparison.
/theme <name>	Selects the named comparison theme.
/save<file>	For an initial comparison from the command line, specifies a file to save the comparison to.
/report <file name>	Creates a report of the comparison that includes the original and modified slide as well as a list of the changes per slide pair.
/showselector	Displays the *Select Presentations for Comparison* dialog enabling you to perform a new comparison.
/resetwindowlayout	Displays the main window in its default layout.
/noapply	Turns off the apply change functionality for the comparison.
/?	Shows the command line options.

If /load is used, or both /original and /modified, the *Select Presentations for Comparison* dialog is bypassed. Otherwise, the dialog is pre-populated with whichever of /original, /modified and /theme are specified.

Workshare Compare for PowerPoint Main Window

The Workshare Compare for PowerPoint main window enables you to view the results of a comparison between an original presentation and a modified presentation. You can view (in one work area) both source presentations, slide thumbnails and a summary of the changes between the two source presentations.
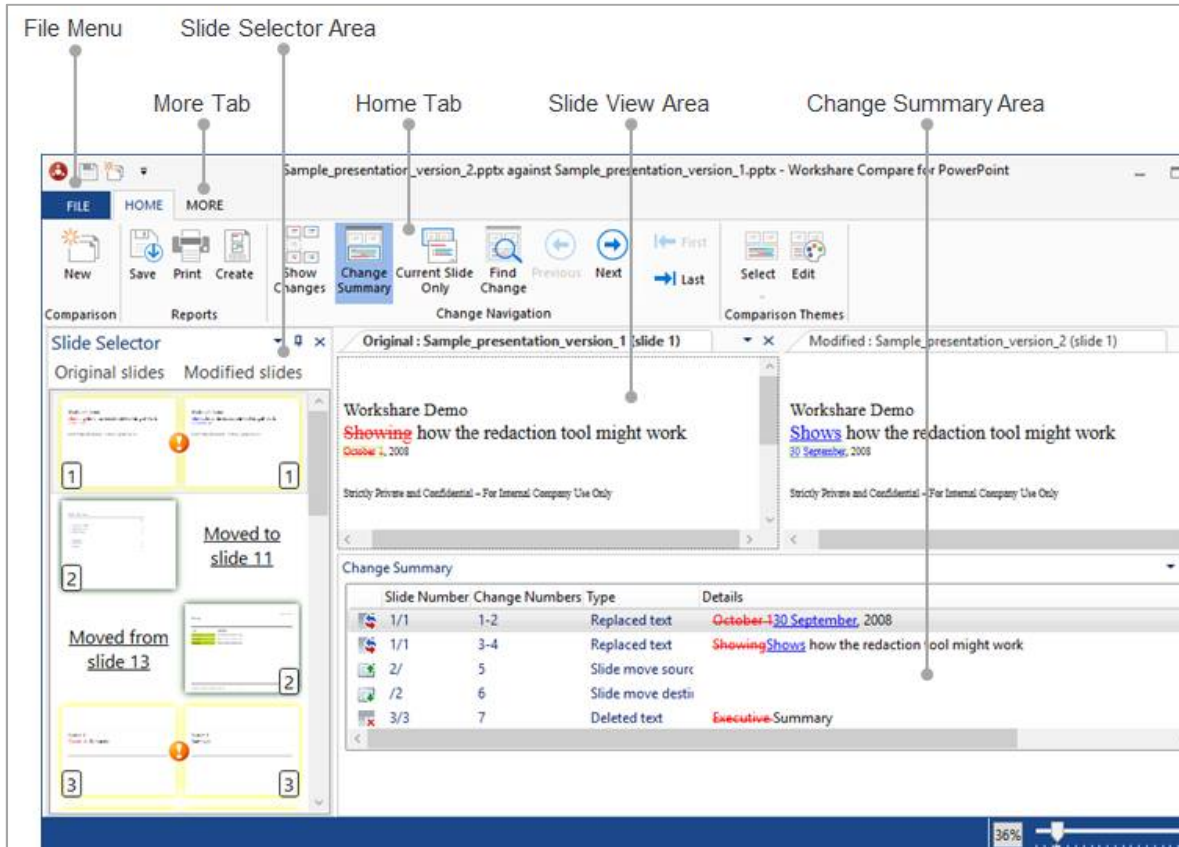
The ribbon changes according to the selected tab. In the above example, the Home tab is selected so the Home ribbon is displayed.

The different areas of the Workshare Compare for PowerPoint work area are described in the following sections.

File menu

The File menu includes the following options:

Option	Description
Open	Enables you to open a saved comparison. Comparisons are saved as Workshare .wcfp files. Refer to *Opening saved Workshare Compare for PowerPoint files*.
Save	Enables you to save the current comparison. Refer to *Saving comparisons*.
Save As	Enables you to save a saved comparison with a new name.
Print	Enables you to print a comparison report showing the changes found by the comparison. Refer to *Printing comparison reports*.
About	Displays version information about Workshare Compare for PowerPoint.
Exit	Closes Workshare Compare for PowerPoint.

Quick access toolbar

The quick access toolbar provides one-click access to functionality. By default, the **Save** and **New** buttons are available. Click the arrow to the right of the quick access toolbar and select **Minimize the Ribbon** to hide the ribbon.

*Note: To change the commands that appear in the quick access toolbar, right-click in the ribbon and select **Customize Quick Access Toolbar**.*

Home tab

The Home ribbon enables you to move between slides and changes, as well as apply and edit comparison themes.
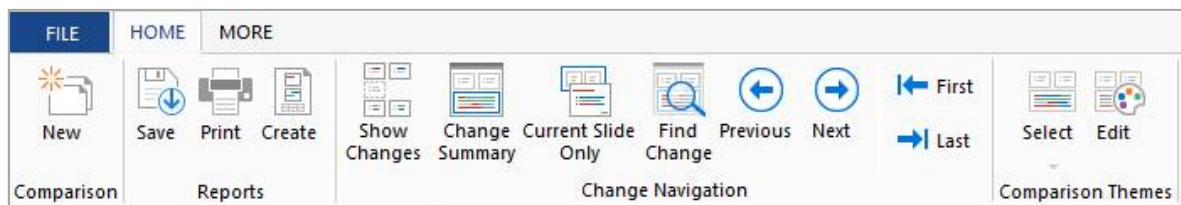
The options are described in the following table.

Section	Option	Description
Comparison	New	Opens the *Select Presentations for Comparison* dialog enabling you to perform a new comparison. Refer to *Comparing Presentations*.
Reports	Save	Enables you to save the current comparison as a PDF or WCFP file. Refer to *Saving comparisons*.
	Print	Enables you to print a comparison report showing the changes found by the comparison. Refer to *Printing comparison reports*.
	Create	Enables you to create a comparison report showing the changes found by the comparison. Refer to *Creating comparison reports*.
Change Navigation	Show Changes	Displays only slides that include changes, hiding those slides that have not changed.
	Change Summary	Displays/hides the Change Summary area. Refer to *Change Summary area*.
	Current Slide Only	Displays only changes relating to the currently displayed slide in the Change Summary area.
	Find Change	Enables you to search for specific text in the Change Summary area. Refer to *Searching changes*.
	Previous	Navigates to the previous change in the Change Summary area. The change in also highlighted in the Slide View area. Refer to *Navigating between changes*.
	Next	Navigates to the next change in the Change Summary area. The change in also highlighted in the Slide View area. Refer to *Navigating between changes*.
	First	Navigates to the first change in the Change Summary area. The change in also highlighted in the Slide View area. Refer to *Navigating between changes*.
	Last	Navigates to the last change in the Change Summary area. The change in also highlighted in the Slide View area. Refer to *Navigating between changes*.
Comparison Themes	Select	Enables you to select an alternative comparison theme from the dropdown list. This comparison theme is then applied to the current comparison. Refer to *Applying Comparison Themes*.

Section	Option	Description
	Edit	Opens the Comparison Themes Manager from where you can modify existing comparison themes as well as create new comparison themes. Refer to *Customizing Comparison Themes*.

More tab

The More ribbon enables you to change the display of the different areas in the main window.
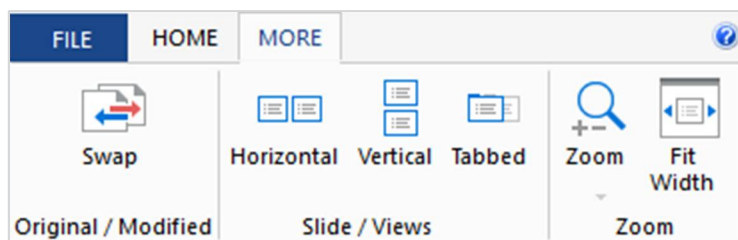
The options are described in the following table.

Section	Option	Description
Original/ Modified	**Swap**	Swaps the original and modified presentations and re-runs the comparison. Refer to *Swapping the source files*.
Slide/Views	**Horizontal**	Displays the original and modified presentations side by side in the Slide View area.
	Vertical	Displays the original presentation above the modified presentation in the Slide View area.
	Tabbed	Displays the original and modified presentations in tabs in the Slide View area.
Zoom	**Zoom**	Enables you to change the magnification of the original and modified presentations in the Slide View area. There are also zoom controls on the right side of the status bar.
	Fit Width	Fits the original and modified presentations to the width of the Slide View area.

Slide Selector area

The Slide Selector area displays thumbnail images of the slides in the original and modified presentations. The slides have different colored borders so you can see at a glance when a new slide has been inserted or a slide has been deleted or includes changes. The border colors are as follows:

Yellow   The content of the slide has changed.

Green   The slide has moved its position (the new position is indicated).

Red   The slide has been deleted.

Blue   The slide is a new inserted slide.

Slides that have not changed in any way have no colored border.

In addition, the following icons in between the slide pairs indicate which slide pairs are different and which are the same:

🟢   Both slides in the slide pair are the same.

🟠   There are differences between the slides in the slide pair.

The slides currently selected in the Slide Selector area are displayed in the Slide View area.

The Slide Selector area is by default positioned down the left side of the Workshare Compare for PowerPoint environment. It can also float over the other windows. Click the ▾ and select from the following options:
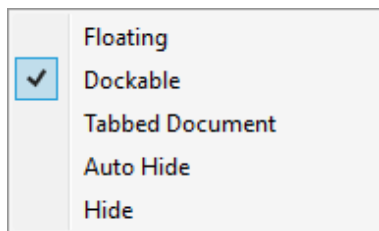

Tip! *You can also use the* 📌 *to auto-hide the Slide Selector area.*

Slide View area

The Slide View area displays both presentations that have been compared and clearly indicates the changes on each. The presentations are synchronized so that if you select a particular slide in the Slide Selector area or a particular change in the Change Summary area then that slide or change is shown in both the original and modified presentations.

Changes are marked according to the comparison theme applied to the comparison. For example, deleted text could be ~~red and struck through~~ and added text could be <u>blue and underlined</u>.

Change Summary area

The Change Summary area provides a list of all the changes between the original and modified presentations in the order that they occur. Changes can be displayed for all slides or on a slide by slide basis. Selecting a change in the Change Summary area displays the slides that include the change in the Slide View area and highlights the slides in the Slide Selector area. The change that is selected is highlighted in light green in the Slide View area.

The color and formatting of the change in the Change Summary area and in the Slide View area is determined by the comparison theme applied to the comparison. For a full description of comparison themes, refer to *Introducing Comparison Themes*.

You can select changes in the Change Summary area using the mouse or using buttons in the Home tab.

The following information is shown for each change in the Change Summary area:

Slide Number	The number of the original slide and the number of the modified slide in the comparison.
Change Numbers	The number of the change in the comparison. A change may have two numbers when it includes two actions. For example, a deletion and an addition.
Type	The type of change, such as replaced text, deleted text box, moved slide.
Details	Details of the change.

The icons to the left of each change indicate the type of change as follows:

	Replacements		Formatting changes
	Insertions		Slide move source
	Deletions		Slide move destination

The Change Summary area is by default positioned across the bottom of the Workshare Compare for PowerPoint environment. It can also float over the other windows. Click the and select from the following options:

Floating

✓ Dockable

Tabbed Document
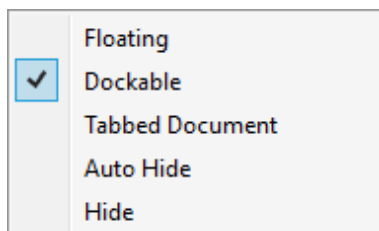
Auto Hide

Hide

Tip! You can also use the to auto-hide the Change Summary area.

Working with Comparisons

Navigating changes

After performing a comparison, you can review the result of the comparison and consider the changes between the original and modified presentations. You can move between changes by navigating between slides or by navigating between changes. All areas of the Workshare Compare for PowerPoint window are synchronized.

Navigating between slides

Clicking slides in the Slide Selector area displays the selected slides in the Slide View area and shows the changes relating to that slide in the Change Summary area.
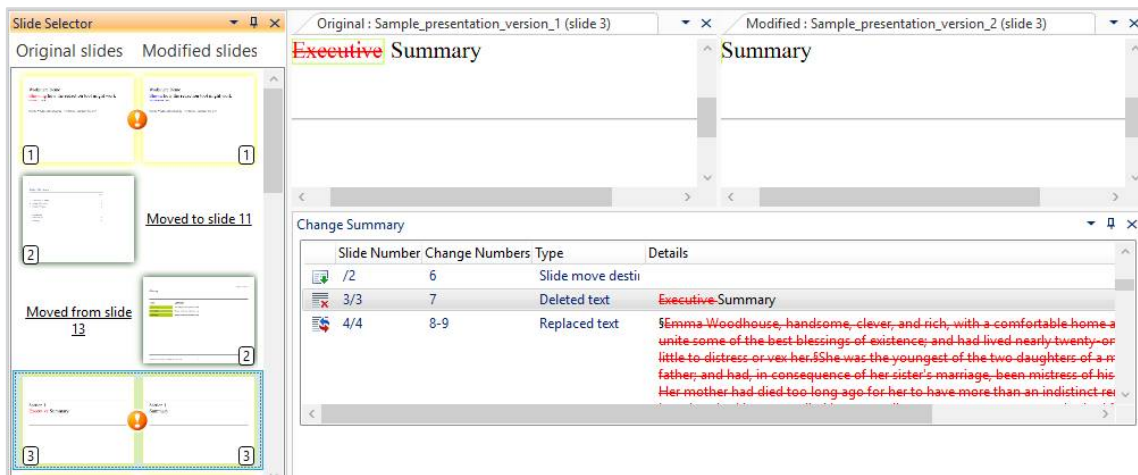
The following icons in between the slide pair in the Slide Selector area indicate whether the slide has changed or not:

🟢   The slide has not changed.

🟠   The slide has changed.

In addition, the thumbnail images of the slides in the Slide Selector area have different colored borders so you can see at a glance when a new slide has been inserted or a slide has been deleted or a slide includes changes. The border colors are as follows:
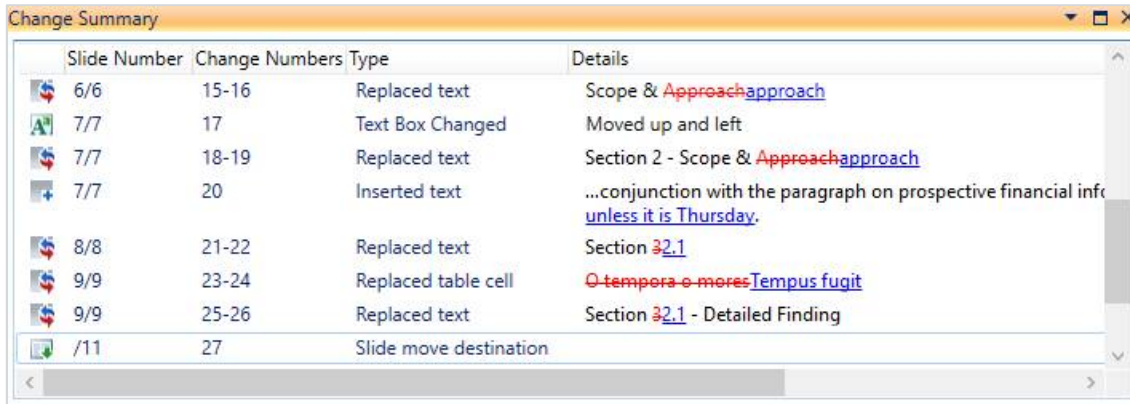
Yellow   The content of the slide has changed.

Green   The slide has moved its position (the new position is indicated).

Red   The slide has been deleted.

Blue   The slide is a new inserted slide.

Slides that have not changed in any way have no colored border.

Navigating between changes

Clicking a change in the Change Summary area displays the slides that include the change in the Slide View area and highlights the slides in the Slide Selector area. The change that is selected is highlighted in light green in the Slide View area.

The color and formatting of the change in the Change Summary area and in the Slide View area is determined by the comparison theme applied to the comparison. For a full description of comparison themes, refer to *Introducing Comparison Themes*.

You can also move between changes in the Change Summary area using the **First**, **Last**, **Previous** and **Next** buttons in the **Change Navigation** group of the Home tab.

*Note: By default, the Change Summary area provides a list of all changes occurring on all slides in the compared presentations. If you want to display just the changes that occur on the displayed slide, click the **Current Slide Only** button in the **Change Navigation** group of the Home tab.*

The Change Summary area indicates the type of change as well as details of the change itself, such as the specific text that has been inserted or deleted.

Searching changes

You can search for specific text in the Change Summary area. Workshare Compare for PowerPoint can search all text in the Change Summary area or just the text that has been changed (inserted, deleted or moved).

To search changes:

1. Click the **Find Change** button in the **Change Summary** group of the Home tab. The *Find Changes* dialog is displayed.
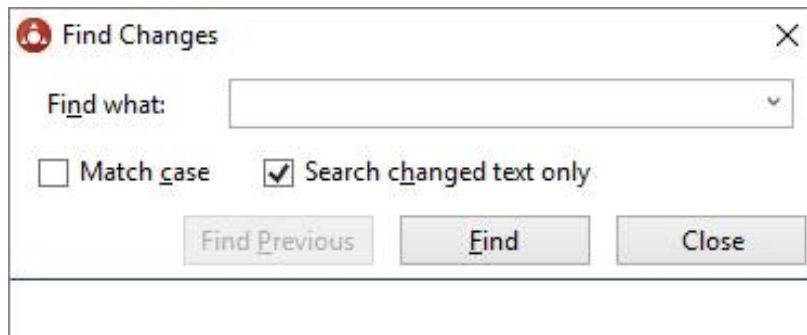
2. In the **Find what** field, enter the text that you want to look for.

3. Select the **Match case** checkbox if you want to search for identical text in the same case.

4. Select the **Search changed text only** checkbox if you want to search only the text that has been changed.

5. Click **Find**. Workshare Compare for PowerPoint searches for the specified text. When it is found, the text is highlighted in the Change Summary area and the relevant slide is shown in the Slide Selector area and Slide View area.

6. Click **Find Next** to search for further occurrences of the specified text. Click **Find Previous** to return to the previously found instance.

7. Click **Close** to close the *Find Changes* dialog.

Swapping the source files

You can re-run a comparison exchanging the original presentation for the modified presentation and vice versa. For example, if you selected Presentation A as the original presentation and Presentation B as the modified presentation, Workshare Compare for PowerPoint shows the changes made to Presentation A to produce Presentation B. You can then swap the presentations so that Presentation B is now the original and Presentation A is the modified presentation. Workshare Compare for PowerPoint automatically re-runs the comparison and shows the changes made to Presentation B to produce Presentation A.

To swap the source presentations:

Click **Swap** in the More tab. Workshare Compare for PowerPoint automatically runs a new comparison, using the modified presentation as the original presentation and the original presentation as the modified presentation. The new comparison is displayed in the Workshare Compare for PowerPoint window replacing the previous comparison.

Saving comparisons

You can save a comparison as a PDF file or a WCPF (Workshare Compare for PowerPoint) file in your DMS or CRM, locally or on your network.

The PDF file can include the original and modified slides and/or a list of the changes per slide pair. It can also just include the slides that have changes.

> *Note: The layout and contents of the saved PDF are determined by the **Compare for PowerPoint – Default report layout** and **Compare for PowerPoint – Include unchanged slides** parameters (**Comparison > Administration** category) in the Workshare Configuration Manager.*

The WCPF file can be opened in Workshare Compare for PowerPoint.

To save a comparison:

1. Click **Save** in the Home tab, the menu or quick access toolbar. The *Save As* dialog is displayed.

2. Select whether to save the comparison as a WCFP or PDF file.

3. Navigate to the location where you want to save the file and enter a name for the file.

4. Click **Save**.

> *Note: If you work with Workshare online, you can also use Save As and save the comparison to your Workshare sync folder and it will be synchronized to Workshare online. Refer to* Adding files to Workshare*.*

Opening saved Workshare Compare for PowerPoint files

When a comparison has been saved as a Workshare Compare for PowerPoint file, you can open it from the Workshare Compare for PowerPoint main window.

To open a saved comparison:

1. Click **Open** in the File menu. An *Open* dialog is displayed.

> ***Note:*** *If Workshare Compare for PowerPoint is not open, launch it in the usual way and click **Cancel** in the Select Presentations for Comparison dialog so that no initial comparison is performed and a blank Workshare Compare for PowerPoint main window is displayed.*

2. Navigate to the location where the comparison is saved and select the .wcfp file you want to open.

3. Click **Open**. The selected comparison is opened in Workshare Compare for PowerPoint.

Creating comparison reports

After you have run a comparison, you can create a report showing the changes found by the comparison. The PDF comparison report can include both the original and modified slides as well as a list of changes per slide pair or you can select to include just the slide pair or just the list of changes.

To create a comparison report:

1. Click **Create** in the Home tab. The *Create Comparison Report* dialog is displayed.
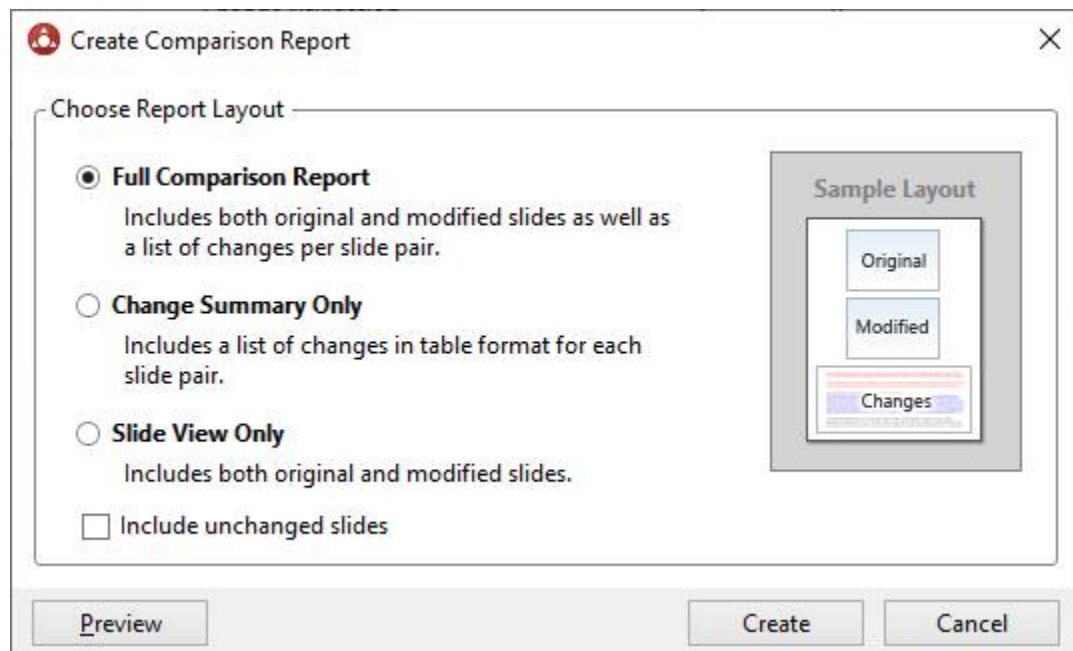
2. In the **Choose Report Layout** area, select what you want to include in the report by selecting one of the following options:

   ▫ **Full Comparison Report**: Includes the original and modified slide as well as a list of the changes per slide pair.

   ▫ **Change Summary Only**: Includes the list of changes in table format for each slide pair.

   ▫ **Slide View Only**: Includes the original and modified slides.

3. Select the **Include unchanged slides** checkbox if you also want to include in the report slide pairs that didn't have changes.

> *Note: To display the selected comparison report, click **Preview**.*

4. Click **Create**.

5. In the save dialog, browse to a save location and enter a name for the report.

6. Click **Save**. The comparison report is generated and saved as a PDF in the specified location.

Printing comparison reports

After you have run a comparison, you can print a report showing the changes found by the comparison. The comparison report can include both the original and modified slides as well as a list of changes per slide pair or you can select to include just the slide pair or just the list of changes.

If you have created a comparison report already and saved it as a PDF (as described in *Creating comparison reports*) you can simply print the PDF in the usual way. The following procedure describes how to create and print a comparison report in one step.

To print a comparison report:

1. Click **Print** in the Home tab or File menu. The *Print Comparison Report* dialog is displayed.

2. In the **Choose Report Layout** area, select what you want to include in the report by selecting one of the following options:

   ▫ **Full Comparison Report**: Includes the original and modified slide as well as a list of the changes per slide pair.

   ▫ **Change Summary Only**: Includes the list of changes in table format for each slide pair.

   ▫ **Slide View Only**: Includes the original and modified slides.

3. Select the **Include unchanged slides** checkbox if you also want to include in the report slide pairs that didn't have changes.

4. In the **Printer** area, select which printer to use.

5. In the **Print Range** area, select whether to include all slides or selected slides.

6. In the **Copies** area, enter how many copies of the comparison report you want to print and select the **Collate** checkbox if collating of multiple copies is required.

> *Note:* To display the selected comparison report, click **Preview**. Note that the full report is displayed for preview even if a page range has been specified.

7. Click **OK**. The comparison report is created and printed as specified.

Chapter 4:   Comparing Spreadsheets

This chapter describes Workshare Compare for Excel, a standalone application that enables you to compare two spreadsheets. It includes the following sections:

- **Introducing Compare for Excel**, page 98, introduces the Workshare Compare for Excel application and explains how to launch it.

- **Comparing Spreadsheets**, page 98, describes how to compare a spreadsheet against an earlier version of the spreadsheet or against a different spreadsheet using Workshare Compare for Excel.

- **Workshare Compare for Excel Main Windo**w, page 110, describes the Workshare Compare for Excel environment and provides an overview of the functionality available.

- **Understanding Changes**, page 113, describes how changes are displayed in the comparison.

- **Rendering Sets in Compare for Excel**, page 119, describes how to create and modify the rendering sets applied to spreadsheet comparisons.

- **Working with Comparisons**, page 124, describes the tools available to you when working with the compared spreadsheet after a comparison.

Introducing Compare for Excel

Note: This chapter describes how to compare Excel spreadsheets. The comparison of Word documents and PDF files is described in Chapter 2 and the comparison of PowerPoint presentations is described in Chapter 3.

Workshare Compare for Excel is a spreadsheet comparison tool designed to make the process of editing and revising spreadsheets as fast and efficient as possible. Workshare Compare for Excel enables you to compare Microsoft Excel spreadsheets and immediately see any differences between them. The differences between each cell are clearly marked and a detailed summary of the change provided in a panel. To make the review easier, you can customize how the changes are highlighted within the comparison. Spreadsheets stored in your DMS or CRM, locally or on your network can be compared.

What is compared?

Workshare Compare for Excel provides a comprehensive comparison of two Microsoft Excel presentations and can detect the following changes:

- Cell insertions and deletions
- Cell merges and splits
- Changes to number values
- Text changes
- Changes to formulas
- Number format changes
- Changes to visual formatting in cells
- Changes to font formatting

Comparing Spreadsheets

You can compare your original spreadsheet against a previous version of the spreadsheet or against another spreadsheet entirely. For example, there may be ten versions of a spreadsheet in your DMS. You can open version 10 and compare it against version 5.

You can launch Workshare Compare for Excel and perform comparisons from within Microsoft Excel, from your desktop, from right-click options or from an email and each of these scenarios is described in the following sections.

Launching Excel comparisons from Microsoft Excel

In this scenario, you first open your spreadsheet in Microsoft Excel.

To compare spreadsheets:

Click **Compare** in the *Workshare* tab. The file selection dialog is displayed with the open spreadsheet in the **Modified** field. Select the spreadsheet to compare it against as described in *Launching Excel comparisons from your desktop*.

*Note: The **Compare** button may also be available in the Litera ribbon if configured (in the **General > User Interface** category in the Workshare Configuration Manager).*

Launching Excel comparisons using right-click options

You can launch Workshare Compare for Excel by right-clicking presentations in File Explorer or in your DMS.

- Right-click the original spreadsheet and select **Compare with Workshare**. The file selection dialog is displayed with the selected spreadsheet in the **Original** field. Select the file to compare it against as described in *Launching Excel comparisons from your desktop*.

- Select the original and modified spreadsheets, right-click and select **Compare with Workshare**. The file selection dialog is displayed with the selected spreadsheets in the **Original** and **Modified** fields. Continue as described in *Launching Excel comparisons from your desktop*.

Note: You cannot launch Workshare Compare for Excel from SharePoint using right-click options, or from the iManage Work 10 browser interface using the kebab (context) menu.

Launching Excel comparisons from email

You can launch Workshare Compare for Excel from the dropdown context menu of an attachment to an email or using the Compare button in the Workshare tab.

- Select one (or two attachments), click the dropdown and click **Compare with Workshare**.
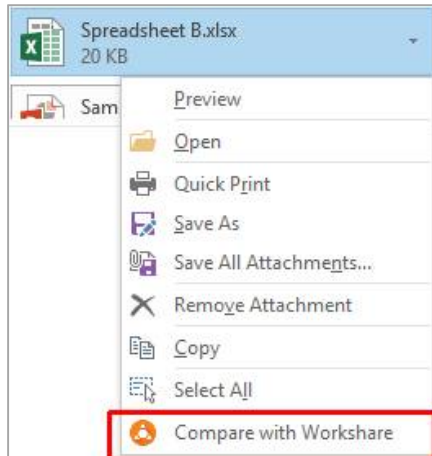
The file selection dialog is displayed with the selected spreadsheet in the **Modified** field. Continue as described in *Launching Excel comparisons from your desktop*.

- With an email selected in your inbox, click **Compare** in the *Workshare* tab. If the email doesn't include attachments, the **Compare** button is disabled. If the email includes one or two Excel attachments, the file selection dialog is displayed with the attachments selected. If the email contains more than two attachments, the following dialog is displayed:
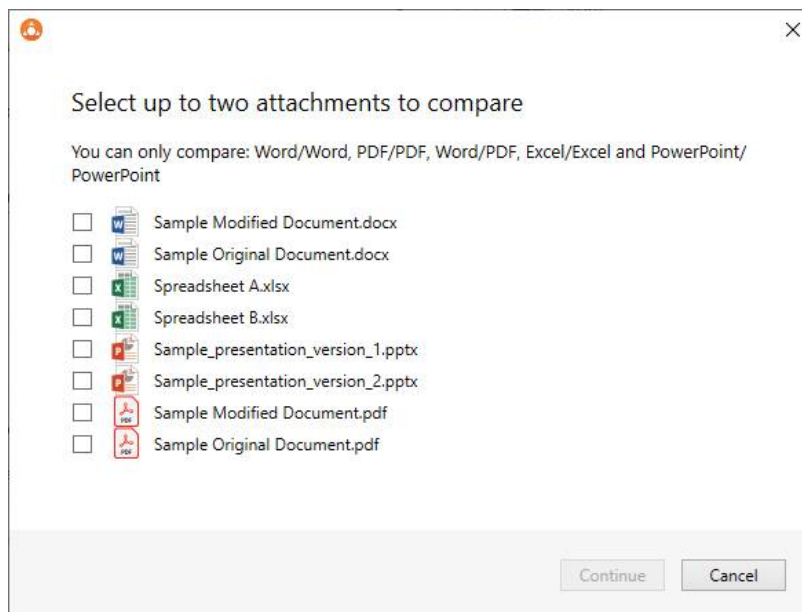
> *Note*: The **Compare** button may also be available in the Litera ribbon if configured (in the **General > User Interface** category in the Workshare Configuration Manager).

Select the attachments you want to compare and click **Continue**. The file selection dialog is displayed with the attachments selected. Continue as described in *Launching Excel comparisons from your desktop*.

> *Note*: If you select attachments that can't be compared for example, a DOCX and an XLSX, the **Continue** button will be disabled.

Launching Excel comparisons from your desktop

In this scenario, you launch Workshare Compare for Excel as a standalone application from your desktop or the Start menu. You then select the spreadsheets you want to compare.

To compare spreadsheets:

1. Double-click the Workshare Compare for Excel shortcut on your desktop or select **Workshare Compare for Excel** from the Start menu. The file selection dialog is displayed:
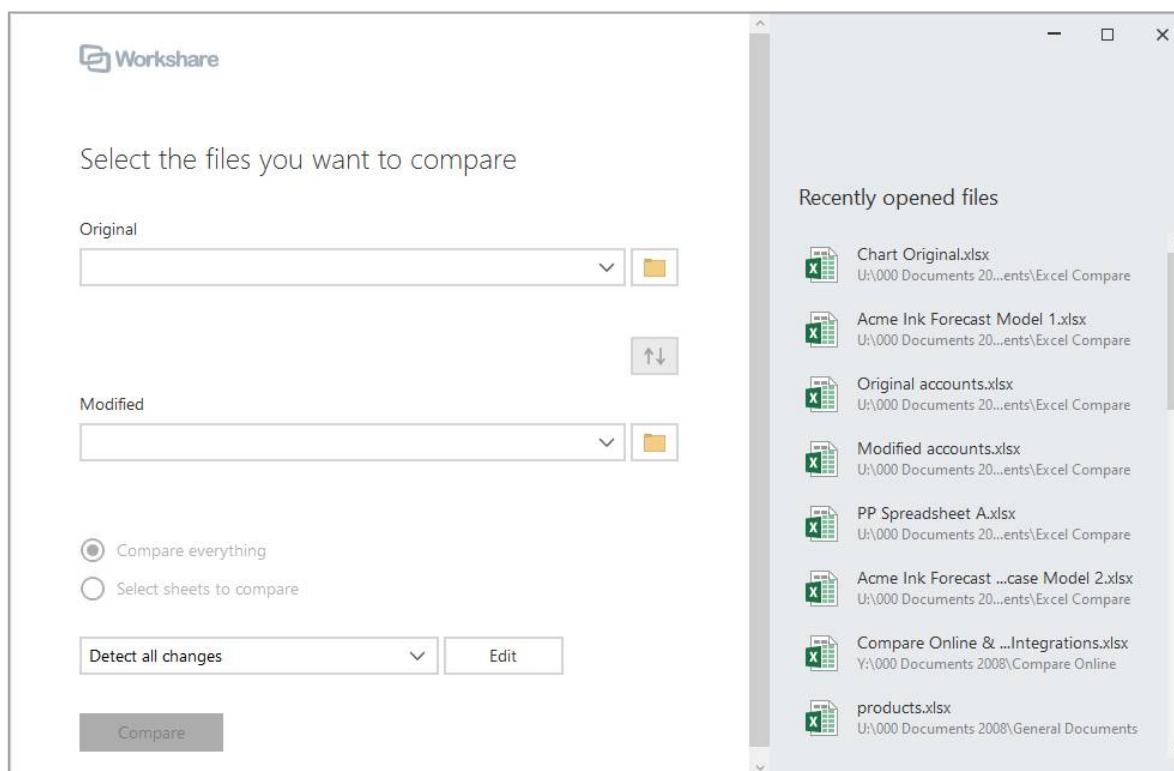
2. Select the original spreadsheet you want to compare:

   ▫ Drag the file over the **Original** field, or

   ▫ Click [icon] to the right of the **Original** field, navigate to the spreadsheet location in your local file system, SharePoint or DMS/CRM and click **Open**.

   The selected spreadsheet is displayed in the **Original** field.

   > ***Tip!*** *If you want to compare a recently used file, drag the file from* ***Recently opened files****.*

3. Select the spreadsheet you want to compare with the original spreadsheet:

   ▫ Drag the file over the **Modified** field, or

   ▫ Click [icon] to the right of the **Modified** field, navigate to the spreadsheet location in your local file system, SharePoint or DMS/CRM and click **Open**.

   The selected spreadsheet is displayed in the **Modified** field.

   > ***Tip!*** *To swap the original and modified spreadsheets, click* [icon] *.*

4. If you want to compare individual sheets, select the **Select sheets to compare** radio button.

   ○ Compare everything

   ⦿ Select sheets to compare

   Original sheets

   | Revenue Waterfall 2 | ∨ |

   Modified sheets

   | Select a sheet | ∨ |

5. Select the sheet in your original spreadsheet and the sheet in your modified spreadsheet that you want to compare.

6. To select what changes are detected and how they are displayed, select the rendering set to use. Rendering sets contain a set of parameters that define what is compared and how changes are displayed in the comparison. You can select from the standard rendering sets provided with Workshare Compare for Excel or you can create and customize your own rendering sets (described in *Rendering Sets in Compare for Excel*).
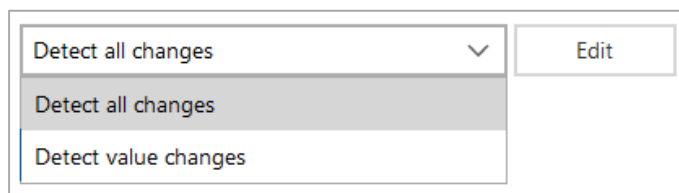
> *Note: Clicking **Edit** displays the Rendering Set Manager where you can create, modify and delete rendering sets. For a full description refer to* Rendering Sets in Compare for Excel.

7. Click **Compare**. The comparison process is launched.

When the comparison is complete, the Workshare Compare for Excel window is displayed showing the changes between the selected spreadsheets. For a full description of the Workshare Compare for Excel interface, refer to *Workshare Compare for Excel Main Window.* For a description of how to navigate between the changes and review the changes in your compared spreadsheets, refer to *Understanding Changes* and *Rendering Sets in* Compare for Excel

Rendering sets affect what changes are detected as well as how changes are displayed. Compare for Excel includes two default rendering sets or you may create your own.

Customizing what changes are detected

You can re-run a comparison changing specific options within the rendering set.

To re-run a comparison with different options:

1. In the **Home** tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

2. Modify the change types to compare in the **What to compare** tab. For example, deselect the **Font format** checkbox and Compare for Excel will not detect any changes to font formatting, including the font, font size, color, underline, style (italic, bold) and effect (strikethrough, superscript, subscript).

3. Do one of the following:

  ▫ Click **Save as new** and enter a name for the rendering set.

    Click **Save and re-run**. The new rendering set is saved and Compare for Excel re-runs the comparison using the new rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.

  ▫ Click **Save and re-run**. The changes you made to the options are saved in the selected rendering set and Compare for Excel re-runs the comparison using the selected parameters and displays the resulting comparison in the Workshare Compare for Excel main window.
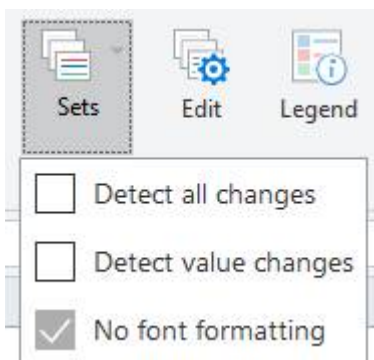
Customizing how changes are displayed

Applying a different rendering set

You can re-run a comparison using a different rendering set.

To re-run a comparison with a different rendering set:

1. In the **Home** tab, click **Sets** in the **Rendering Sets** group. A list of the currently defined rendering sets is displayed.

2. Select the rendering set to apply.

Compare for Excel re-runs the comparison using the selected rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.

Creating new rendering sets

Compare for Excel includes two rendering sets. You can create additional rendering sets using the Rendering Set Manager.

To create a new rendering set:

1. In the **Home** tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

2. Select a rendering set from the dropdown that you'll use as a base for the new rendering set.

3. Select what you want compared by the rendering set in the **What to compare** tab.
   - **Formulas**: Changes to formulas.
   - **Values (numbers and text)**: Changes to values in a cell – this could number values, such as "1" has changed to "2", or text values, such as , "January" has changed to "February".
   - **Number format**: Changes to number formatting. For example, the number format has been changed from "General" to "Currency".

     This includes changes to the properties of the number format. For example, a cell with the Currency format has had the number of decimal places changed from "2" to "0".
   - **Font format**: Changes to the font formatting, including the font, font size, color, underline, style (italic, bold) and effect (strikethrough, superscript, subscript).
   - **Cell changes**: Cells that have been inserted or deleted.
   - **Cell format**: Cells that have had a change to the visual formatting, including the cell shade, color and border.
   - **Overlaid objects (charts, pictures, shapes and text boxes)**: Changes to any overlaid objects, including charts, pictures, shapes and text boxes.

4. Select the **How to display changes** tab.

5. Select the colors (and styles) to use to identify the different types of changes in the comparison.

6. Click **Save as new**.

7. Enter a name for the new rendering set.

8. Click **Save and re-run**.

The new rendering set is saved and Compare for Excel re-runs the comparison using the new rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.

The new rendering set is now available from the **Sets** dropdown:

Deleting rendering sets

You can delete rendering sets using the Rendering Set Manager. You must always have at least one rendering set and you cannot delete the rendering set applied to the current comparison.

To delete a rendering set:

1. In the Home tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

2. Select the rendering set that you want to delete from the dropdown.

> ***Note***: *You cannot delete the rendering set currently applied to the open comparison. You would first have to return to the comparison and apply another rendering set.*

3. Click **Delete**.
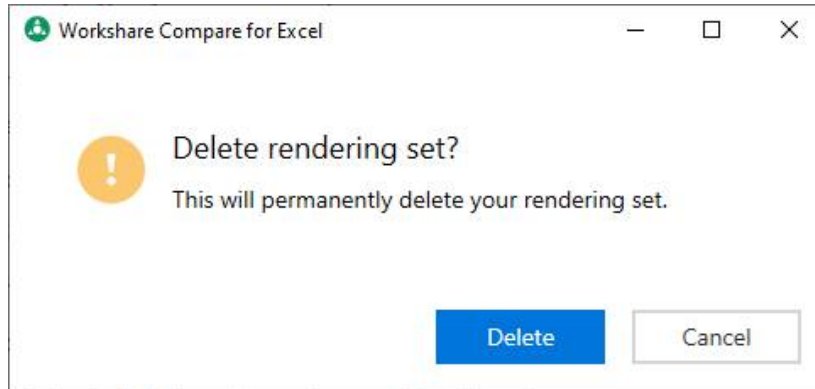
4. Click **Delete**. The rendering set is permanently deleted and no longer appears in the **Sets** dropdown.

Working with Comparisons.

Password-protected spreadsheets

Workshare can compare password-protected spreadsheets once you enter the password. After clicking **Compare** in the file selection dialog, you are prompted to enter the password for any password-protected files you have selected.
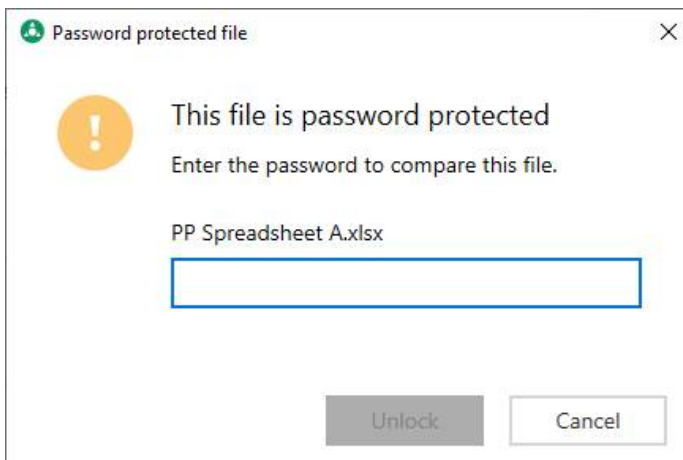
Enter the password for the spreadsheet and click **Unlock**. The comparison process is launched.

Workshare Compare for Excel Main Window

The Workshare Compare for Excel main window enables you to view the results of a comparison between an original spreadsheet and a modified spreadsheet.
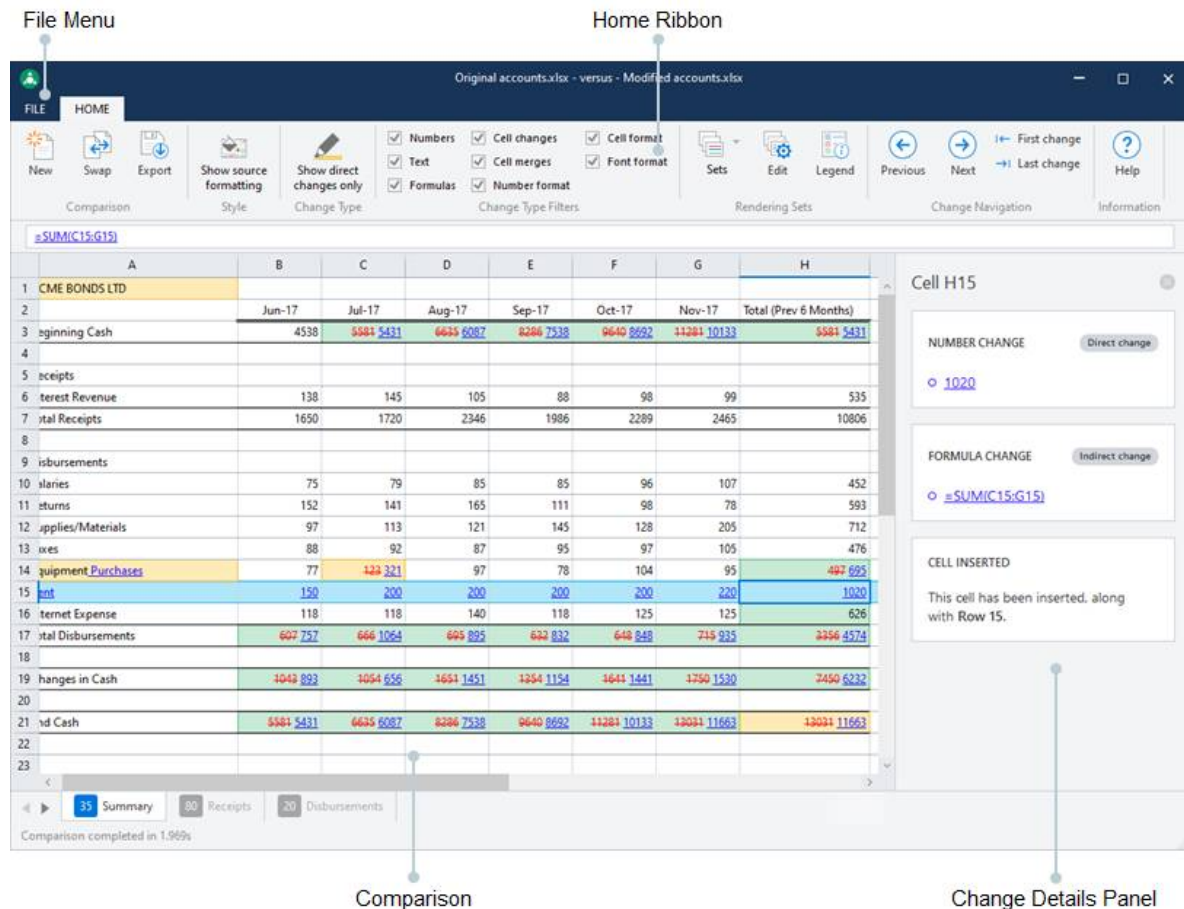
The different areas of the Workshare Compare for Excel work area are described in the following sections.

File menu

The File menu includes the following options:

Option	Description
New	Opens the file selection dialog so you can start a new comparison. The existing open comparison will be closed. Refer to *Comparing Spreadsheets*.
Swap	Swaps the original and modified spreadsheets and re-runs the comparison. Refer to *Swapping the source files*.

Option	Description
Export	Enables you to save the current comparison as an Excel file showing the changes and including a change summary tab. Refer to *Saving comparisons.*
About	Displays version information about Workshare Compare for Excel.
Close	Closes the open comparison and Workshare Compare for Excel.

Home tab

The Home ribbon enables you to move between changes, as well as control what changes are shown.

The options are described in the following table.

Section	Option	Description
Comparison	**New**	Opens the file selection dialog so you can start a new comparison. The existing open comparison will be closed. Refer to *Comparing Spreadsheets*.
	Swap	Swaps the original and modified spreadsheets and re-runs the comparison. Refer to *Swapping the source files*.
	Export	Enables you to save the current comparison as an Excel file showing the changes and including a change summary tab. Refer to *Saving comparisons.*
Style	**Show source formatting**	Displays/hides the formatting applied to the original and modified spreadsheets, such as cell shades and font styles. Refer to *Source formatting*.
Change Type	**Show direct changes only**	Displays/hides indirect changes. Indirect changes are changes that occur as the result of a modification to a different cell. Refer to *Direct and indirect changes*.
Change Type Filters	**Numbers**	Displays/hides changes to number values.
	Text	Displays/hides changes to text.
	Formulas	Displays/hides changes to formulas.
	Cell changes	Displays/hides whether cells have been inserted or deleted.

Section	Option	Description
	Cell merges	Displays/hides whether cells have been merged or split.
	Number format	Displays/hides changes to the number format applied to a cell.
	Cell format	Displays/hides changes to the visual formatting of a cell.
	Font format	Displays/hides changes to the font formatting of a cell.
Rendering Sets	**Sets**	Enables you to select a different rendering set from the dropdown list and Workshare Compare for Excel automatically re-runs the comparison applying the selected rendering set. Refer to *Rendering Sets in Compare for Excel*.
	Edit	Opens the Rendering Set Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to in *Rendering Sets in Compare for Excel*.
	Legend	Displays a description of the meaning of the colors used in the comparison.
Change Navigation	**Previous**	Navigates to the previous change in the comparison. Refer to *Navigate between changed cells*.
	Next	Navigates to the next change in the comparison. Refer to *Navigate between changed cells*.
	First change	Navigates to the first change in the comparison. Refer to *Navigate between changed cells*.
	Last change	Navigates to the last change in the comparison. Refer to *Navigate between changed cells*.
Information	**Help**	Provides access to online help.

Comparison area

The comparison area clearly indicates the changes between the compared spreadsheets. Insertions, deletions and modifications are highlighted in different colors, depending on the rendering set applied to the comparison.

Selecting a cell displays details about its changes in the Change details panel on the right. You can select changes in the comparison using your mouse or the buttons in the Home tab.

When several sheets have been compared, you can select a worksheet using the tabs at the bottom of the comparison.

Change details panel

The change details panel is displayed to the right of the comparison when a cell is selected. It provides details about the changes in the selected cell.

Each change is listed in its own card in the panel. The change type is displayed at the top of the card.

You can close the change details panel by clicking the close icon in the top right.

Understanding Changes

Changes are shown using a combination of color, formatting and text description and Workshare offers several ways to filter changes to help make review of your changes as easy as possible. You can also change the rendering set applied to the comparison to customize how the changes are highlighted within the comparison.

Source formatting

Source formatting is any formatting applied to the original and modified files. It includes effects such as:

- Cell shades
- Cell colors
- Cell borders
- Non-standard fonts
- Font colors
- Font underlines
- Font styles (italic, bold)
- Font effects (strikethrough, superscript, subscript)

In the comparison, source formatting is turned off by default so it's easier to see the changes.

B	C	D
Jun-17	Jul-17	Aug-17
4538	5581 5381	6635 6235
138	145	105
1650	1720	2346

B	C	D
Jun-17	Jul-17	Aug-17
4538	5581 5381	6635 6235
138	145	105
1650	1720	2346

A comparison with source formatting off   The same comparison with source formatting on

To view the source formatting, click **Show source formatting** in the Home ribbon.
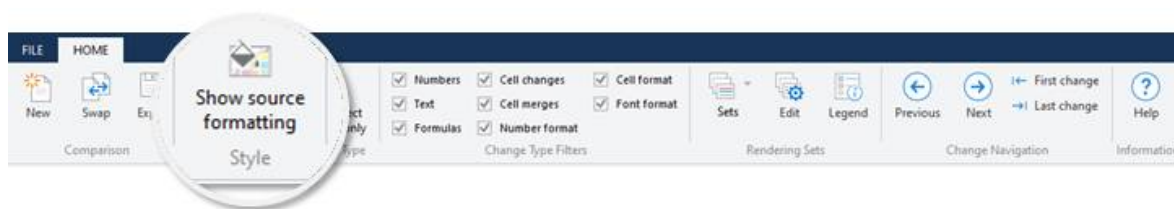
Change types

Direct and indirect changes

When a cell has changed, it can be useful to know if any other cells have also changed as a result.

Any change that has occurred as the result of a modification in the same cell is called a *direct change*. Any change that has occurred as the result of a modification to a different cell is called an *indirect change*.

For example, take a workbook that has a row full of formulas. If you insert a new row above the formula row, all the formulas are pushed down by one row. The change to these formulas is indirect. If you select one of the cells with a formula and modify the formula, the change is direct.

In a Workshare comparison, the rendering set determines how changes are highlighted. For example, direct changes could be highlighted in yellow and indirect changes in green.

Note: If a cell contains direct changes and indirect changes, it's highlighted in the color specified for direct changes.

Direct changes are always highlighted. Indirect changes are highlighted by default, but you can toggle them on and off by using the **Show direct changes only** button in the Home ribbon.
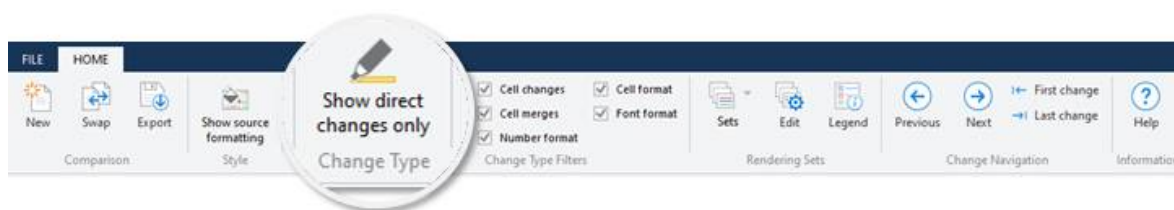
You can see all changes to a cell by selecting the cell (see *Changes to a cell*).

Change type filters

The change type filters let you focus on the types of changes that matter to you. By default, every type of change is highlighted in the comparison. Switch off highlighting of individual change types by deselecting them in the Home ribbon.
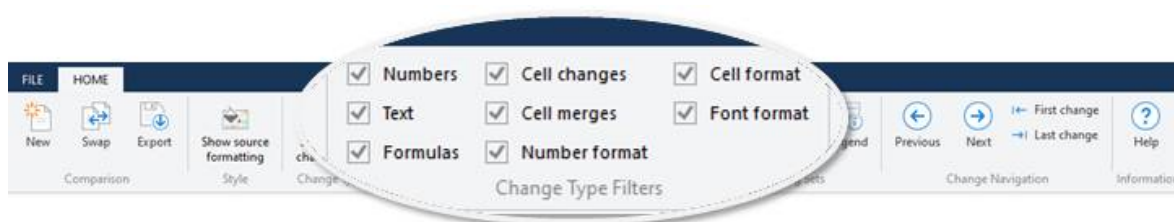
The following types of changes can be highlighted:

Type	Description
Numbers	Cells with number values that have changed. For example, "1" has changed to "2". *Note: The number format of the cell can be any format, including General, Number, Text, Currency, etc.*
Text	Cells with text values that have changed. For example, "January" has changed to "February". Where cells include text and numbers (e.g. "A1" is changed to "B2"), they will be marked as **Text** changes.

Type	Description
Formulas	Cells with a formula that has changed.
Cell changes	Cells that have been inserted or deleted.
Cell merges	Cells that have been merged or split.
Number format	Cells that have had a change to their number format. For example, the number format has been changed from "General" to "Currency". This includes changes to the properties of the number format. For example, a cell with the Currency format has had the number of decimal places changed from "2" to "0".
Cell format	Cells that have had a change to the visual formatting, including the cell shade, color and border.
Font format	Cells that have had a change to the font formatting, including the font, font size, color, underline, style (italic, bold) and effect (strikethrough, superscript, subscript).

Note: These checkboxes only change what information is highlighted in the comparison. If you select a cell, all changes to that cell will be displayed in the change details panel on the right, regardless of which change type filters are selected.

Toggle between changes

Where changes have been made to an overlaid object, such as charts, shapes, images, etc., you can toggle between the original and modified object.
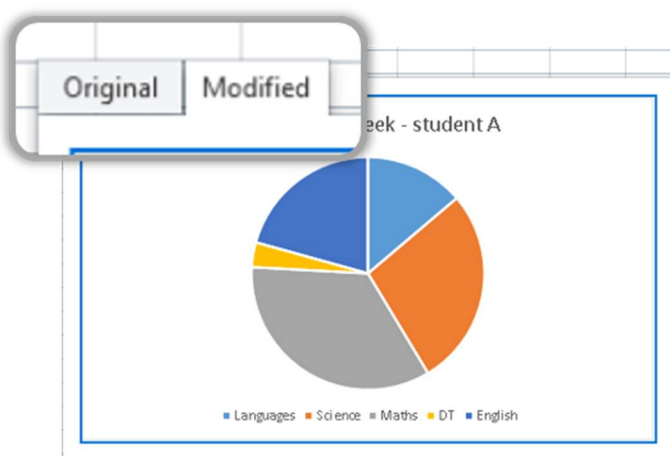
This enables you to quickly and clearly see what has changed.

Changes to a cell

You can dive into any cell to see all its changes. Select a cell and the changes are displayed in the change details panel on the right.
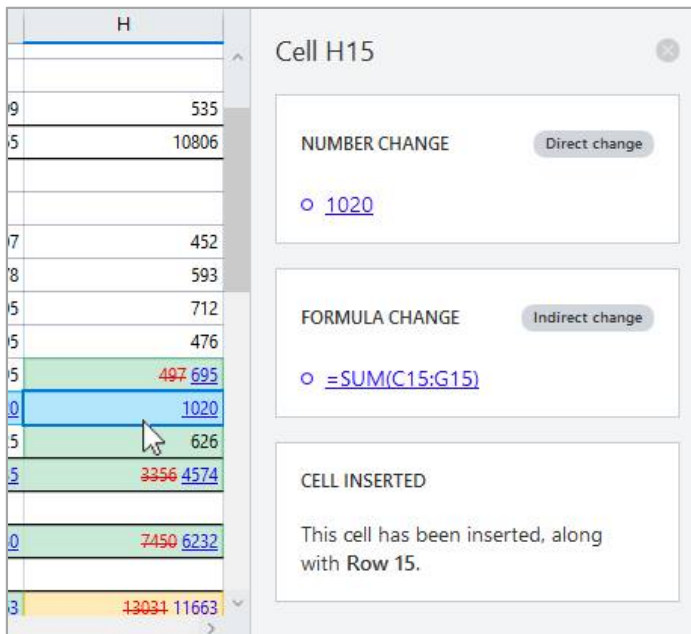
Each change is listed in its own card in the panel. The change type is displayed at the top of the card and also whether it's a direct or indirect change. You can clearly see what the cell contained in the original spreadsheet and what it contains in the modified spreadsheet.

Navigate between changed cells

The Change Navigation buttons in the Home ribbon enable you to move quickly through the changes in the comparison.
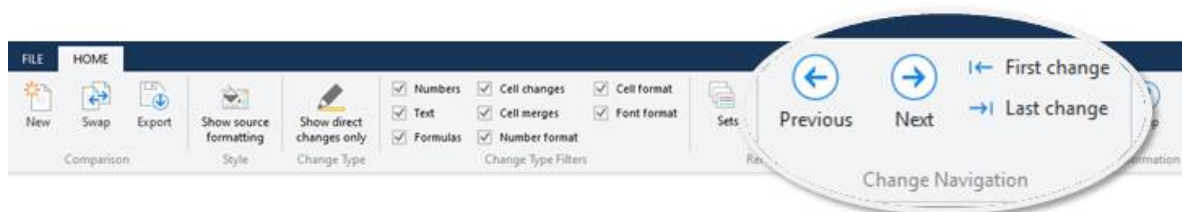
There are four buttons:

- **Previous**: The previous change is highlighted.
- **Next**: The next change is highlighted.
- **First change**: The first change is highlighted.
- **Last change**: The last change is highlighted.

Priorities for highlighting direct and indirect changes

If a cell contains direct changes and indirect changes, the direct change takes priority and the cell is highlighted in the color for direct changes.

Priorities for highlighting inserted and deleted cells

In cases where an inserted or deleted row intersects an inserted or deleted column, changes are displayed as follows:

- If an inserted column intersects with an inserted row, the cell displays as inserted (blue, with this rendering set).

27	58	8
35	47	18
65	25	62
17	56	67
50	36	67

- If an inserted column intersects with a deleted row, the cell displays as deleted (red, with this rendering set):

27	58	8
35	47	18
65	25	62
17	56	67
50	36	67

- If a deleted column intersects with an inserted row, the cell displays as deleted (red, with this rendering set):

27	58	8
35	47	18
65	25	62
17	56	67
50	36	67

- If a deleted column intersects with a deleted row, the cell displays as deleted (red, with this rendering set):

27	58	8
35	47	18
65	25	62
17	56	67
50	36	67

Rendering Sets in Compare for Excel

Rendering sets affect what changes are detected as well as how changes are displayed. Compare for Excel includes two default rendering sets or you may create your own.

Customizing what changes are detected

You can re-run a comparison changing specific options within the rendering set.

To re-run a comparison with different options:

4. In the **Home** tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

5. Modify the change types to compare in the **What to compare** tab. For example, deselect the **Font format** checkbox and Compare for Excel will not detect any changes to font formatting, including the font, font size, color, underline, style (italic, bold) and effect (strikethrough, superscript, subscript).

6. Do one of the following:
   - Click **Save as new** and enter a name for the rendering set.

   Click **Save and re-run**. The new rendering set is saved and Compare for Excel re-runs the comparison using the new rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.
   - Click **Save and re-run**. The changes you made to the options are saved in the selected rendering set and Compare for Excel re-runs the comparison using the selected parameters and displays the resulting comparison in the Workshare Compare for Excel main window.

Customizing how changes are displayed

Applying a different rendering set

You can re-run a comparison using a different rendering set.

To re-run a comparison with a different rendering set:

3. In the **Home** tab, click **Sets** in the **Rendering Sets** group. A list of the currently defined rendering sets is displayed.
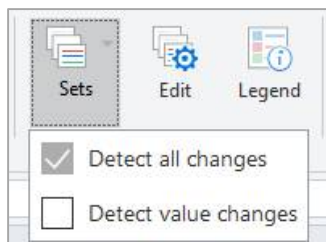
4. Select the rendering set to apply.

Compare for Excel re-runs the comparison using the selected rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.

Creating new rendering sets

Compare for Excel includes two rendering sets. You can create additional rendering sets using the Rendering Set Manager.

To create a new rendering set:

7. In the **Home** tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

8. Select a rendering set from the dropdown that you'll use as a base for the new rendering set.

> Edit your rendering set or create a new one
>
> Detect value changes ⌄
>
> Detect all changes
>
> Detect value changes

9. Select what you want compared by the rendering set in the **What to compare** tab.
   - **Formulas**: Changes to formulas.
   - **Values (numbers and text)**: Changes to values in a cell – this could number values, such as "1" has changed to "2", or text values, such as , "January" has changed to "February".
   - **Number format**: Changes to number formatting. For example, the number format has been changed from "General" to "Currency".

     This includes changes to the properties of the number format. For example, a cell with the Currency format has had the number of decimal places changed from "2" to "0".
   - **Font format**: Changes to the font formatting, including the font, font size, color, underline, style (italic, bold) and effect (strikethrough, superscript, subscript).
   - **Cell changes**: Cells that have been inserted or deleted.
   - **Cell format**: Cells that have had a change to the visual formatting, including the cell shade, color and border.
   - **Overlaid objects (charts, pictures, shapes and text boxes)**: Changes to any overlaid objects, including charts, pictures, shapes and text boxes.

10. Select the **How to display changes** tab.
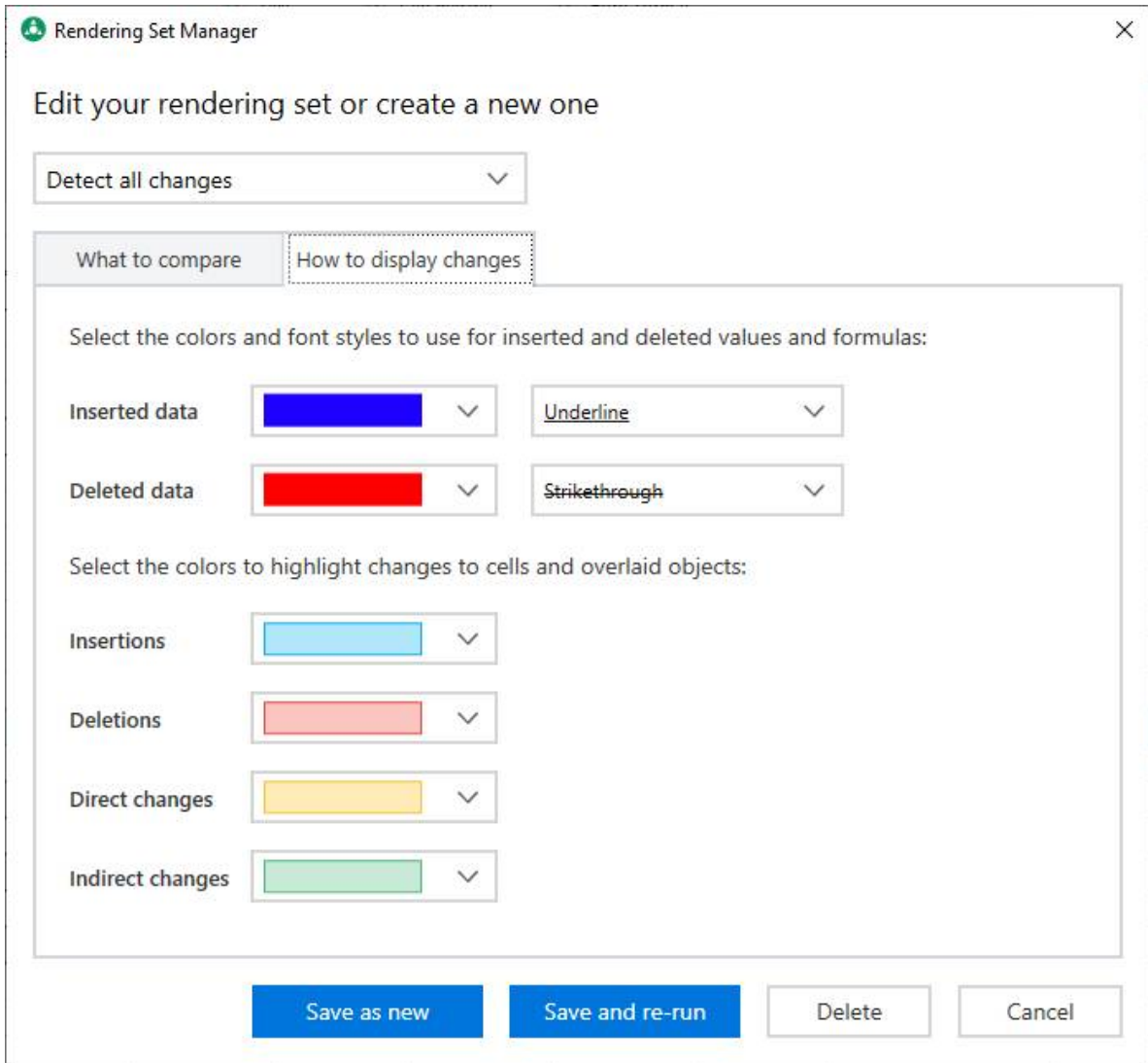
11. Select the colors (and styles) to use to identify the different types of changes in the comparison.

12. Click **Save as new**.
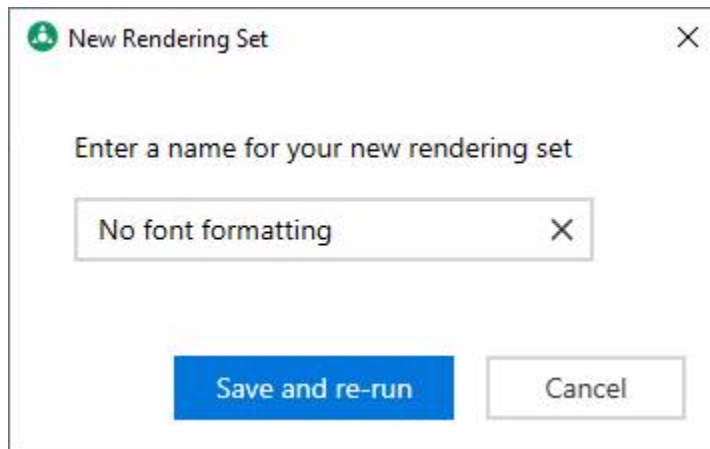
5. Enter a name for the new rendering set.

6. Click **Save and re-run**.

The new rendering set is saved and Compare for Excel re-runs the comparison using the new rendering set and displays the resulting comparison in the Workshare Compare for Excel main window.

The new rendering set is now available from the **Sets** dropdown:
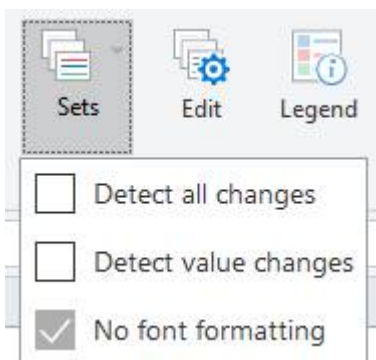
Deleting rendering sets

You can delete rendering sets using the Rendering Set Manager. You must always have at least one rendering set and you cannot delete the rendering set applied to the current comparison.

To delete a rendering set:

7. In the Home tab, click **Edit** in the **Rendering Sets** group. The Rendering Set Manager is displayed.

8. Select the rendering set that you want to delete from the dropdown.

> **Note**: You cannot delete the rendering set currently applied to the open comparison. You would first have to return to the comparison and apply another rendering set.

9. Click **Delete**.
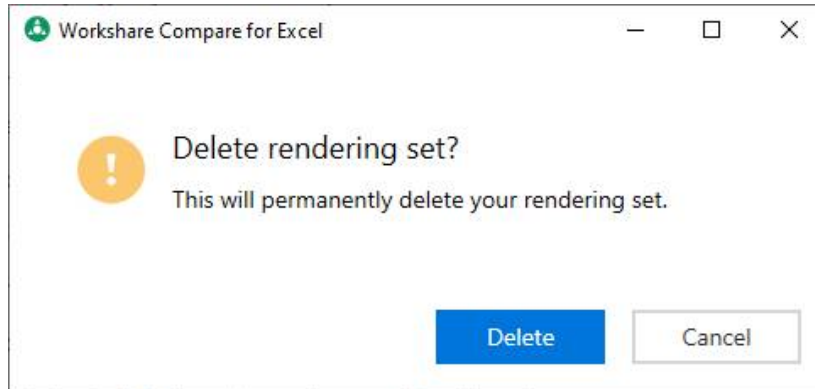
10. Click **Delete**. The rendering set is permanently deleted and no longer appears in the **Sets** dropdown.

Working with Comparisons

Swapping the source files

You can re-run a comparison exchanging the original spreadsheet for the modified spreadsheet and vice versa. For example, if you selected Spreadsheet A as the original spreadsheet and Spreadsheet B as the modified spreadsheet, Workshare Compare for Excel shows the changes made to Spreadsheet A to produce Spreadsheet B. You can then swap the spreadsheets so that Spreadsheet B is now the original and Spreadsheet A is the modified spreadsheet. Workshare Compare for Excel automatically re-runs the comparison and shows the changes made to Spreadsheet B to produce Spreadsheet A.

To swap the source spreadsheets:

Click **Swap** in the Home ribbon. Workshare Compare for Excel automatically runs a new comparison, using the modified spreadsheet as the original spreadsheet and the original spreadsheet as the modified spreadsheet. The new comparison is displayed in the Workshare Compare for Excel window replacing the previous comparison.

Saving comparisons

You can quickly export your changes to a new Excel file that you can save and share. You can save the file in your DMS or CRM, locally or on your network.

To export the comparison:

1. Click **Export** in the Home ribbon. The Export to Microsoft Excel dialog opens.
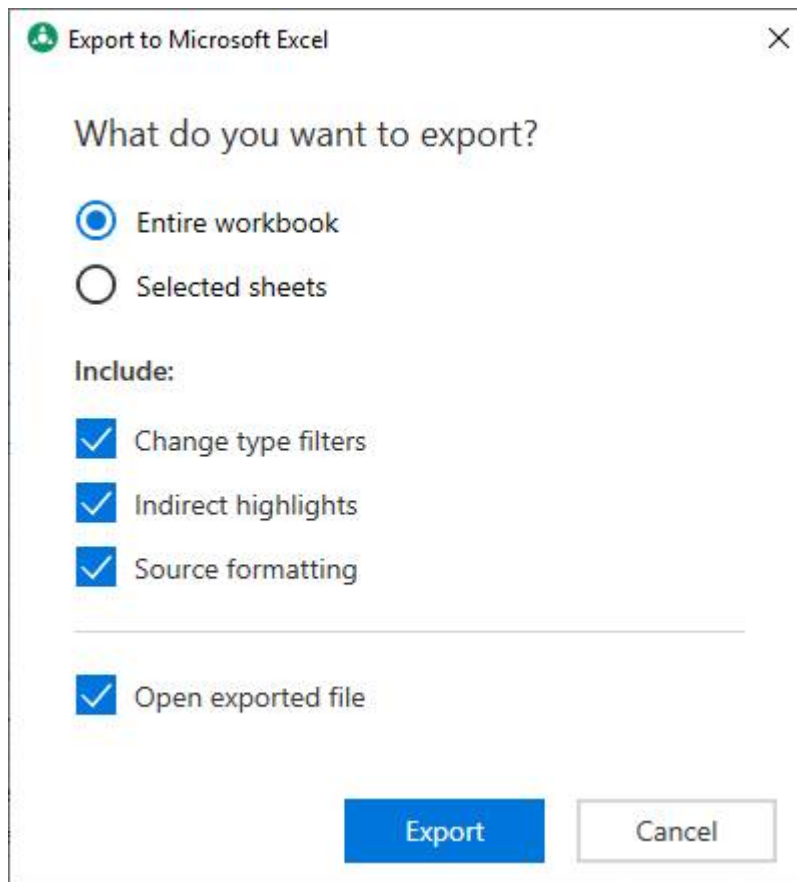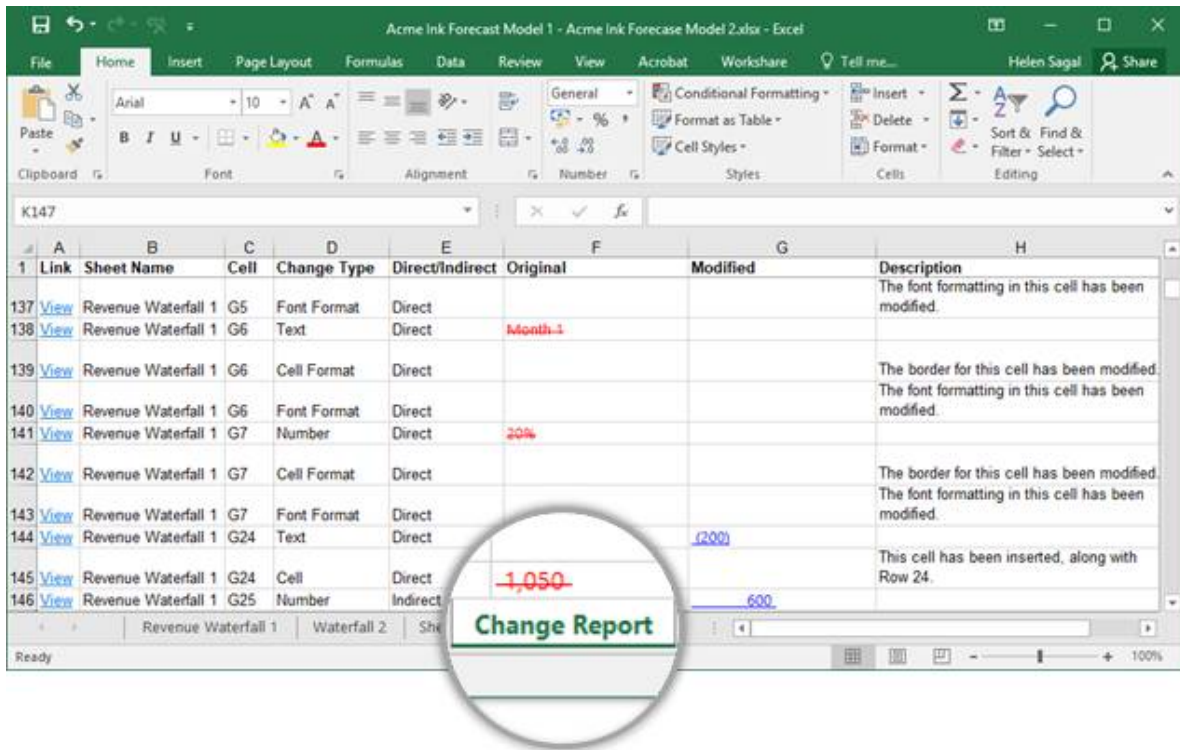
2. Select whether you want to export the **Entire workbook** or only some **Selected sheets**.

3. If you choose **Selected sheets**, click inside the **Select one or more sheets** field and choose the sheets to export.
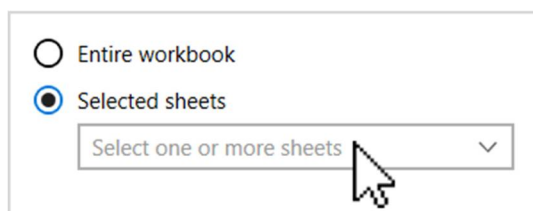
4. By default, all of the following will be included in the comparison:
   ▫ **Change type filters:** All change type filters currently highlighted.
   ▫ **Indirect highlights:** All indirect changes.
   ▫ **Source formatting:** Source formatting from the original and modified files.

   If you would like to exclude any of these options, deselect them.

5. If you don't want the saved comparison to open once the export is complete, deselect the **Open exported file** checkbox.

6. Click **Export**. The Save As dialog opens.

7. Navigate to a save location.

8. In the **File name** field, enter a name for the new file.

9. Click **Save**. The comparison is exported as a new Excel file.

The last worksheet of the Excel file is the Change Report. It lists every change from the comparison (excluding any changes you chose not to include when you exported the comparison). To jump to a change, click its **View** option in the Link column.

The other worksheets correspond to the worksheets in the original and modified files. Select a sheet to view its comparison.

Chapter 5:   Protecting Documents

This chapter describes how to view the content risk in documents as well as remove selected content risk from a document. It includes the following sections:

- **Overview – Protection on your Desktop**, page 128, introduces the ways in which Workshare Protect enables you to protect documents by viewing and removing sensitive content risk.

- **Displaying Content Risk in Documents**, page 128, describes how to discover all content risk in Office documents.

- **Cleaning Hidden Data**, page 130, describes how to remove selected types of hidden data from a document and from multiple documents.

- **Converting to PDF**, page 139, describes how to secure your documents by converting to PDF.

Overview – Protection on your Desktop

Note: *This chapter describes how to protect documents on your desktop by removing metadata and converting to PDF. The protection of documents when emailing is described in Chapter 6: Protecting Attachments.*

Workshare Protect offers complete protection of files to ensure they are fully secure before distribution. Discover what hidden metadata remains in your document, clean it and then convert the document to PDF ensuring a safe and secure file.

Protect provides comprehensive content risk protection enabling the discovery and removal of hidden sensitive data as well visible sensitive data. Hidden sensitive data may include information such as track changes, author's name, server names, keywords, routing slips and authoring trails. Protect integrates with Office providing an option to display a comprehensive report of all the content risk in a document, displayed according to its risk level (high, medium, low).

Workshare Protect creates the most secure PDF files available from any application. You can quickly and easily convert open and closed Microsoft Office documents into PDF or PDF/A removing hidden data from the document and setting security options as you do so. Workshare Protect also provides "PDF Anywhere" which is the ability to convert a document to PDF from any application.

Note: *PDF creation can also be enforced on email attachments leaving your organization. Refer to Chapter 6: Protecting Attachments.*

Displaying Content Risk in Documents

Workshare Protect integrates with Microsoft Office to provide an option to discover and view content risk in Microsoft Word, Excel or PowerPoint documents.

To discover content risk in your document:

1. Open your document and click **Content Risk**, (**Protect** group) in the *Workshare* tab.

   Workshare Protect checks the document for content risk. This process may take a few moments if your document is large or if it contains large amounts of content risk. Once the discovery process is complete, the Document Risk Report is displayed showing a summary of the content risk found.
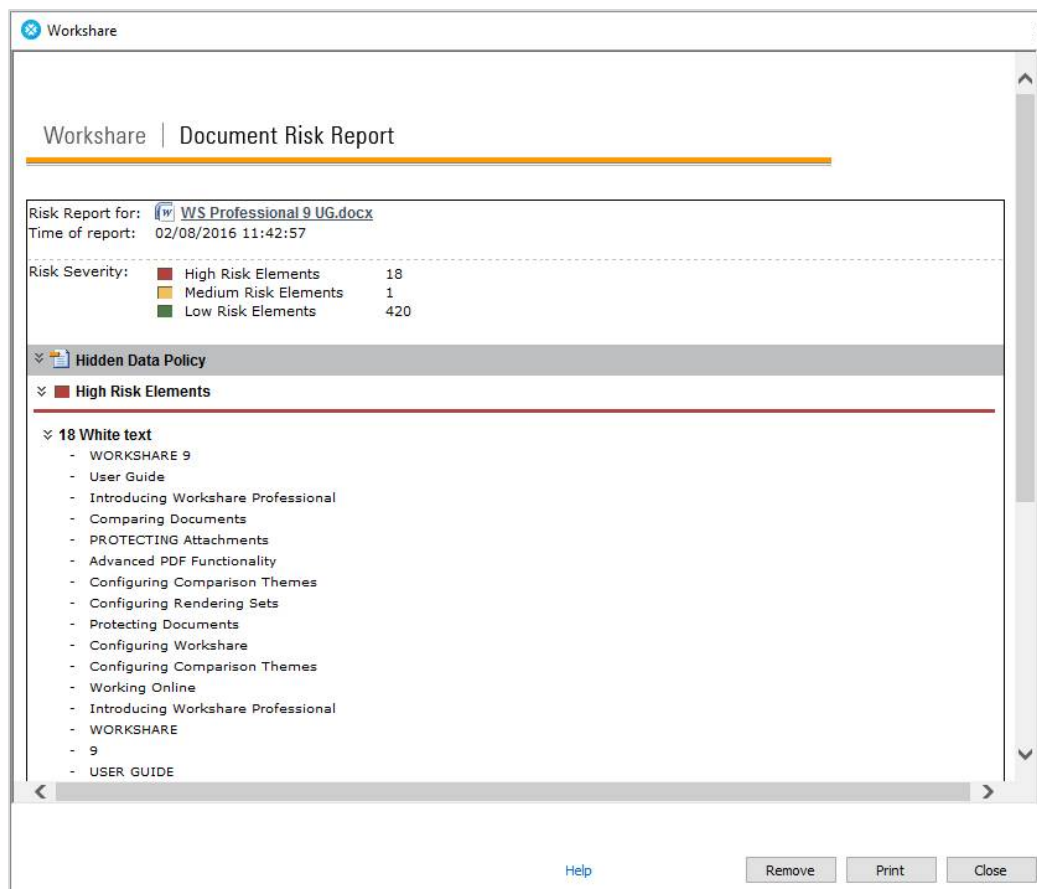
   The content risk found is divided into high risk, medium risk and low risk.

2. To display details of the content risk found, click ⌃ to the left of the content risk type.

3. To remove hidden data from the document, use the **Remove** button. Refer to *Cleaning Hidden Data*, for more details.

4. To print the report, click **Print**.

Cleaning Hidden Data

In Microsoft Office documents, once you have discovered the content risk in a document, you can remove selected types of hidden data as required. If you want to remove hidden data from PDF files or from multiple Microsoft Office documents, you can use the Workshare Batch Clean tool. Refer to *Batch cleaning*.

To remove hidden data:

1. Click **Remove** in the Document Risk Report. The *Advanced Options* dialog is displayed.
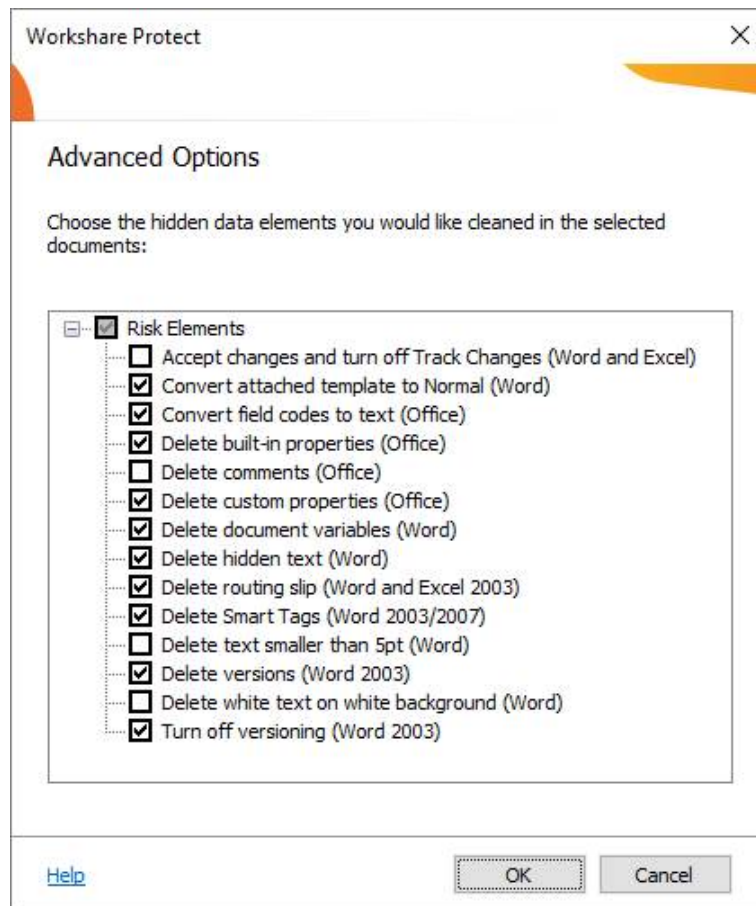
   A complete list of hidden data that can be removed, reset or converted is listed in the dialog. Different options will appear according to the type of document – Word, Excel or PowerPoint. For a full description of the different options, refer to *Cleaning options*.

2. Select the hidden data you want to remove by selecting the checkboxes to the left of the options.

3. After making your selection, click **OK**. The selected hidden data is removed from the document.

Workshare Protect may take a few moments to clean you document depending on the size of the document and the amount of hidden data to be removed. The Document Risk Report is updated after the document has been cleaned to show any remaining content risk. After cleaning, the document with hidden data removed is still stored in memory only. If you want to keep the cleaned document, you now have to save the document.

Batch cleaning

If you want to remove the same types of hidden data from several documents, you can use the Workshare Batch Clean tool to clean multiple documents (up to 256) simultaneously.

To clean multiple documents:

1. From the Start menu, select **Workshare**, and then **Workshare Batch Clean**. The *Batch Clean* dialog is displayed.
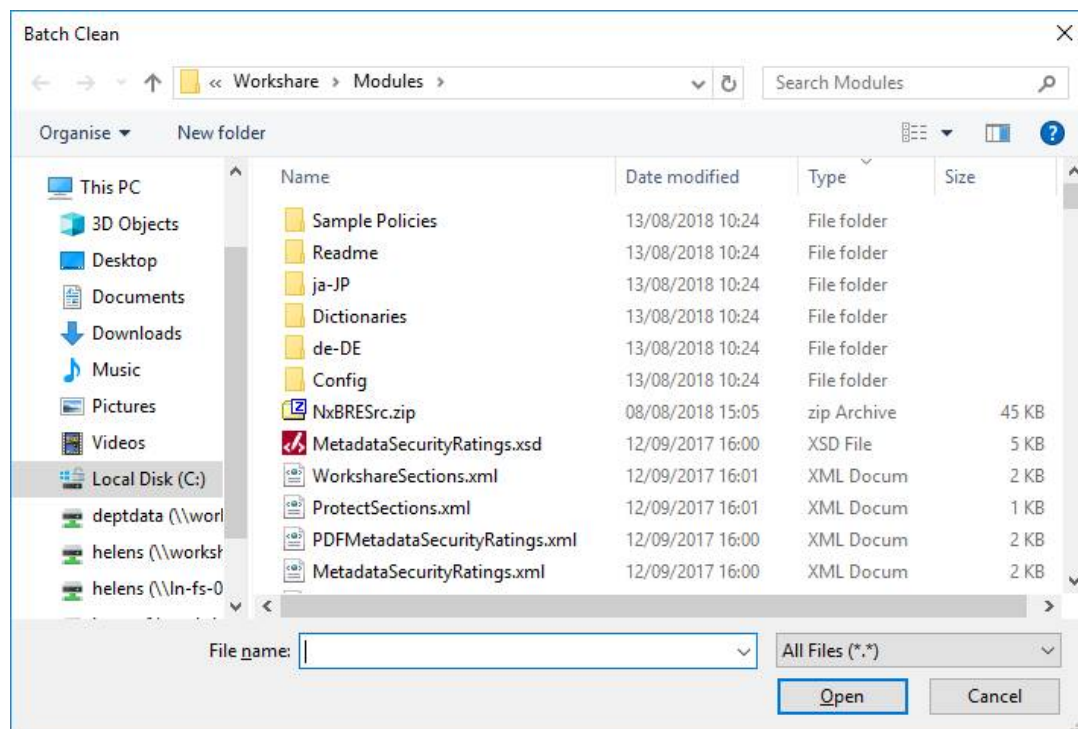
*Note: To view more document types, select **All Office files** from the **Files of type** dropdown list. If unsupported file types are selected for batch cleaning, they will be ignored.*

2. Select the documents you want to clean. Press the **Ctrl** or Shift key to select multiple documents.

3. Click **Open**. The *Batch Clean* dialog is displayed.

*Tip! An alternative to steps 1, 2 and 3 is to select the documents in File Explorer, then right-click and select **Send To** then **Batch Clean**.*
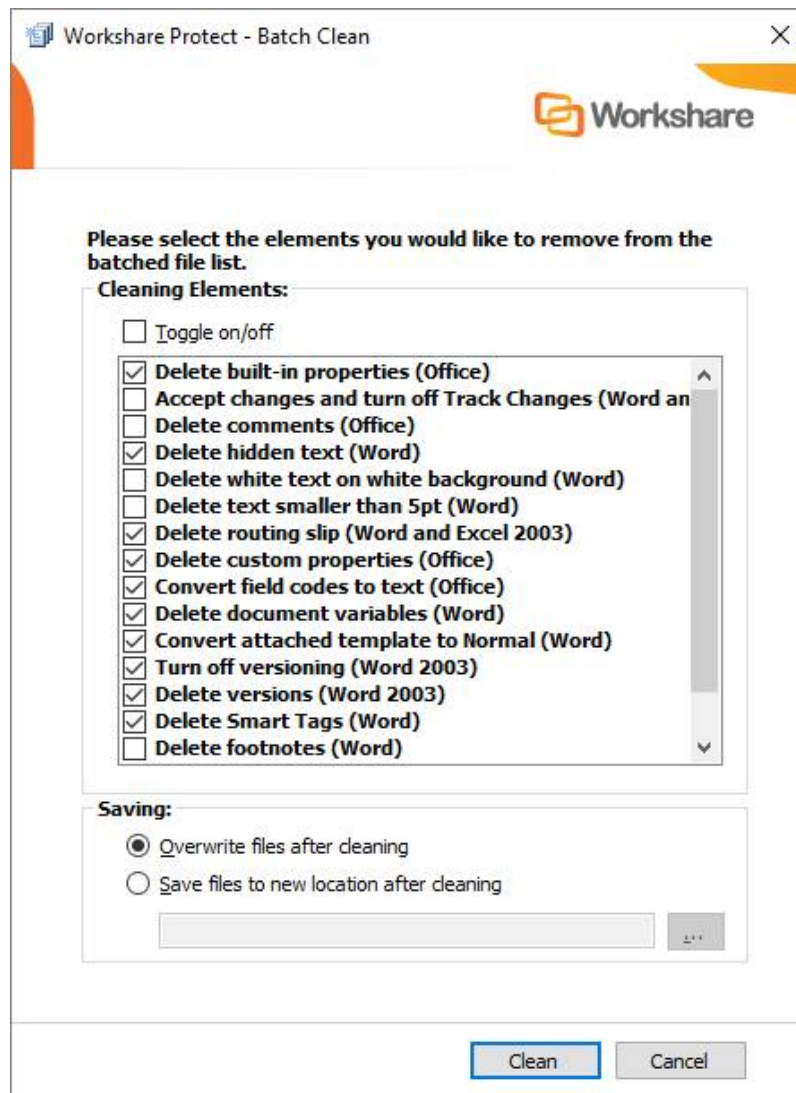
A complete list of hidden data that can be removed, reset or converted is listed in the dialog. For a full description of the different options, refer to *Cleaning options*.

4. Select the hidden data you want to remove by selecting the checkboxes to the left of the hidden data options. All the selected files will be cleaned using the same options.

*Note: The metadata that is selected to be removed by default is according to the Content Risk settings in the Workshare Configuration Manager (**Protection > Remove Metadata** category).*

> *Tip! Select the **Toggle on/off** checkbox to select/deselect all the hidden data options.*

5. Select one of the following save options:

   ▫ **Overwrite files after cleaning**: Selecting this option will save the cleaned files over the original files, overwriting the existing version.

   > *Note: You must have 'write' permissions on the file in order to overwrite the original. If you do not have 'write' permissions on all files selected, this option is disabled.*

   ▫ **Save files to new location after cleaning**: Selecting this option will save the cleaned files to a different location, leaving the original files in their original location and in an uncleaned state. Click the browse button and select the new save location.

6. Click **Clean**. The selected files are cleaned according to your selection. Once the process is complete, a report is displayed indicating which files were cleaned successfully.

7. Click **Finish**.

Batch cleaning using a command line

Batch cleaning can be performed using the command line.

To batch clean using the command line:

1. From the Start menu, select **Run**.

2. Enter **cmd** in the **Open** field and click **OK**.

3. Enter the clean command required. Samples are given below:

- To clean hidden data from the entire hard disk:

```
bc-console.exe "c:\" /s /all
```

- To clean all hidden data from a single document:

```
bc-console.exe "<filepath>" /all
```

   where <filepath> is the full path to the document to clean.

- To exclude specific data from the cleaning (here comments and track changes are excluded):
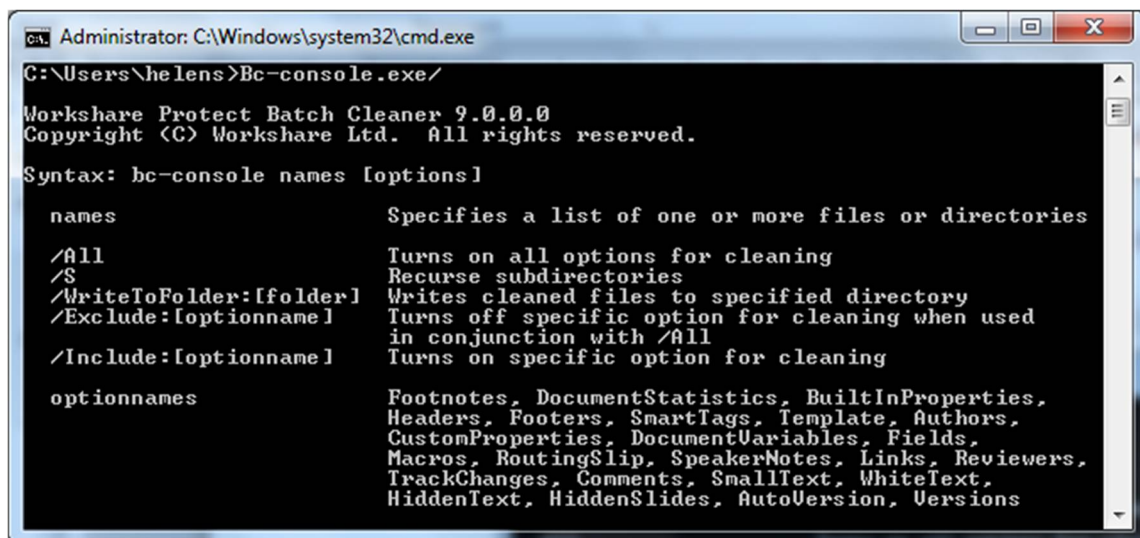
```
Bc-console.exe "<filepath>" /all /exclude:comments
/exclude:trackchanges
```

- To clean only specified data from the document (here comments and track changes are the data to clean):

```
Bc-console.exe "<filepath>" /include:comments /include:trackchanges
```

For a complete list of options, type the following command:

```
Bc-console.exe/
```

The options are described in the following table:

Option	Description
`/All`	All hidden data is removed from the specified documents. To leave specified types of hidden data in a document, the `/All` command can be used in conjunction with the `/Exclude` command. The `/All` command cannot be used in conjunction with the `/Include` command.
`/S`	Hidden data is removed from sub-folders of the specified folder.
`/WriteToFolder:[folder]`	The cleaned file is saved to a specified location. If this command is not included the original file is overwritten with the cleaned file. Cleaned files saved using the `/WriteToFolder` command will have a flat file structure. If files have the same names, they will be appended with a number.
`/Exclude:[optionname]`	Excludes specified types of hidden data from being removed. The `/Exclude` command is used in conjunction with the `/All` command. The valid types of hidden data that can be excluded are detailed in the **optionnames** list.
`/Include:[optionname]`	Specifies which types of hidden data are to be removed. The `/Include` command is used instead of the `/All` command. The `/Include` command cannot be used with the `/All` command or the `/Exclude` command. The valid types of hidden data that can be specified are detailed in the **optionnames** list.
`optionnames`	The valid types of hidden data that can be used with the `/Exclude` and `/Include` commands. Footnotes, DocumentStatistics, BuiltInProperties, Headers, Footers, SmartTags, Template, Authors, CustomProperties, DocumentVariables, Fields, Macros, RoutingSlip, SpeakerNotes, Links, Reviewers, TrackChanges, Comments, SmallText, WhiteText, HiddenText, HiddenSlides, AutoVersion, Versions

Cleaning options

The different hidden data cleaning options that are selected when cleaning an individual document or when batch cleaning several documents are explained below:

Option	Description
Accept changes and turn off Track Changes (Word and Excel)	Microsoft Word and Excel. Accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked.
Convert attached template to Normal (Word)	Microsoft Word only. Converts the attached template to normal.dot. Automatic style updating is disabled before the template is removed. Therefore the formatting and styles in your document will not be affected by removing the attached template.
Convert field codes to text (Office)	Microsoft Word, Excel and PowerPoint. Converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index. In Microsoft Excel and PowerPoint, hyperlinks are converted to text. *Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.* This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed. *Note: You may want to remove some field codes but not others. For example, you may want to clean 'Include text' field codes, but retain the Table of Contents and Page Numbers. To do this you can specify the field codes you want to keep in the **Protection > Exclude Metadata** category of the Workshare Configuration Manager, and then clean field codes as normal. See Workshare Configuration Options for more details.*
Delete attachments (PDF)	PDF only. Removes files that are attached to the PDF as a whole. Attachments that are linked to a specific point in a PDF file are not removed. They are treated as markups and will only be removed if the **Delete markups** parameter is selected.
Delete bookmarks (PDF)	PDF only. Removes any bookmarks in a PDF file.

Option	Description
Delete built-in properties (Office)	Microsoft Word, Excel and PowerPoint. Removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number.
Delete comments (Office)	Microsoft Word, Excel and PowerPoint. Removes any comments embedded in the document.
Delete custom properties (Office)	Microsoft Word, Excel and PowerPoint. Removes any custom properties that have been added to the document.
Delete document variables (Word)	Microsoft Word only. Deletes all document variables. Document variables are values stored in Microsoft Word documents that are used by either field codes or macros. These variables may contain confidential information like company names or file locations. Even if field codes and macros are removed, the variables used may remain in the document. Variables can be viewed in Microsoft Word in the Visual Basic Editor.
Delete footers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. Removes any footers included in the sheet or slide.
Delete headers (Excel and PowerPoint)	Microsoft Excel and PowerPoint. Removes any headers included in the sheet or slide. *Note: Headers and footers cannot be removed from PowerPoint documents when using Lightspeed clean.*
Delete hidden slides (PowerPoint)	Microsoft PowerPoint only. Removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information.
Delete hidden text (Word)	Microsoft Word only. Removes all text that has been formatted as hidden.
Delete links (Excel)	Microsoft Excel only. Converts external links in Microsoft Excel files to text. The following are examples of external links: • Link to a cell in another Microsoft Excel document. • Named link to a named reference in another Microsoft Excel document. • Link to another document. • OLE link that inserts another document as an icon. • OLE link that inserts another document as text.

Option	Description
Delete macros (Word and Excel)	Microsoft Word and Excel. Removes VBA macros from a document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.
Delete markups (PDF)	PDF only. Removes any markup in a PDF file. Markup is a tool used to make comments and annotations to PDF documents.
Delete properties (PDF)	PDF only. Removes properties in a PDF file. Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base. *Note: Removing properties from a PDF/A file will disable its PDF/A status.*
Delete routing slip (Word and Excel 2003)	Microsoft Word and Excel. Removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information, such as recipients, subject, and introduction, which are used when sending to a mail recipient.
Delete Smart Tags (Word 2003/2007)	Microsoft Word only. Removes smart tags from Microsoft Word documents. Smart tags are added to your documents as you create them if the option is enabled. These tags are linked to particular text in a document, such as a name, and allow you to perform certain actions by selecting the link associated with the text. Depending on the smart tag functions you use, they may embed extra hidden information in your document. Smart tags only exist in Microsoft Office XP to 2010.
Delete Speaker Notes (PowerPoint)	Microsoft PowerPoint only. Deletes all text that appears on the Notes Page in a Microsoft PowerPoint presentation. This is usually used by speakers to remind them of points during a presentation. You may want to remove speaker notes before distributing a presentation, as they are not usually intended for others to read.
Delete text smaller than 5pt (Word)	Microsoft Word only. Removes all text that has been formatted with a font size less that 5pt (i.e. 4pt and less). Small text can also be detected in Microsoft Excel but it is not cleaned.

Option	Description
Delete versions (Word 2003)	Microsoft Word only. Removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document.
Delete white text on white background (Word)	Microsoft Word only. Removes all text with a white font that has been formatted with a white background color.
Turn off versioning (Word 2003)	Microsoft Word only. Turns off the flag to automatically save a new version of the document every time the document is closed. This applies to local file systems only. Versions can still be saved manually by saving a file with a different name.

Converting to PDF

At any time when working on a document in Microsoft Word, Excel or PowerPoint, you can convert the document into PDF or PDF/A. This is useful if you want to maintain a file in its current format, as PDF documents cannot be edited as easily as Microsoft Word, Excel and PowerPoint documents. This functionality is available from within an open document or when the document is closed.

Workshare Protect automatically saves a document before converting to PDF or PDF/A. Documents can be stored locally, in SharePoint or in your DMS.

To convert a document to PDF or PDF/A:

1. Start in either of the following ways:
   - ▫ With your document open in Microsoft Word, Excel or PowerPoint, click **Convert to PDF** (**Protect** group) in the Workshare tab.
   - ▫ Right-click a closed Microsoft Word, Excel or PowerPoint file on your desktop or DMS and select **Convert to PDF with Workshare** from the menu.

   The *Convert to PDF* dialog is displayed.
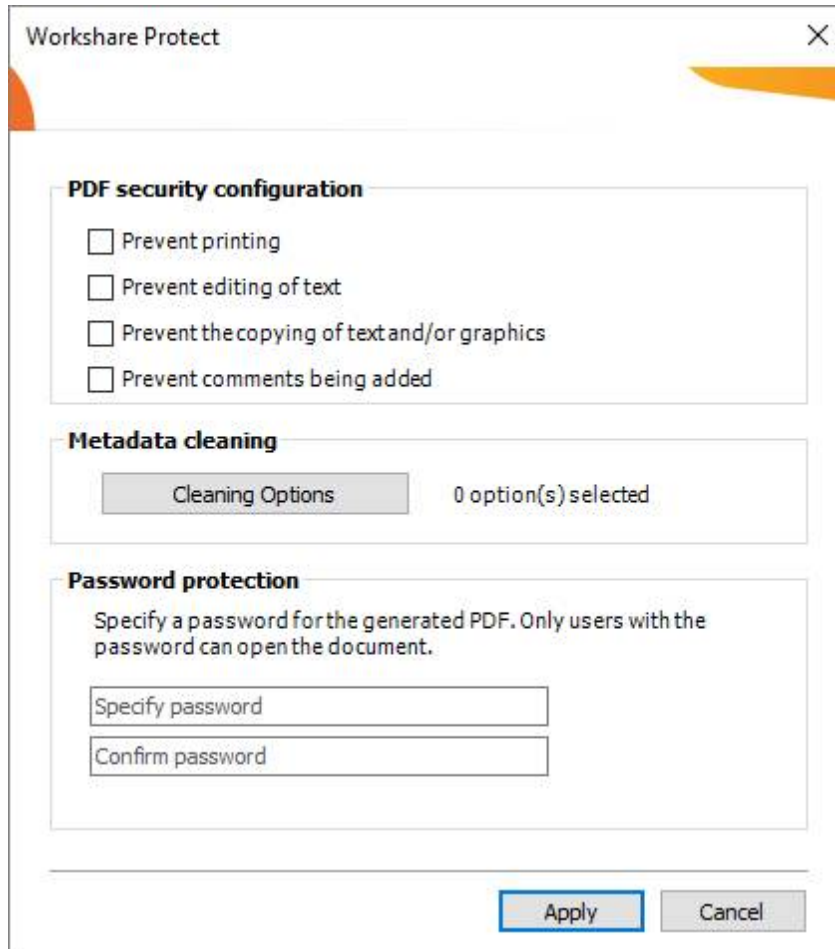
> **Note:** *If working with a DMS, the dialog looks slightly different to the one above and you can select whether to save the PDF as a new document or related document in your DMS or as a local file.*

2. Select whether to convert to PDF or PDF/A.

3. Click **Configure PDF Security** to set PDF security options and remove metadata.

4. Select one or more of the following security options:
   - **Prevent printing:** Prevents users from printing the PDF document.
   - **Prevent editing of text:** Prevents users with Adobe Distiller from editing the PDF document.
   - **Prevent the copying of text and/or graphics:** Prevents users from copying graphics or text directly from the PDF document.
   - **Prevent comments being added:** Prevents users with Adobe Distiller from adding comments to the PDF document.

   Note: These options are disabled and cannot be selected if you selected PDF/A in step 2.

5. To specify what hidden data to remove before converting it to PDF, click **Cleaning Options**.
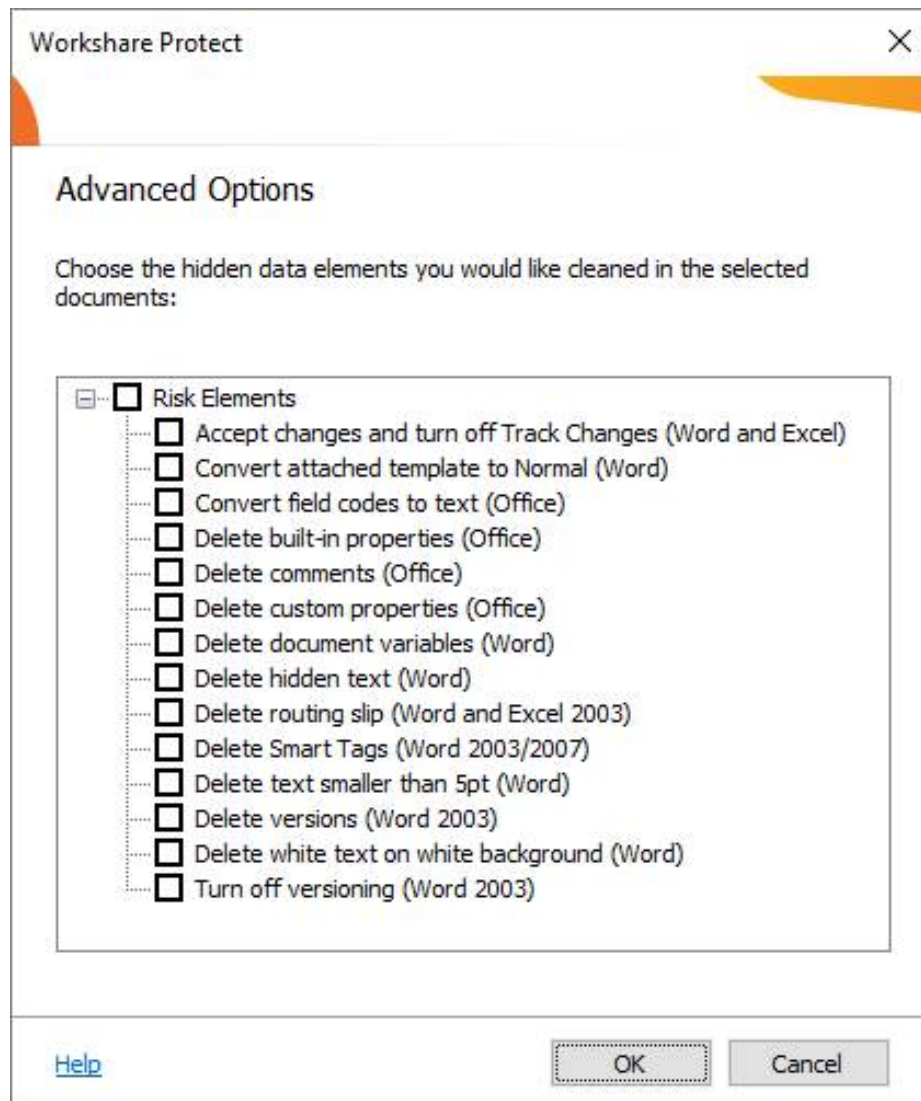
6. Select hidden data elements as required. For a full description of all the hidden data elements, refer to *Cleaning options* for further information.

7. Click **OK**.

8. If required, set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, users can only open the PDF after entering this password.

> *Note*: *If you selected PDF/A in step 2, you cannot set a password and the* **Password protection** *area is disabled.*

9. Click **Apply**.

10. In the *Convert to PDF* dialog, if you want to create a PDF of part of the document only, select the **Pages** radio button and specify a page range.

> *Note: You can also PDF individual pages by specifying the pages (separated by commas) in the **Pages** field.*

11. In the **View and send** area, select the **Open PDF once created** checkbox if you want the PDF to be opened once it has been created or select the **Email PDF as attachment** checkbox if you want the PDF to be attached to an email once it has been created.

12. If required, click **Preview** to view the document as a PDF.

13. Click **Create**.

14. In the save dialog, specify the name and location for the PDF file and click **Save**. The document is converted to PDF or PDF/A. If you selected **Open PDF once created**, the new PDF is opened. If you selected **Email PDF as attachment**, an email message window is displayed with the PDF as an attachment.

PDF anywhere

Workshare Protect can convert any document or file to PDF, for example, a page in Internet Explorer, an email message or a text file in Notepad. You can create a new PDF from the file or add to an existing PDF.

To convert to PDF from anywhere:

1. Click **Print** in the application.

2. Select **Workshare PDF Publisher** as the printer.

3. Specify other settings as required and click **Print**. The *Output File Name* dialog is
    displayed.
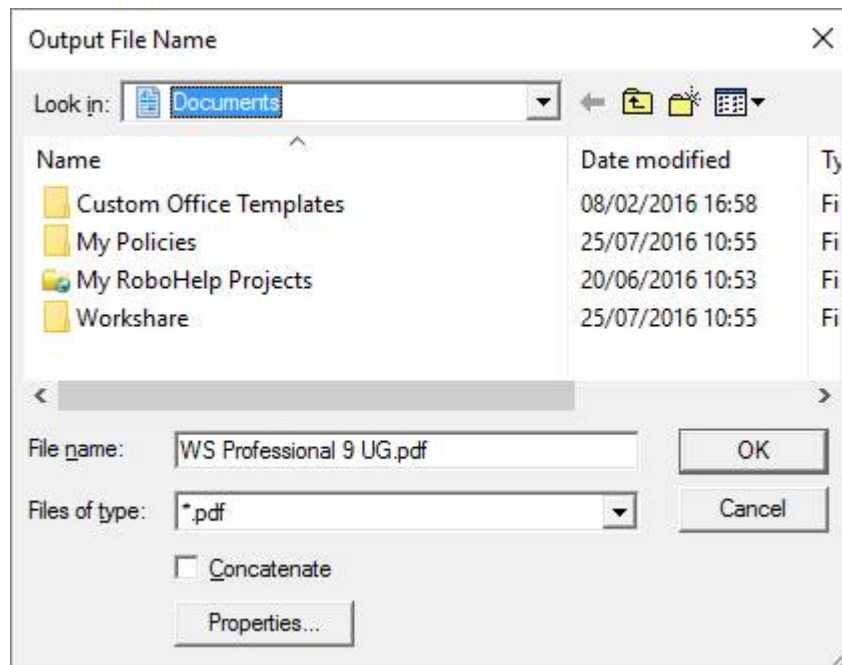
4. Specify a name for the PDF in the **File name** field or, if you want to add to an
    existing PDF, select the **Concatenate** checkbox and browse to and select the
    existing PDF.

5. Click **OK**. The open document is converted to PDF and saved as specified or
    added to an existing PDF.

Chapter 6:   Protecting Attachments

This chapter describes the Workshare Protect functionality with regard to identifying content risk in emails and their attachments. It includes the following sections:

- **Introducing Attachment Protection**, page 146, introduces how Workshare Protect protects your files when sending by email.

- **Interactive Protect**, page 150, describes how to use Interactive Protect to secure your emails.

- **Using the Protect Profile Dialog**, page 159, describes how to send secure emails using the Workshare Protect Profile dialog.

- **Using the Email Security Dialog**, page 165, describes how to send secure emails using the Workshare Protect Email Security dialog.

- **Sending Links to your Files**, page 178, describes how to use the secure file transfer functionality to upload attachments to Workshare online and send recipients links to the files.

Introducing Attachment Protection

Note: This chapter describes how to protect documents when emailing by removing metadata or converting to PDF or using secure file transfer. The protection of documents on your desktop is described in Chapter 5: Protecting Documents.

Workshare Protect provides security and protection for email attachments. It is able to process the emails you send to ensure security in the following ways:

- Remove metadata from attachments
- Convert attachments to PDF or PDF/A
- Send attachments to a secure location and send recipients a link to that location
- Compress multiple attachments into a single zip file

Whether Workshare Protect processes your emails is determined by the **Apply Workshare Protect** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category). Your administrator may have selected that Workshare Protect processes emails to external recipients only, emails to internal recipients only, all emails or no emails.

When Workshare Protect is "on", the user experience when sending emails will vary depending on which option your administrator has selected for the **After an email with attachments is sent show** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category).

Interactive Protect	▾
Interactive Protect	
Protect Profile dialog using desktop profiles	
Protect Profile dialog using server profiles	
Email security dialog for all mail	
Email security dialog for internal mail only	
Email security dialog for external mail only	
No dialog (process actions transparently)	

When sending emails, you may experience one of the following three options:

- Interactive Protect panel
- Protect Profile dialog
- Email Security dialog

Interactive Protect panel
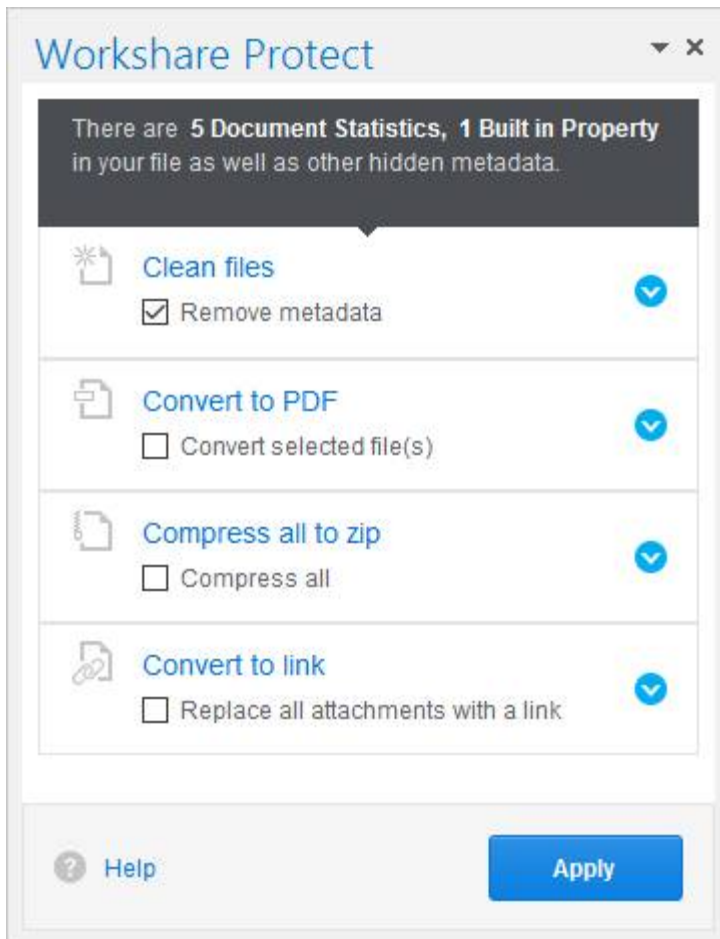
The Interactive Protect panel is displayed when **Interactive Protect** has been selected for the **After an email with attachments is sent show** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category).

The Interactive Protect panel is described in *Using Interactive* Protect.

Protect Profile dialog
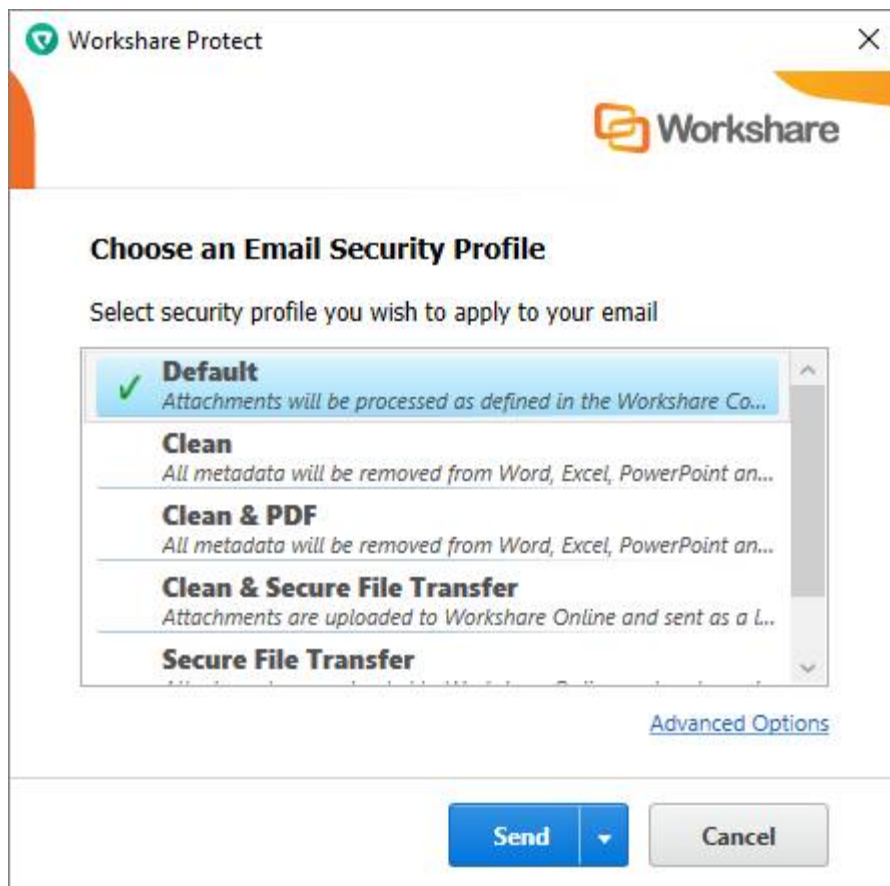
The Protect Profile dialog may be displayed in different ways depending on the option selected for the **After an email with attachments is sent show** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category).

- **Protect Profile dialog using desktop profiles**: The Protect Profile dialog is displayed after clicking **Send**. It provides a list of profiles available locally from which you can select to apply to your email (shown above).

- **Protect Profile dialog using server profiles**: The Protect Profile dialog is displayed after clicking **Send**. It provides a list of profiles available on Workshare Protect Server from which you can select to apply to your email.

The Protect Profile dialog is described in *Using the Protect Profile Dialog*.

Email Security dialog
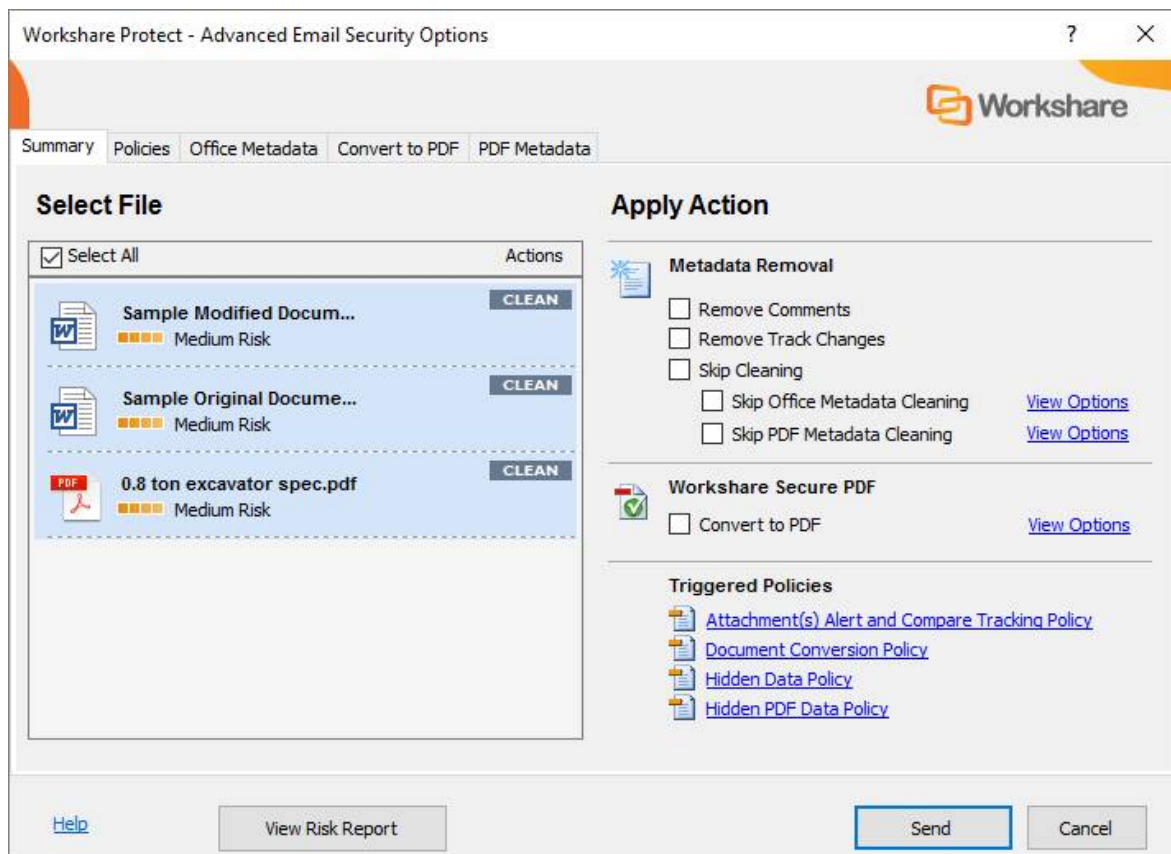
The Email Security dialog may be displayed in different circumstances depending on the option selected for the **After an email with attachments is sent show** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category).

- **Email Security dialog for all mail**: The *Email Security* dialog is always displayed. It is displayed after clicking **Send** once Workshare Protect has checked the email against the default profile.

- **Email Security dialog for internal mail only**: The *Email Security* dialog is displayed when an email has internal recipients. (For email to external recipients only, it is not displayed.) It is displayed after clicking **Send** once Workshare Protect has checked the email against the default profile.

*Note: Workshare Protect must be turned on for internal email – select **Apply Workshare Protect** for **Internal Email** in the Workshare Configuration Manager (**Protection** > **Administration** category).*

- **Email Security dialog for external mail only**: The *Email Security* dialog is displayed when an email has external recipients. (For email to internal recipients only, it is not displayed.) It is displayed after clicking **Send** once Workshare Protect has checked the email against the default profile.

> *Note: Workshare Protect must be turned on for external email – select **Apply Workshare Protect** for **External Email** in the Workshare Configuration Manager (**Protection** > **Administration** category).*

- **No dialog (process actions transparently)**: The *Email Security* dialog is not displayed. Workshare Protect processes the email and applies the default profile without any user intervention.

The Email Security dialog is described in *Using the Email Security Dialog*.

Using Interactive Protect

The Interactive Protect panel offers you options to control your documents and secure attachments before sending your email.

- **Clean files**: Enables you to clean metadata from your attachments.
- **Convert to PDF**: Enables you to convert attachments to PDF or PDF/A.
- **Compress all to zip**: Enables you to compress all attachments together into one zip file.
- **Convert to link**: Enables you to send your documents to a secure folder in Workshare online and send recipients a link to that location.

To work with Interactive Protect:

Open Outlook and create a new email. Attach one or more files. Immediately Workshare Protect reports on the metadata found in a notification across the top of your email and the Interactive Protect panel on the right side of your email.
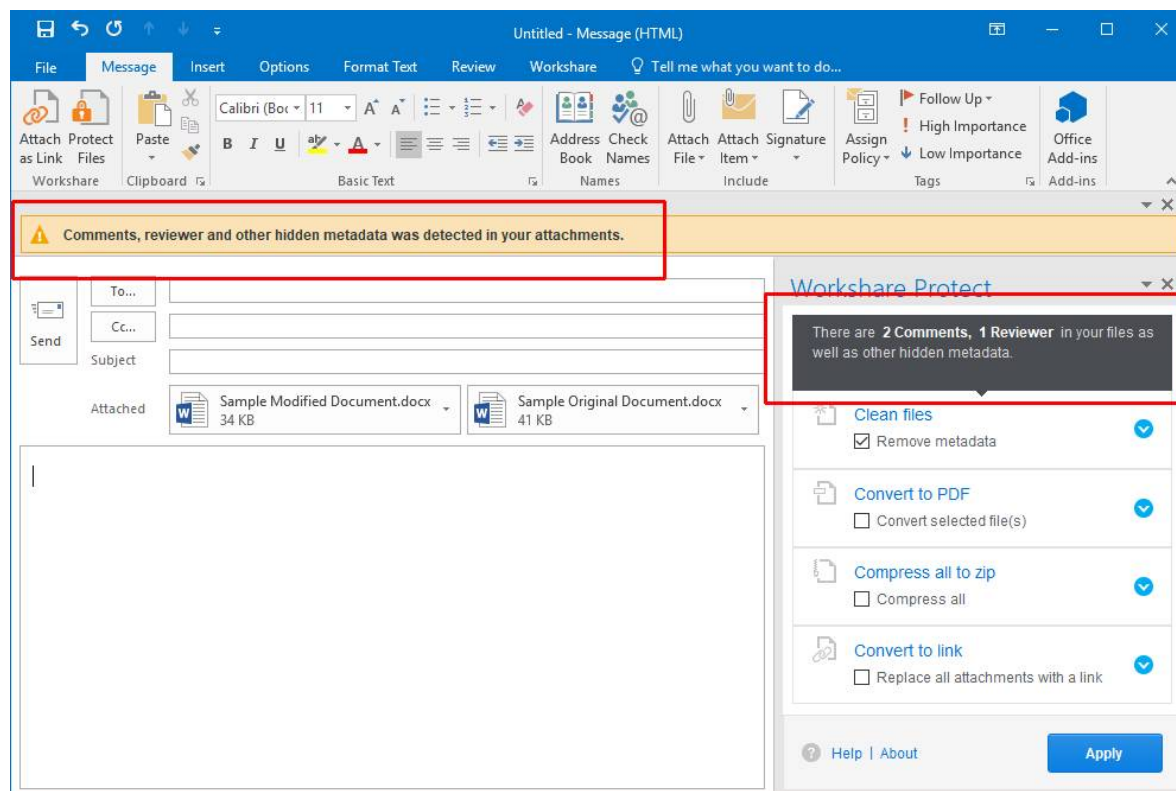
> **Note**: If the Interactive Protect panel doesn't open automatically, click the notification or click **Protect Files** in the Message tab.

Using the options in the panel, you can clean metadata from the attachments, convert them to PDF and compress them in a zip file – all before sending the email. You can preview exactly what the processed attachments will appear like to the recipients BEFORE sending the email. Additionally, you can send the attachments to a secure location in Workshare online and send a link to that location to the recipients.

After selecting the required options, you must click **Apply** and then you can write your email while the changes are being applied before finally clicking **Send** once you are confident that what you are sending is secure and safe.

If you do NOT click **Apply** before sending the email, one of two things can happen:

- If the parameter to automatically apply on send is selected in the Workshare Configuration Manager (**Protection**>**Interactive Protect** category), the Interactive Protect settings made in the panel will still be applied when you click **Send**.
- If the parameter is not selected, no processing will occur.

> *Note: If you create an email with an attachment, clean with Interactive Protect and then close the email, you are not prompted to save the email BUT the email is saved to your drafts folder.*

Cleaning metadata using Interactive Protect

In the Interactive Protect panel, you can leave the **Remove metadata** checkbox selected (this is selected by default) and click **Apply**. All metadata is removed from all the attachments.

To select specific metadata to remove from each attachment, you can expand the **Clean files** section.
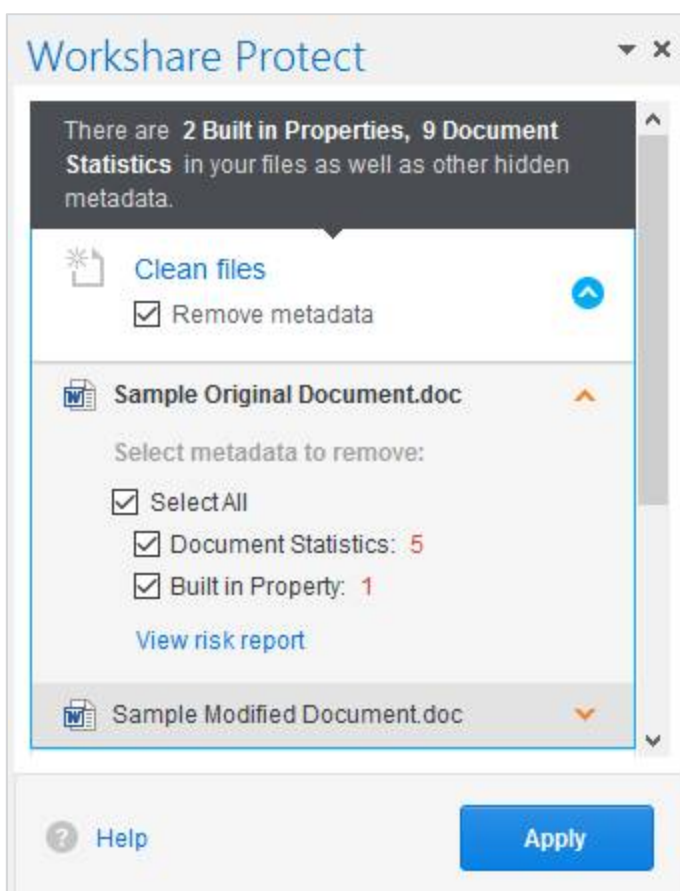
You can expand each attachment and adjust the metadata to remove for each one by selecting/deselecting the checkboxes.

> *Note: To view a detailed report of the metadata found in an attachment, click **View risk report**.*

Click **Apply** and the selected metadata is removed from each attachment.
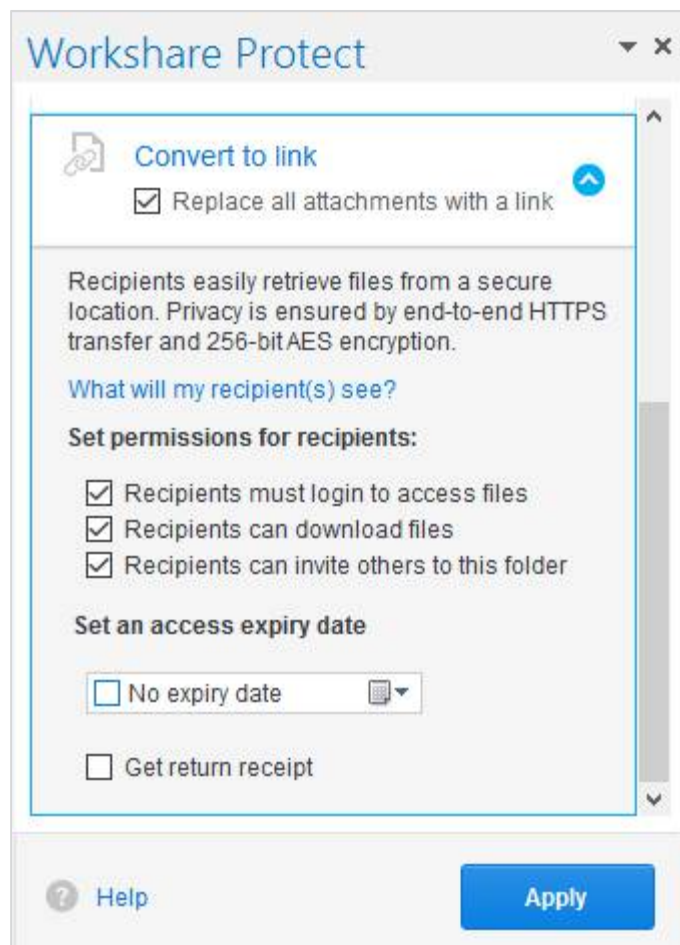
You can write your email while the attachments are being cleaned and then preview the files by opening the cleaned attachments. Finally click **Send** once you are confident that what you are sending is secure and safe.

Collaborating using Interactive Protect

When you work with Workshare online, you can send attachments to a secure location in Workshare. The attachment to your email is saved in a folder in your Workshare **Sent** folder in **Folders** and the recipient receives a link to the file.

To send a link to attachments:

1. In the Interactive Protect panel, select the **Replace all attachments with a link** checkbox.

2. To change the permissions set for the attachments in Workshare or to set an expiry date, expand the **Convert to link** section.

3. Deselect any of the following permissions for the attachments as required:

   ▫ **Recipients must login to access files**: When selected, the recipient must be a Workshare user and must log into Workshare in order to access the files.

   ▫ **Recipients can download files**: When selected, recipients can download the files.

   ▫ **Recipients can invite others to this folder**: When selected, recipients can share the folder where the attachments are stored.

4. If required, select an expiry date for the files. After this date, recipients will no longer be able to access the files.

5. Select the **Get return receipt** checkbox if you want to receive an email once the recipients have accessed the files.

6. Click **Apply**. You can write your email while the attachments are being processed and then preview the files in Workshare online by clicking the link.

> *Tip! You can clean, convert to PDF or compress the attachments before uploading to Workshare using options in the Interactive Protect panel.*
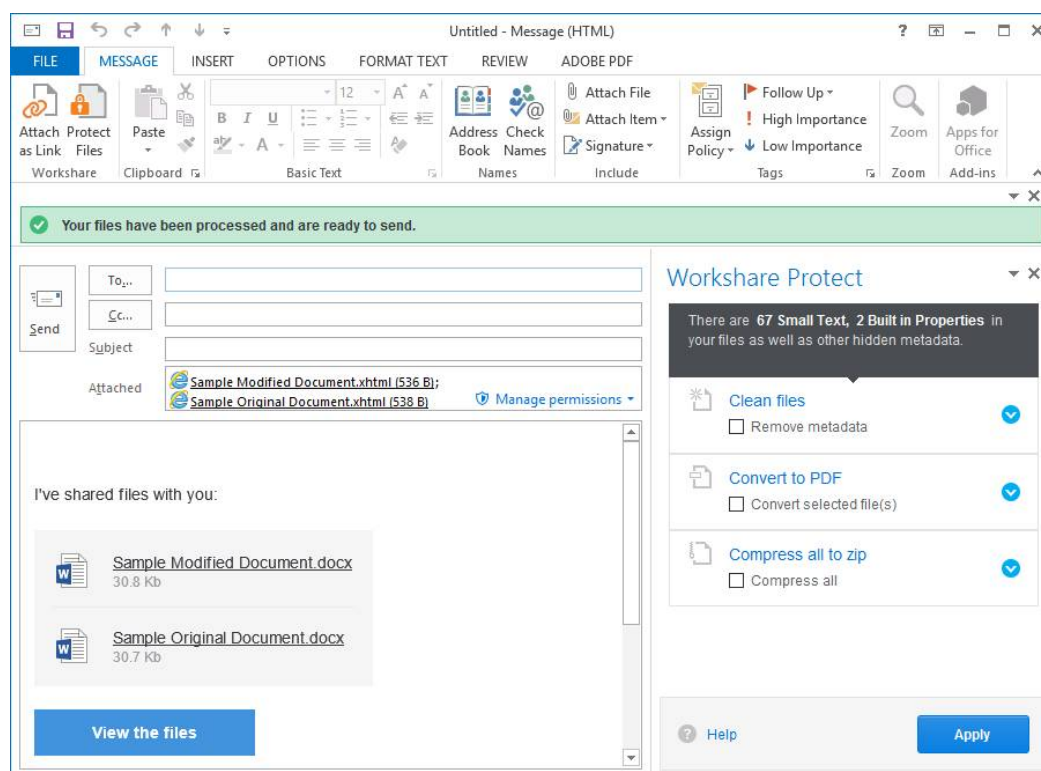
If required, click **Manage Permissions** in the attachments bar and change the permissions set for your files.

7. Finally in your email, click **Send** once you are confident that what you are sending is secure and safe.

The attachments are uploaded into a single folder in your **Sent** folder in Workshare online and in the recipients' **Received** folder. The name of the folder is whatever you entered in the **Subject** field.

The folder is created as soon as the attachments are converted to links and if you look in Workshare before you click Send, you will see the folder and the names of the files with upload pending.
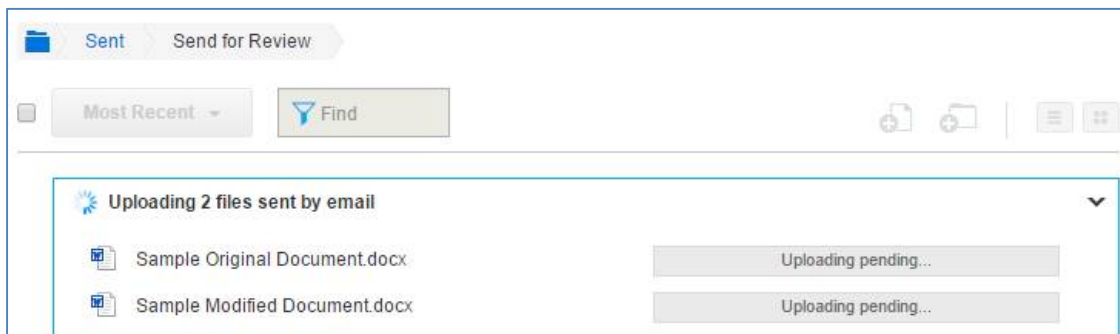
Once your email is sent, the files are uploaded to Workshare. The recipients will receive your email straightaway and they can click the link to view the files in Workshare. If the files are still uploading, upload pending is displayed.

Converting attachments to PDF using Interactive Protect

In the Interactive Protect panel, you can select the **Convert selected file(s)** checkbox in the **Convert to PDF** section and click **Apply** and all attachments are converted to PDF.

Tip! You can clean attachments before converting to PDF. You can also convert to PDF after converting your attachments to links.

To select specific attachments to convert and to specify PDF conversion settings for the attachments, you can select the **Convert selected file(s)** checkbox and expand the **Convert to PDF** section.

- Deselect any attachments you do NOT want converting to PDF.
- Select whether to convert the attachments to PDF or PDF/A.
- Select all or some of the following security options:
  - **Print:** Enables recipients to print PDF files.
  - **Edit Text:** Enables recipients with Adobe Distiller to edit PDF files.
  - **Copy text and/or graphics:** Enables recipients to copy graphics or text directly from PDF files.
  - **Add comments:** Enables recipients with Adobe Distiller to add comments to PDF files.

Note: These options are not available if you selected PDF/A.

- If required, set a password to protect the PDF files by entering the password twice. When a password is specified, recipients can only open the PDF files after entering this password.

> *Note*: *This option is not available if you selected PDF/A.*

Click **Apply** and the selected PDF settings are applied to all attachments that you have selected to convert to PDF.
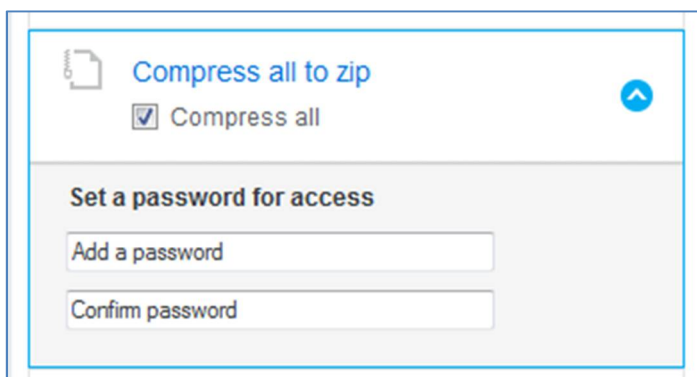
You can write your email while the attachments are being converted and then preview the files by opening the converted attachments. Finally click **Send** once you are confident that what you are sending is secure and safe.

Compressing attachments using Interactive Protect

In the Interactive Protect panel, you can select the **Compress all** checkbox in the **Compress all to zip** section and click **Apply** and all attachments are compressed into a single zip file.

> *Tip! You can clean attachments before compressing and then upload the zip file to Workshare online.*

To set a password for the zip file, you can select the **Compress all** checkbox and expand the **Compress all to zip** section.

If required, set a password to protect the zip file by entering the password twice. When a password is specified, recipients can only open the zip file after entering this password.

Click **Apply** and all the attachments are compressed into a single zip file called **Attachments.zip**.

You can write your email while the attachments are being compressed and then preview the files by opening the zip attachment. Finally click **Send** once you are confident that what you are sending is secure and safe.

Password-protected files and Interactive Protect

When you attach a password-protected file, Workshare cannot clean or convert the file unless you enter the password. Warnings are shown in your email window as follows:
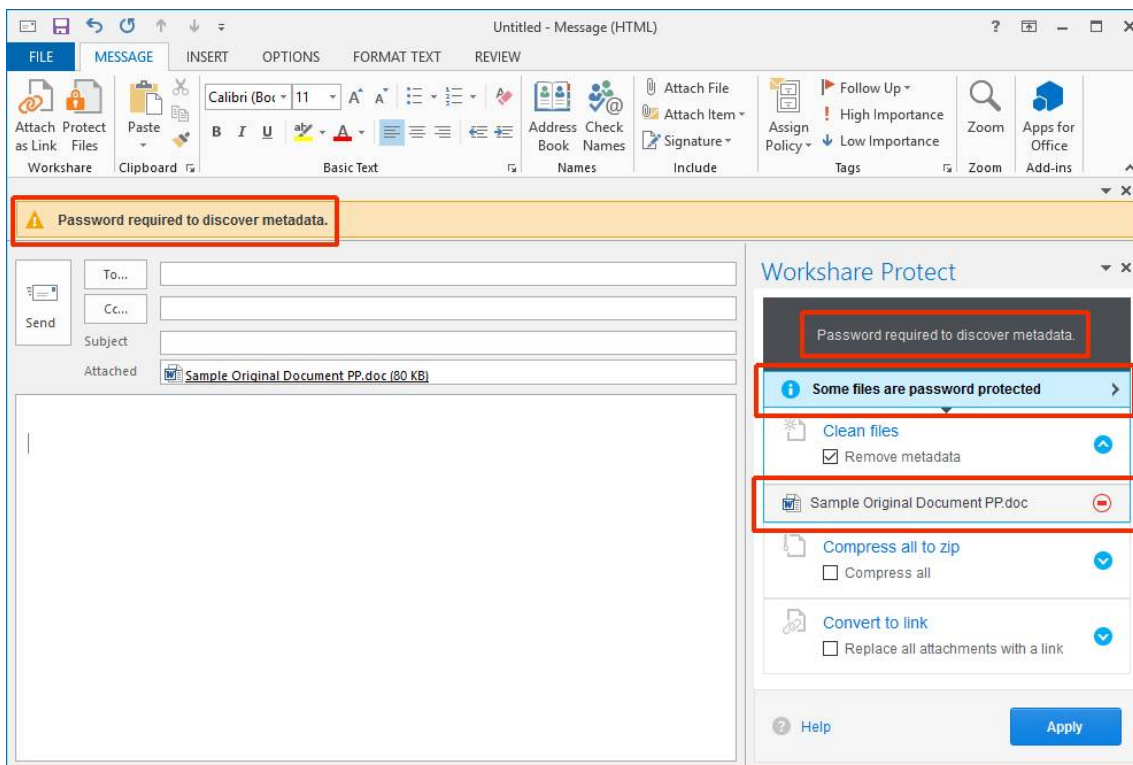
In order to proceed and clean the attachment or convert it to PDF, you must enter the open/modify password.

Click the ⊖ icon. The *Password required* dialog is displayed.
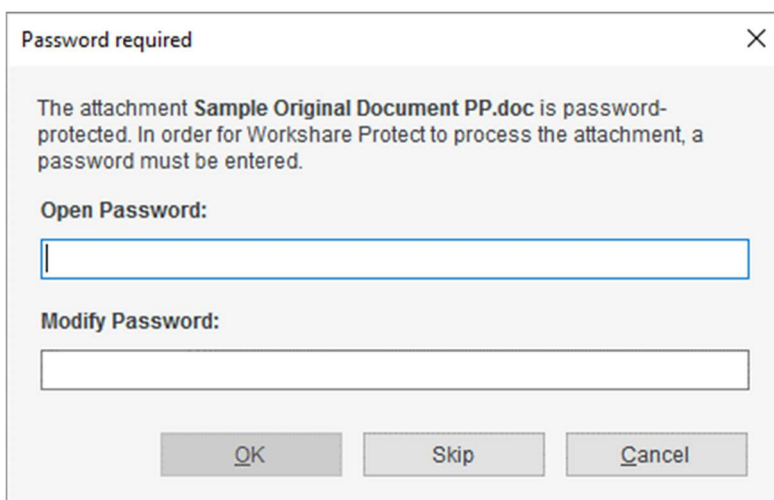
Enter the open or modify passwords (or both) and click **OK**.

You will now be able to expand the attachment in the Interactive Protect panel and select which metadata to remove or whether to convert the attachment to PDF.

Note: You can send links to password-protected attachments and compress them without the need to enter the open/modify password.

Using the Protect Profile Dialog

The *Protect Profile* dialog provides a simple UI that enables you to select what profile to apply to your emails.

A profile is a collection of policies that include a set of instructions to Workshare Protect as to what metadata to remove from an email attachment, whether to convert the attachment to PDF and whether to upload the attachment to Workshare online and send a link instead.

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.

Your administrator defines profiles. Your administrator may have adopted a task-based approach or recipient-based approach when creating profiles:

- **Task-based profiles**: For example, you are working on a legal document and sending it to colleagues to receive input. You email it and select the "Working Draft" profile which will remove metadata but keep track changes and comments. After receiving input and implementing changes, you email it and select the "Final Draft" profile which will remove metadata and remove track changes and comments. Once you are happy with the document, you email it and select the "Final" profile which will remove metadata, track changes and comments and convert the document to PDF.

- **Recipient-based profiles**: For example, your company has a policy that whatever documents you send to opposing counsel, the metadata must be removed and the document must be converted to PDF. You therefore have a profile called "opposing counsel" which removes metadata and converts to PDF. You also have a profile called "Personal" which does nothing.

These are just examples of the types of profiles that might be defined. If you have any questions or requirements regarding the profiles, contact your administrator.

To send an email:

1. Create a new email, attach the required document(s) and click **Send**. The *Protect Profile* dialog is displayed.
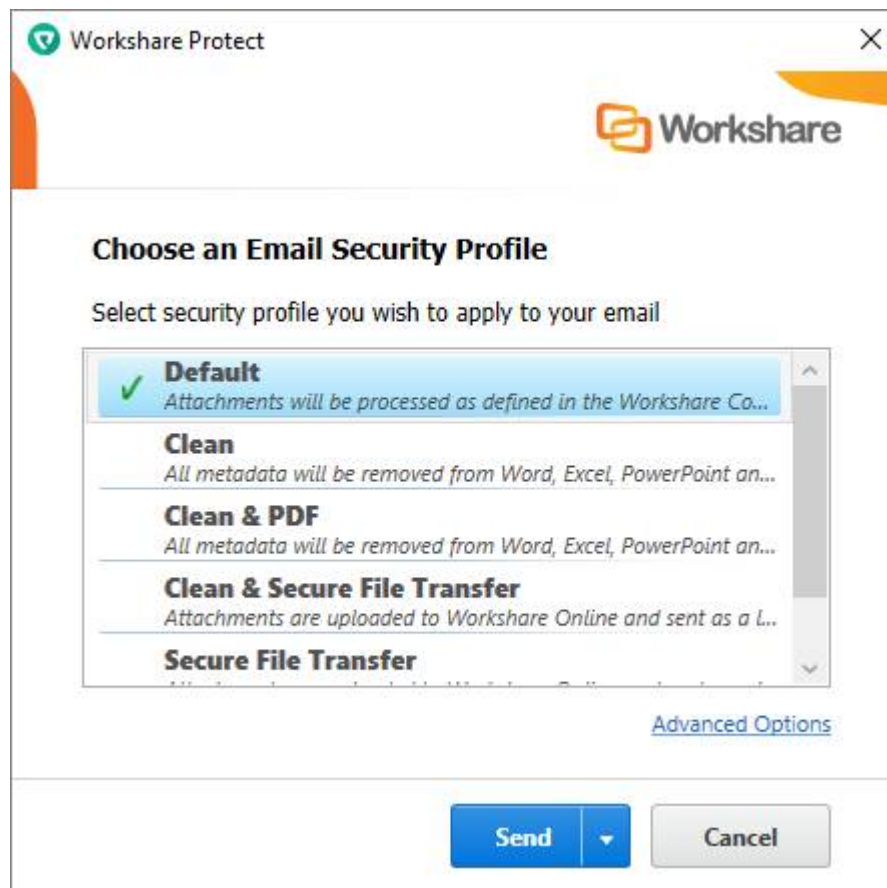
2. Select the profile you want to apply to your attachments and click **Send**. The following profiles are provided with Workshare Protect:

   □ **Default**: Attachments are processed according to the settings in the Workshare Configuration Manager.

   □ **Clean**: All metadata is cleaned from Microsoft Word, Excel, PowerPoint and PDF attachments.

   □ **Clean & PDF**: All metadata is cleaned from Microsoft Word, Excel, PowerPoint and PDF attachments and Microsoft Word, Excel and PowerPoint attachments are also converted to PDF.

   □ **Clean & Secure File Transfer**: All metadata is cleaned from Microsoft Word, Excel, PowerPoint and PDF attachments and then the attachments are uploaded to Workshare online and recipients are sent a link to the attachments. Refer to *Secure File Transfer Profiles*, page 161.

   □ **Secure File Transfer**: Attachments are uploaded to Workshare online and recipients are sent a link to the attachments. Refer to *Secure File Transfer Profiles*, page 161.

If you want to send your email without Workshare Protect processing the attachments, click the arrow on the **Send** button and select **Send without processing**.

If you want to access *the Email Security* dialog and specify personal settings or individual settings for each attachment, click the **Advanced Options** link. The *Email Security* dialog is displayed with options matching the profile selected. Refer to *Using the Email Security Dialog*.

Note: Your administrator may not have enabled the Secure File Transfer profiles or the Send without processing option or the Advanced Options link.

Secure file transfer profiles

You can upload almost any file to Workshare online and send any recipient a link to where the document is stored. All recipients will be able to view the document in Workshare online in a browser and those recipients who have a Workshare account will also be able to collaborate on the documents by adding comments in real-time and uploading versions.

To securely transfer files:

1. Create a new email, enter the recipient email addresses and attach the required document(s).

2. Click **Send**. The *Protect Profile* dialog is displayed.

3. Select **Secure File Transfer** or **Clean & Secure File Transfer** (if you want to remove metadata from the attachments before uploading them to Workshare online).
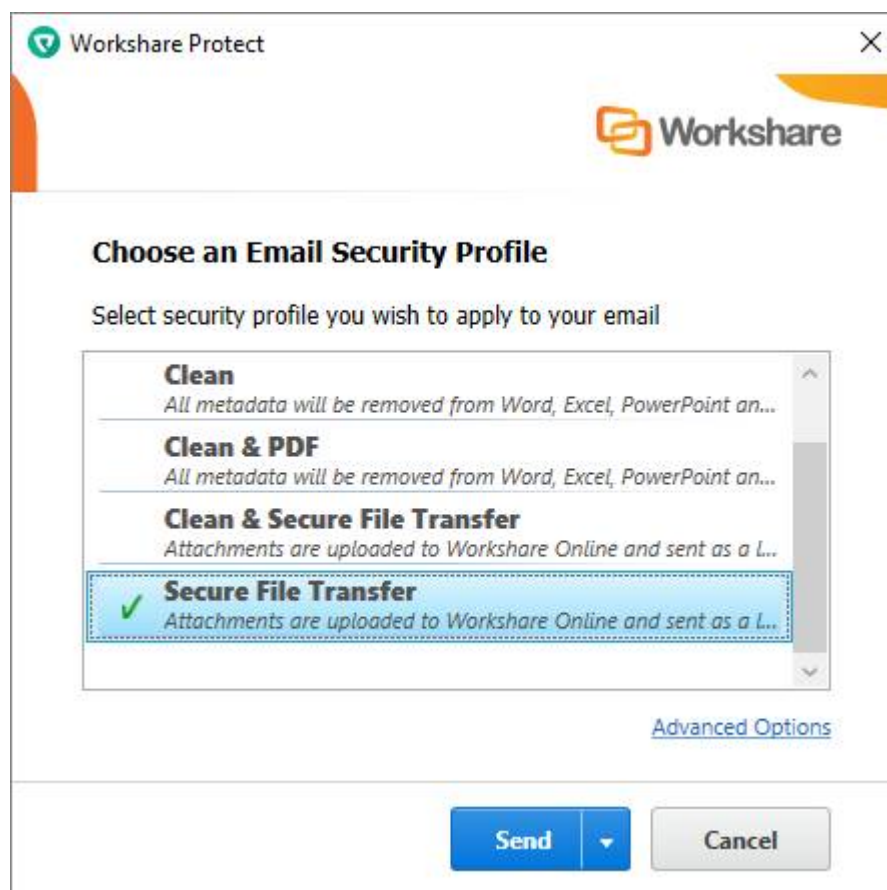
> *Note: Click **Advanced Options** if you want to configure specific user access to the documents in Workshare. Refer to Setting advanced options.*

4. Click **Send**. The attached files are uploaded into a single folder in your **Sent** folder and the recipients **Received** folder (in **Folders** in Workshare online). The name of the folder is whatever is entered into the **Subject** field of the email followed by the date and time.

Setting advanced options

If your administrator has given you the rights to access the advanced options, you can set access rights to documents that you upload to Workshare online to control recipient access. Clicking **Advanced Options** in the *Protect Profile* dialog enables you to configure specific user access to the documents you are uploading to Workshare online.

To configure advanced options:

1. Create a new email, enter the recipient email addresses and attach the required document(s).

2. Click **Send**. The *Protect Profile* dialog is displayed.

3. Select **Secure File Transfer** or **Clean & Secure File Transfer** and click **Advanced Options**. The *Advanced Email Security Options* dialog is displayed.

4. Select the **Secure File Transfer Action** tab.
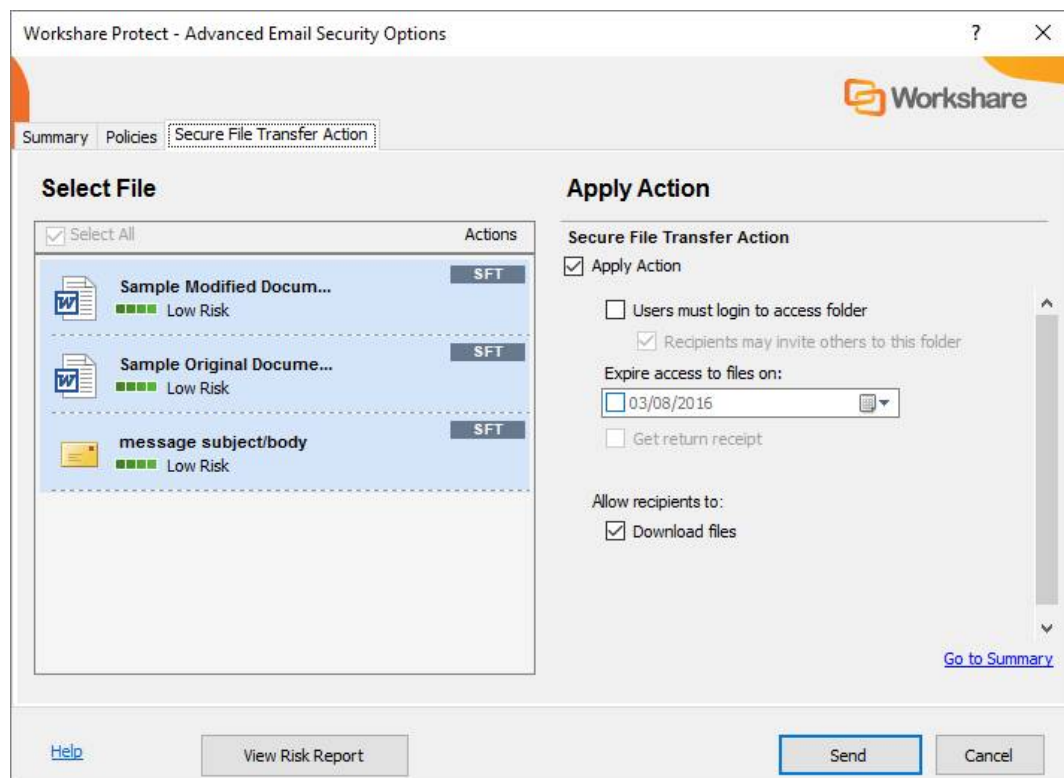
5. You can configure the following parameters:

Apply Action	When selected the selected profile (**Secure File Transfer** or **Clean & Secure File Transfer**) is applied to the email. When not selected, the email is sent without a profile being applied.
Users must login to access folder	When selected, the recipient must log into Workshare in order to access the file. When not selected, the recipient can access Workshare without being a registered user to view and download the file only.
Recipients may invite others to this folder	When selected, recipients can forward the link to other recipients who will be able to access the file. Unless **Users must login to access folder** is selected, this option is always selected.

Expire access to files on:	You can specify an expiry date for the file. After this date, the recipient will no longer be able to access the file.
Get return receipt	When selected, you will receive an email once the recipient has accessed the file.
Download files	When selected, recipients can download the file.

> *Note: The default settings of these parameters are set in the Workshare Policy Designer.*

6. You specify these settings for the files selected on the left side. So you can select multiple files and set the same settings for all or you can select an individual file and specify settings individually.

7. Click **Send**. The attached files are uploaded into a single folder in your **Sent** folder and the recipients **Received** folder (in **Folders** in Workshare online). The name of the folder is whatever is entered into the **Subject** field of the email followed by the date and time.

Receiving links to files in Workshare online

Recipients of emails sent using secure file transfer from the *Protect Profile* dialog receive an email with details of the name of the file and a link to click to access the file in Workshare online. The means of access and options available to the recipient will vary depending on whether the recipient is a Workshare user and the settings specified by the sender. Scenarios include:

- When a recipient is a Workshare user, clicking the link displays the location in Workshare online where the file (or files) is stored. The file or files are stored in a folder with a name that matches the subject of the email. This folder appears in the recipient's **Received** folder (in **Folders** in Workshare online). The recipient can add comments to the file, upload versions and make changes to the folder where the file is stored.

- If the sender has specified that the recipient need not be a Workshare user, clicking the link displays the location in Workshare online where the file (or files) is stored. The recipient can view the file and download it.

- If the sender has specified that the recipient must be logged in to Workshare, clicking the link displays the Workshare login and the recipient must first log in to Workshare in order to view the file (or files) and download it.

- If the sender has specified an expiry date then the link will only work until the expiry date. Once the date has passed, the recipient will not be able to access the file.

Using the Email Security Dialog

When you send an email using the *Email Security* dialog configuration, Workshare Protect checks any attachments to see if they breach any security policies defined in the default profile. A security policy defines the conditions that must exist in order for Workshare Protect to detect content risk and the actions that should be taken when the conditions are met (i.e. content risk is found).

When deciding which policy to apply, Workshare Protect checks each recipient. If an external recipient is found, external policy settings are applied. Only if all recipients are internal, are internal policy settings applied. For example, an attached document could contain hidden data that should not be sent to external parties but is suitable for distribution internally.

The options available to you depend on the security policies in place in your organization and the action specified for a policy breach. The different actions are as follows:

- **Block Action**: This action blocks your attempts to send the email until the offending information is removed. See *Resolving blocked emails* for more information.

- **Alert Action**: This action alerts you to content risk contained within your email, although you are still able to send the email. See *Reviewing alerts* for more information.

- **Clean Action/Lightspeed Clean Action/PDF Clean**: This action cleans the attachments before sending the email. See *Cleaning hidden data from attachments* for more information.

- **PDF Action**: This action converts attached documents to PDF before sending the email. See *Converting attachments to PDF* for more information.

*Note: Workshare Protect will only check attachments of emails sent internally or externally (or both) if Workshare Protect is turned on for internal or external emails (or both). This is done using the **Apply Workshare Protect** parameter in the Workshare Configuration Manager (**Protection** > **Administration** category). If you have queries about your email security settings, refer to your administrator.*

Password-protected documents

When an attachment is encrypted (password-protected), Workshare Protect requires the password in order to check the document. Password-protection here refers to the file encryption functionality available in Microsoft Word where the user can set a password that must be entered in order to **open** or **modify** the document.

*Note: This functionality is available by clicking the File menu/Office button, selecting **Save As** and from the Save As dialog, clicking **Tools** and then selecting **General Options**.*

When sending an email with an attachment that requires a password in order to be opened or modified, a *Password* dialog is displayed. For example,

```
┌─────────────────────────────────────────────┐
│ Password                                  ✕  │
├─────────────────────────────────────────────┤
│                                             │
│  This attachment is encrypted:              │
│  Sample Original Document PP.doc            │
│                                             │
│                                             │
│  To bypass scanning for this attachment,    │
│  click Skip.                                │
│  To abandon sending the email, click Cancel.│
│                                             │
│  Open Password                              │
│  ┌─────────────────────────────────────┐    │
│  │                                     │    │
│  └─────────────────────────────────────┘    │
│  Modify Password                            │
│  ┌─────────────────────────────────────┐    │
│  │                                     │    │
│  └─────────────────────────────────────┘    │
│                                             │
│         [ OK ]   [ Skip ]   [ Cancel ]      │
└─────────────────────────────────────────────┘
```

Enter the password required to open the document in the **Open Password** or **Modify Password** field and click **OK**, or you can click **Skip** and Workshare Protect will not check the document.

Protected documents

When an attachment is a protected document, Workshare Protect also requires the password in order to check the document. Protected document refers to the "Protect Document" functionality available in Microsoft Word where the user can restrict specific users from editing specific sections of the document. The protection settings are protected by a password.

> *Note: This functionality is available from the **Review** tab (**Protect** group) – click **Restrict Editing**.*

When sending an email with an attachment that is a protected document, a *Password* dialog is displayed. For example,
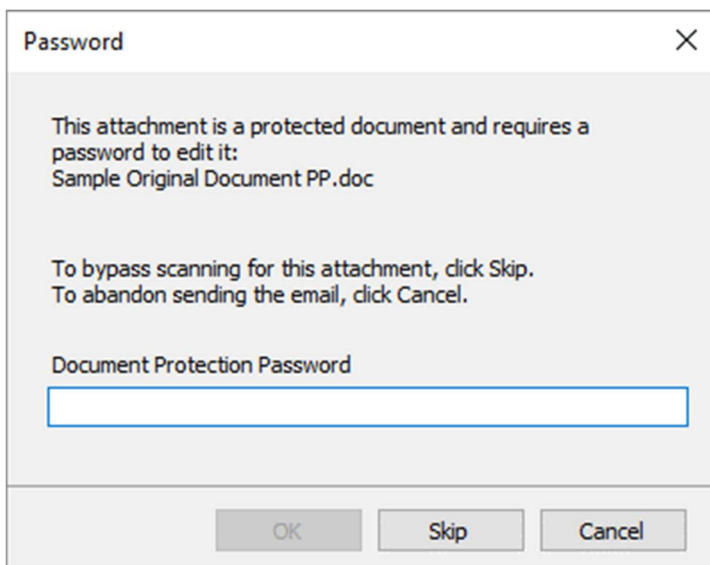
Enter the password required to open the document in the **Document Protection Password** field and click **OK**, or you can click **Skip** and Workshare Protect will not check the document.

Send and Protect

Your administrator may have configured Workshare Protect to include a **Send and Protect** button in your message window. If so, you can click this button instead of clicking **Send** and the *Email Security* dialog will always be displayed – regardless of how the **When sending an email with attachments show** parameter is configured in the WCM. You can then select to clean attachments or convert attachments to PDF as required.

Sending emails

The following procedure describes how to send emails using the *Email Security* dialog.

To send an email:

Create a new email, attach the required document(s) and click **Send**. Workshare Protect checks the email against the default profile and the *Email Security* dialog is displayed.
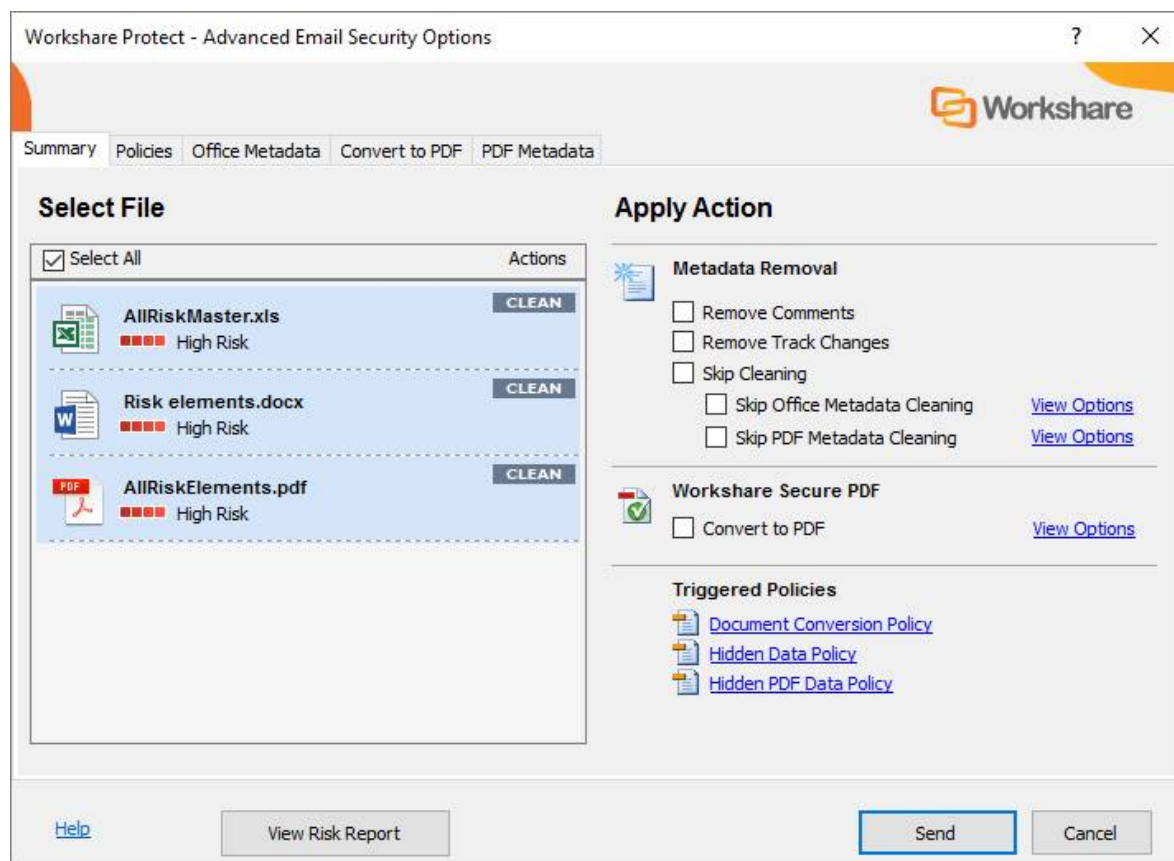
This dialog alerts you to any breaches of security policies in the default profile triggered by your email or its attachments. If your administrator has given you permissions, you can modify the settings for each attachment. Refer to *Quick tour of the Email Security dialog* for further information about the options available.

Click **Send** and Workshare Protect processes the email as specified.

Quick tour of the Email Security dialog

The *Email Security* dialog includes several tabs. The number of tabs may vary according to the policies triggered but there will always be a **Summary** tab and a **Policies** tab.

> *Tip!* Click **View Risk Report** *if you want to print a risk report detailing the content risk discovered in the attached document(s). The risk report enables you to evaluate the content risk contained in the selected attachments.*

Select File area

The **Select File** area is the same in every tab. It includes a list of the email attachments that have triggered a policy.
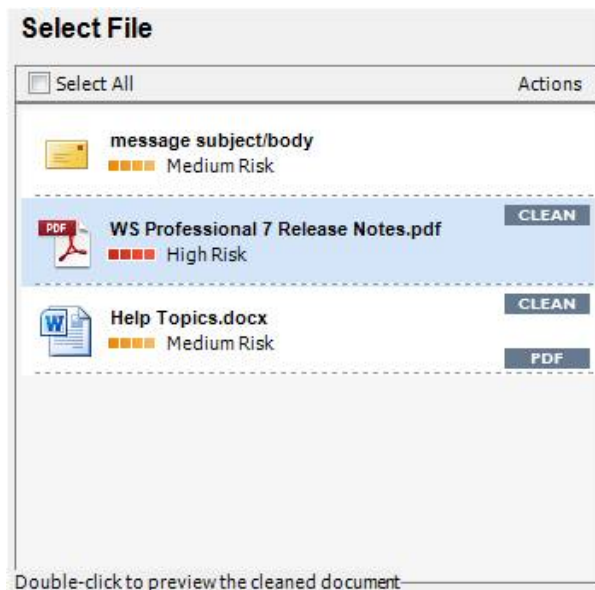
For each item, you can see the risk level and the actions to be applied to the item. You can select individual attachments or select the entire list by selecting the **Select All** checkbox. When a Clean or PDF action is to be applied, you can double-click an item in the list to preview what it will look like once the actions have been applied. For example, if an attachment in DOCX format will have the PDF action applied, double-clicking this DOCX attachment will enable you to preview it as a PDF.

Summary tab

The **Apply Action** area of the **Summary** tab provides one-click checkboxes to change details of the Clean and PDF actions as well as a list of triggered policies which provides links to the policies that triggered the actions.

Under **Metadata Removal**, selecting **Remove Comments** or **Remove Track Changes** cleans comments or track changes from the selected attachment. Selecting one of the **Skip Cleaning** options means the selected attachment is not cleaned at all. Click **View Options** to display all options in the **Office Metadata/PDF Metadata** tabs.

Under **Workshare Secure PDF**, selecting **Convert to PDF** means the selected attachment is converted into PDF. Click **View Options** to display all options in the **Convert to PDF** tab.

Under **Triggered Policies**, there is a list of policies triggered by the email and its attachments. Click the name of a policy to see more information about the policy in the **Policies** tab.

> *Note: The availability of checkboxes and options may appear differently depending on your organization's security policies included in the default profile. Any options that are disabled have been locked. Refer to your system administrator if you need to override these settings.*

Policies tab

The **View Policies** area on the right side of the **Policies** tab provides detailed information about the policies breached by the email and it attachments.

In the **Policies** tab, you can discover more information about what caused a breach of policy. Click **More**/**Less** to display/hide details of each policy as required.

Other tabs

The **Office Metadata** tab is included in the *Email Security* dialog when a Clean or Lightspeed Clean action is triggered for an Office file. Refer to *Cleaning hidden data from attachments*, for more information.

The **PDF Metadata** tab is included in the *Email Security* dialog when a PDF Clean action is triggered for a PDF file. Refer to *Cleaning hidden data from attachments,* for more information.

The **Convert to PDF** tab is included in the *Email Security* dialog when a PDF action is triggered. Refer to *Converting attachments to PDF*, for more information.

The **ZIP Options** tab is included in the *Email Security* dialog when a Zip action is triggered.

The **Secure File Transfer Action** tab is included in the *Email Security* dialog when a Secure File Transfer profile is selected in the *Protect Profile* dialog. Refer to *Secure file transfer profiles*.

Resolving blocked emails

Every time you send an email with an attachment, Workshare Protect checks the attachment to see if it breaches any security policies in the default profile.

Your system administrator can define policies that block any attempt to send emails containing certain pre-defined policy triggers. An attempt to send an email or attachment that contains one of these policy triggers results in the email being blocked. If an email is blocked, the conditions that caused it to be blocked (content, attachment, or recipients) must be removed before the email can be sent.

When you send an email that triggers a **Block** action, Workshare Protect notifies you that your email has been blocked.
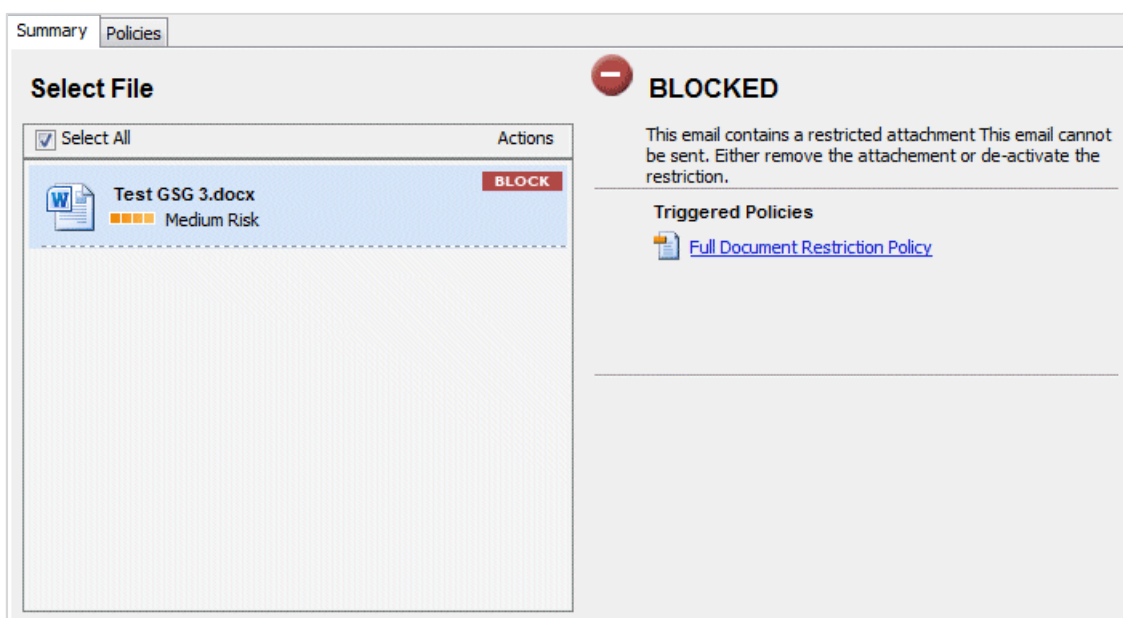
To resolve blocked emails:

1. Click the name of the policy in the **Triggered Policies** list or select the **Policies** tab to view what content has triggered the email policy.

2. Click the **Close** button to close the *Email Security* dialog.

3. Make the appropriate changes to the email and/or document(s) by removing or modifying the content, attachments or recipients that caused your email to be blocked.

4. If making changes to attachments, re-attach the corrected documents.

5. Click **Send**. If you have made all the relevant changes, you should now be able to send the email successfully.

Reviewing alerts

Every time you send an email with an attachment, Workshare Protect checks the attachment to see if it breaches any security policies in the default profile.

Your system administrator can define policies that contain certain pre-defined policy triggers that alert you to content risk in emails and documents when they are sent by email. The **Alert** action provides information about content or attachments that might violate policy, but does not require that the content be removed before sending the email.

When you send an email that triggers an **Alert** action, Workshare Protect notifies you that your email and/or attachment(s) contain content risk.

To find out more about what triggered a policy, click the name of the policy in the **Triggered Policies** list or select the **Policies** tab. The **Policies** tab is displayed showing the policies triggered on the right side. Click **More**/**Less** to display/hide details of each policy as required. If required, you can make changes to your email or the attached documents to take account of the content risk discovered.

When you are ready to send the email, click **Send**.

Cleaning hidden data from attachments

Every time you send an email with an attachment, Workshare Protect checks the attachment to see if it breaches any security policies in the default profile.

Your system administrator can define policies that contain certain pre-defined policy triggers that oblige you to clean hidden data from attached documents when they are sent by email. The **Clean**, **Lightspeed Clean** and **PDF Clean** actions remove hidden data, such as track changes, hidden text, comments, markup and more, from attachments. Lightspeed cleaning is much faster than regular cleaning and is the default setting.

When you send an email that triggers a **Clean**, **Lightspeed Clean** or **PDF Clean** action, Workshare Protect notifies you that your email and/or attachment(s) will be cleaned.

> **Note:** For more information on the types of hidden data contained within Microsoft Office documents, see Cleaning options.

If your administrator has enabled you to override the clean hidden data settings and you do not want to clean the attachment(s), you can select the **Skip Cleaning** checkbox (or either of the **Skip Office Metadata Cleaning** or **Skip PDF Metadata Cleaning** checkboxes individually) in the **Apply Action** area.

To clean hidden data:

1. Select the attachment in the **Select File** list to specify individual options for a single attachment or select the **Select All** checkbox to select all attachments. Any settings will then be applied to all attachments.

2. Click **View Options** in the **Metadata Removal** area or select the **Office Metadata** tab. The **Office Metadata** tab displays the different hidden data cleaning options for Microsoft Office attachments.
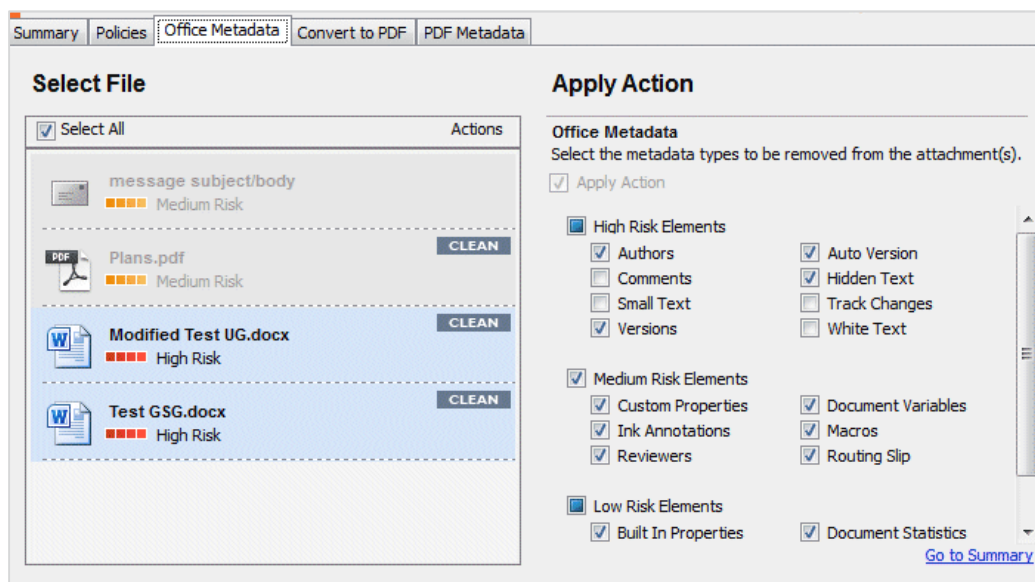
3. Select the hidden data that you want to remove by selecting or deselecting the relevant checkboxes.

4. Click **View Options** in the **Metadata Removal** area of the **Summary** tab or select the **PDF Metadata** tab to display the different hidden data cleaning options for PDF attachments.
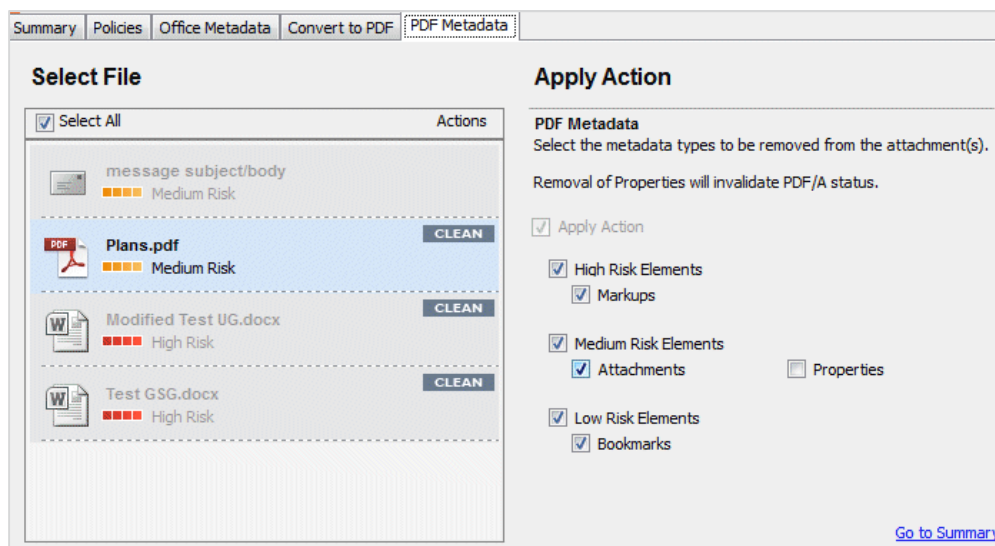
5. Select the hidden data that you want to remove by selecting or deselecting the relevant checkboxes.

> **Note:** *The availability of these options is dependent on whether your administrator has enabled you to override the cleaning options in the policy settings. Refer to your system administrator if you need to override these settings and they are disabled.*

6. Repeat for additional attachments if required.

7. Click **Send** to send the email.

Workshare Protect cleans the hidden data from the attached document(s) according to your settings before sending the email.

Converting attachments to PDF

Every time you send an email with an attachment, Workshare Protect checks the attachment to see if it breaches any security policies in the default profile.

Your system administrator can define policies that contain certain pre-defined policy triggers that force you to convert documents to PDF when they are sent by email. This prevents the document from being edited, ensuring that its formatting remains intact. Additional security features enable you to prevent recipients from printing, editing, copying from or adding comments to the PDF attachment.

When you send an email that triggers a **PDF** action, Workshare Protect notifies you that your attachment(s) will be converted to PDF.

If your administrator has enabled you to override the PDF settings and you do not want to PDF the attachment(s), you can deselect the **Convert to PDF** checkbox in the **Apply Action** area.

To convert attachments to PDF:

1. Select the attachment in the **Select File** list and click **View Options** in the **Workshare Secure PDF** area or select the **Convert to PDF** tab. The **Convert to PDF** tab displays the different PDF security settings available.

> **Note:** You can specify individual PDF settings for each attachment or select the **Select All** button.

2. Select one or more of the following security options:
   - **Prevent printing** to prevent recipients from printing the PDF document.
   - **Prevent editing of text** to prevent recipients with Adobe Distiller from editing the PDF document.
   - **Prevent the copying of text and/or graphics** to prevent recipients from copying graphics or text directly from the PDF document.
   - **Prevent comments being added** to prevent recipients with Adobe Distiller from adding comments to the PDF document.

> **Note:** Highlighting text and adding a strikethrough in a PDF is not considered editing the text. If you want to prevent users doing this, select **Prevent comments being added** as well as **Prevent editing of text**.

3. If required, set a password for access to the PDF by entering the password twice in the relevant fields.

4. If required, select the **Reconstruct Hyperlinks** checkbox to preserve standard URL and bookmark hyperlinks.

> ***Note:*** *Selecting the **Reconstruct Hyperlinks** option can increase the time it takes to create a PDF document. Hyperlinks that are preserved using this option may not correspond exactly to the location in the original document.*

5. Select the **PDF/A** checkbox to convert the attachment to PDF/A.

6. Repeat steps 2 to 5 for additional attachments if required.

7. Click **Send** to send the email.

Workshare Protect converts the attachments to PDF or PDF/A and applies your settings before sending the email.

Sending Links to your Files

Your administrator may have configured Protect to automatically convert your attachments to links according to attachment size or using a shortcut in the attachments bar.

Links shortcut

Whatever the Protect user experience set up in your environment, when you have a "**Link**" shortcut on the attachment bar, you can convert your attachments to links in a single click.

The configuration required for this option is in the Workshare Configuration Manager as follows:

Category	Parameter	Default
Protection > Sharing	Display Link on attachments bar	Not selected

Whenever you add attachments to an email, the **Link** option is displayed in the attachments bar.
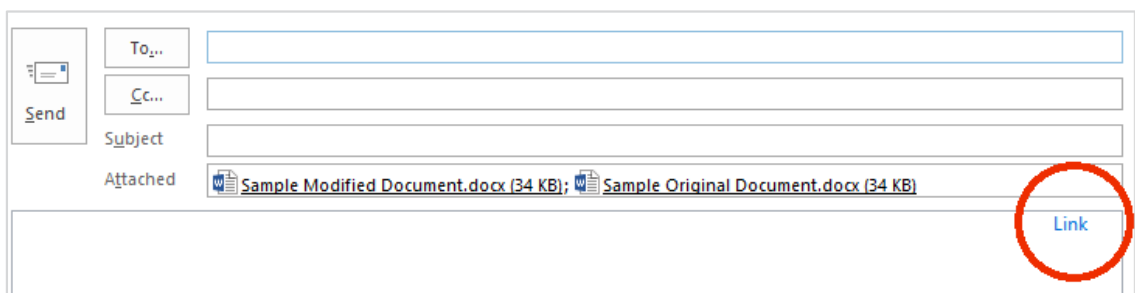
Click **Link** and your attachments are converted to links and appear in the body of your email.
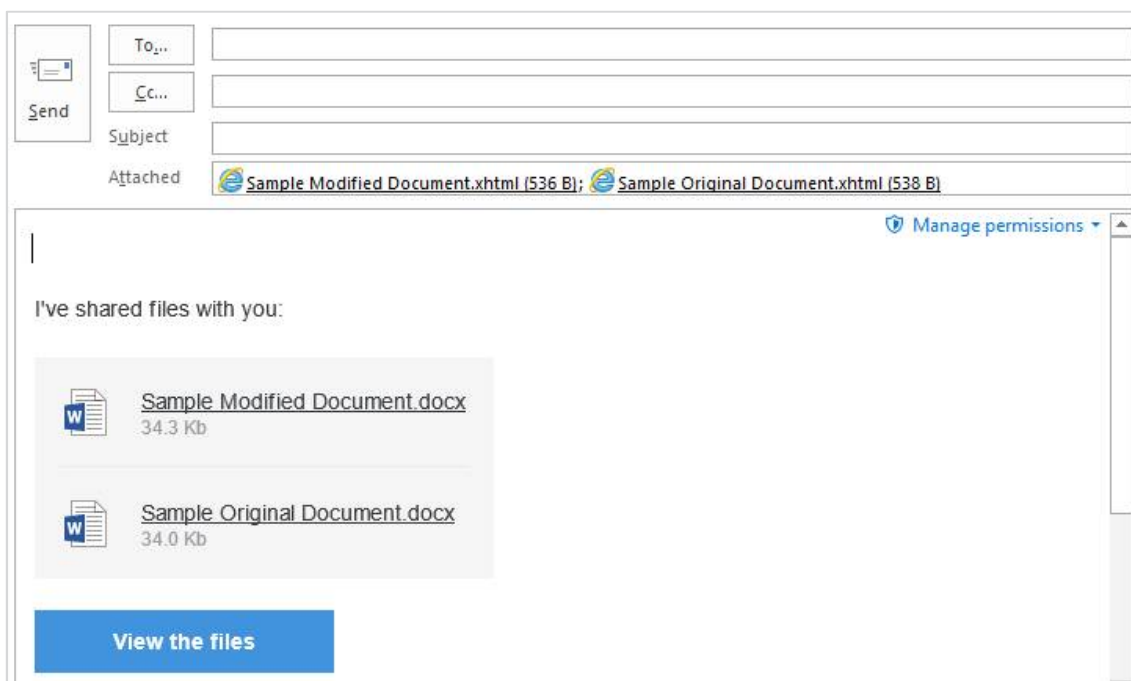
> **Note**: If required, click **Manage Permissions** in the attachments bar and change the permissions set for your files, such as whether recipients can download the files.

The attachments are uploaded into a single folder in your **Sent** folder in Workshare and in the recipients' **Received** folder. The name of the folder is whatever you enter in the **Subject** field.

The folder is created as soon as the attachments are converted to links and if you look in Workshare before you click **Send**, you will see the folder and the names of the files with upload pending.
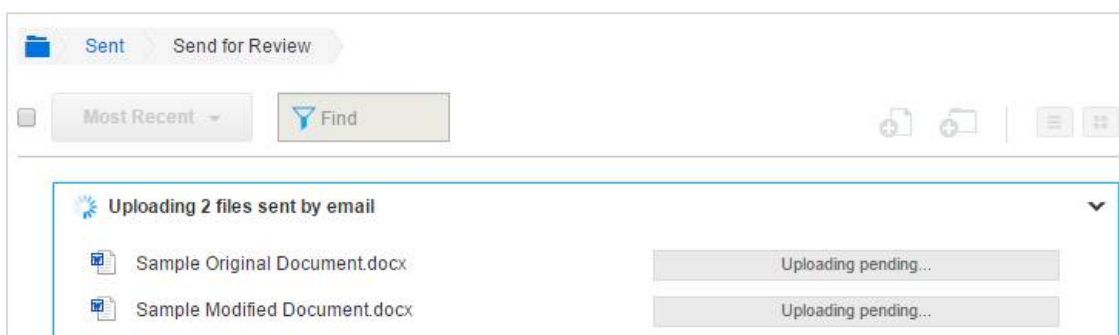
Once your email is sent, the files are uploaded to Workshare. The recipients will receive your email straightaway and they can click the file names or the **View the files** button to view the files in Workshare. If the files are still uploading, upload pending is displayed.

Large attachments

In order to avoid blocking email with large heavy files, you can upload the files to Workshare and send recipients a link to those files. There are several ways this can be done depending on your configuration.

Auto convert

The configuration required for this option is in the Workshare Configuration Manager as follows:

Category	Parameter	Default
Protection > Sharing	Automatically convert to link(s) when total attachment size exceeds (MB)	No size specified

If a limit has been set for this parameter, as soon as you attach files above this limit, they are automatically converted to links.

The links appear in the body of your email and the attachments are uploaded into a folder in Workshare.

Attach as Link button

The configuration required for this option is in the Workshare Configuration Manager as follows:

Category	Parameter	Default
Protection > Sharing	Display Attach as Link button (Outlook)	Selected

When auto convert is not set up and your administrator has set a limit on attachment size (to avoid large files blocking Exchange), when you try and add a file with a size over the specified limit, Microsoft Outlook displays a message such as:
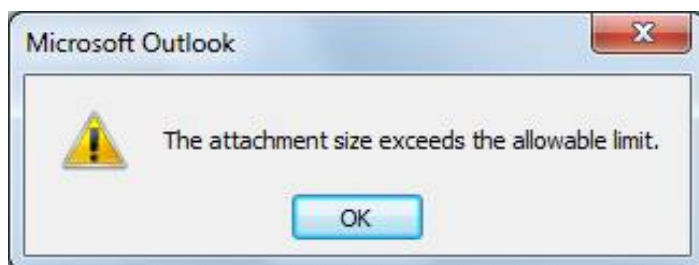
In this case, you can use the **Attach as Link** button to save the large file to a folder in Workshare and send recipients a link to the location.

The procedure will vary depending on the Protect user experience set up.

When Interactive Protect is configured:

1. Click **Attach as Link**.

2. Browse to the file you want to send.

3. Click **Open**. A link to the file appears in the body of your email.

4. Repeat steps 1 to 3 to add further files.

Once your email is sent, the files are uploaded to Workshare. The recipients will receive your email straightaway and they can click the file names or the **View the files** button to view the files in Workshare. If the files are still uploading, upload pending is displayed.

When the Protect Profile dialog is configured:

1. Click **Attach as Link**.

2. Browse to the large file you want to send and click **Open**.

3. Add the recipient and message details and click **Send**. The Protect Profile dialog is displayed with only the Secure File Transfer profiles available.

4. Select the required Secure File Transfer profile and click **Send**.

The large file is uploaded to a folder in your **Sent** folder (in **Folders**) in Workshare. The name of the folder is whatever is entered into the **Subject** field of the email. The recipient receives an email notifying them that file has been uploaded to Workshare online and providing a link to the file.

Auto select convert to link

The configuration required for this option is in the Workshare Configuration Manager as follows:

Category	Parameter	Default
Protection > Interactive Protect	Automatically select 'Convert to link' when total attachment size exceeds (MB)	No size specified

If a limit has been set for this parameter and you have Interactive Protect configured, when you attach a file over the specified limit, the **Replace all attachments with a link** checkbox in the **Convert to link** area is selected when the Interactive Panel displays. Simply click **Apply**, complete your email and click **Send** and your large file will be uploaded to a folder in your **Sent** folder (in **Folders**) in Workshare. The recipient receives an email notifying them that file has been uploaded to Workshare online and providing a link to the file.

Chapter 7:   Working Online

This chapter describes the file share & sync element of your installation, which brings the online secure file sharing, collaboration and storage features of Workshare to your desktop. It includes the following sections:

Overview

With file share & sync included in your installation, you can add your files to the secure Workshare online platform. Once there, you can access your files from anywhere and share them securely with people inside or outside your organization.

Workshare integrates with File Explorer so you can save and organize your files in local folders that function seamlessly on your hard drive, but automatically synchronize with Workshare online. Workshare also integrates with Office so you can share for review, for example, from right inside Word.

Workshare is available online through a browser at my.workshare.com. Content is divided into different areas to suit your needs:

Folders   Use Folders to publish files and make them available to others. Within Folders, use My Files to store your own private files that you don't want to share with anyone but you want easy access to from anywhere.

Groups   Use groups as workspaces where you can collaborate on files with people inside and outside your company.

Workshare integrates its save and share functionality into your familiar working environment:

- Using the Workshare sync folder on your desktop, you can save and share any files to all areas of Workshare online

- From open Office documents, you can save files to My Files in Workshare and share files into Workshare groups

- From your desktop, you can right click any file and share it to a group in Workshare

In order to access and use Workshare online, you must have a Workshare account.

Syncing Local Files

The Workshare sync folder is your local access point to the online services of Workshare. Both the Workshare sync folder and the synchronization functionality are provided by the Workshare desktop app.

What is the desktop app?

With file share & sync included in your installation, the Workshare desktop application (the desktop app) is installed. This is an application that syncs content between Workshare online and your PC so you can access your files and continue collaborating from your desktop while offline. The key features of the desktop app are as follows:

- Synchronization - Synchronizes groups, folders and files between Workshare and your desktop. You can be selective about what is synchronized to reduce the storage footprint on your local machine. If you can't work online, as soon as you're back online, the new versions are uploaded right away.

- Integration - Integrates Windows with Workshare online linking Workshare directly to everyday applications – users can save files directly into the Workshare sync folder from where they are copied into Workshare online.

Launching the desktop app for the first time

The desktop app is launched once the Professional installation is complete.
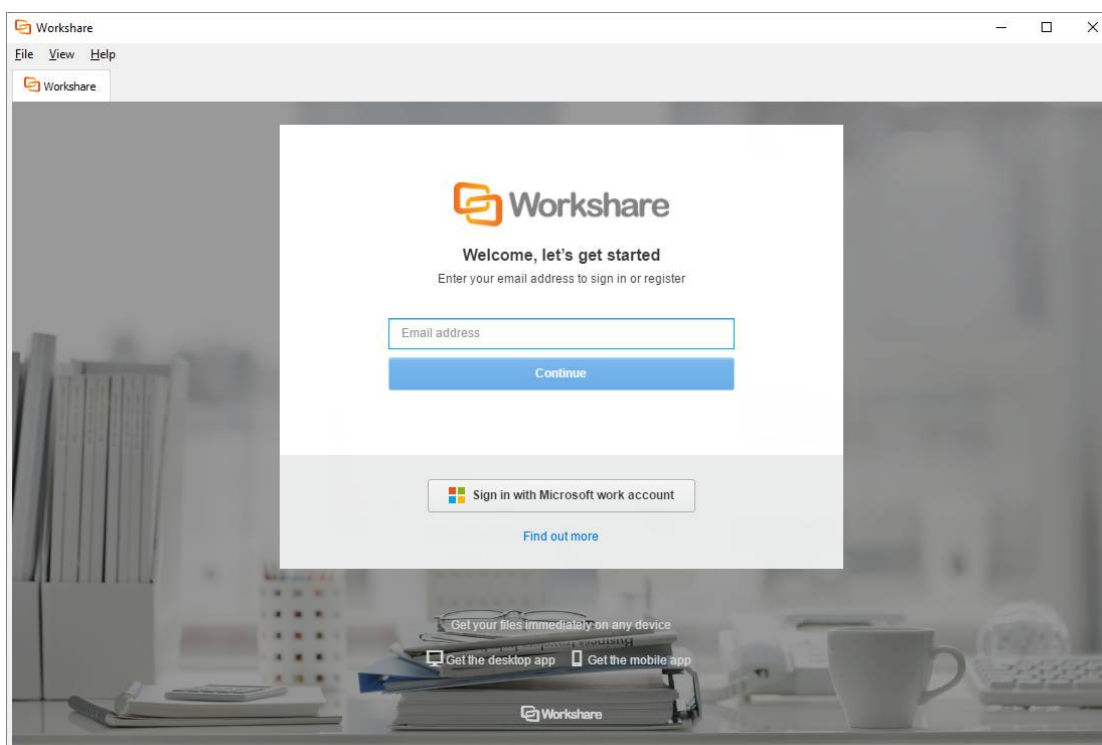
The installation of the desktop app places an icon in your Windows taskbar for basic management and it puts a folder in your Favorites/Quick access section in File Explorer, so you can quickly access and save your Workshare content. In order to access and use the desktop app, you must log in to it. You only need to perform this login once; afterwards the desktop app will launch automatically when Windows starts. You use your Workshare login credentials to log in to the desktop app.

To log in to the desktop app for the first time:

- When the desktop app launches after installation, enter the email address and password you used to sign up for Workshare and click **Sign In**.

> *Note: You can also display the login page by clicking the Workshare icon on your desktop or selecting **Workshare Desktop** from the Start menu.*

The Workshare desktop app looks very similar to Workshare online accessed from a browser.

In fact, from the desktop app, you can do all the things you can do when logging into Workshare online through a browser.

Once you have logged in:

- Your files and folders from your online Workshare account start to synchronize to your local Workshare sync folder
- The desktop app icon appears in your system tray

Workshare sync folder

The Workshare sync folder is your local access point to your online Workshare content. You can always find the latest copy of your Workshare files and you can add files to Workshare via the sync folder. It appears in your Favorites/Quick access section and its default location is C:\Users\[user name]\Workshare. You can change the location of the Workshare sync folder in Preferences > Sync Settings, described in *Configuring the Workshare Desktop App*.

You can also click **Open Workshare Folder** from the desktop app main window.

In your Workshare sync folder, you will see all your *synchronized* Workshare files and folders, grouped as follows:

- **Folders**: Shows all your Workshare files and folders, including files you have uploaded, as well as files others have shared with you. There are also three default folders:
  - **My Files**: Includes personal files that you don't want to share.
  - **Received**: Includes all the files sent to you by secure file transfer from Outlook.
  - **Sent Files**: Includes all the files you sent out to others by secure file transfer from Outlook.
- **Group Files**: Includes all your Workshare groups which are flexible workspaces ideal for projects that require dynamic conversations.

If you add, update or delete a file in your Workshare sync folder, it will be added, updated or deleted in Workshare online too. Similarly, if you add, update or delete a file in a synced folder in Workshare online through the web app on a browser, the changes will be seen in the Workshare sync folder.

The icon to the left of a file/folder indicates its sync status:

Waiting to be synchronized or synchronization is in progress

Synchronized

In this two-way file synchronization, updated files are copied in both directions, usually with the purpose of keeping the two locations identical to each other. You can control what is synced from your desktop just by adding or replacing files in your Workshare sync folder. Careful though, because anything you remove from your Workshare sync folder will also be removed from your Workshare online content.

Default sync

By default, the following files are synchronized:

- Files you add to My Files
- Files you add to a shared folder or a group that you own
- Files others add to a shared folder or a group that you own

You can select which folders to sync using the selective sync option. Refer to *Selective synchronization*.

System tray icon

The desktop app system tray icon shows the status of the desktop app as follows:

Icon	Status	Description
	Synced	The files in your local Workshare desktop folder are fully synced you're your online Workshare content.
	Sync in progress	The files in your local Workshare desktop folder are currently syncing with your online Workshare content.
	Pause	Synchronization between your local Workshare desktop folder and your online Workshare content is currently paused.
	Conflict	There is a conflict between files in your local Workshare desktop folder and files in your online Workshare content.
	Upgrade	An upgrade is available for the Workshare desktop app.
	Offline	The desktop app has been placed offline so no synchronization can occur.

Clicking the icon displays the following options:

Option	Description
Open Workshare App	Opens the Workshare desktop app window.
Open Workshare folder	Opens the Workshare sync folder.
Files up to date/conflicts	Indicates that all files are synchronized successfully or if there are sync conflicts between the desktop app and Workshare.
Pause	Pauses the current synchronization. The option becomes **Resume Syncing** when synchronization is paused.
Refresh	Refreshes the display and synchronizes with Workshare online.
Recycle Bin	Displays the Workshare recycle bin which includes all the Workshare files, folders and groups that have been deleted.
Selective Sync	Enables you to select which folders are synchronized between your desktop and Workshare online.
Preferences	Enables you to change application settings for the desktop app, such as the location of the sync folder or general account settings.
Help and support	Provides access to the Workshare knowledge base.
Quit Workshare	Stops the synchronization between your desktop and Workshare online.

Adding files to Workshare via the sync folder

You can add most file types to your local Workshare sync folder which will then be synchronized with your Workshare online account. You can add files to existing groups or folders or create new folders. You cannot create new groups from within the sync folder.

Note: Groups are created in Workshare from the web app or the desktop app.

You can simply copy/paste or save files into your local Workshare sync folder and they will be synchronized to Workshare online by default. However, if you have selected that specific folders do not synchronize then files added to those folders will not be synchronized. Refer to *Selective synchronization*.

To copy/paste to your local Workshare sync folder:

Drag the files or folders you want to add into your local Workshare sync folder.
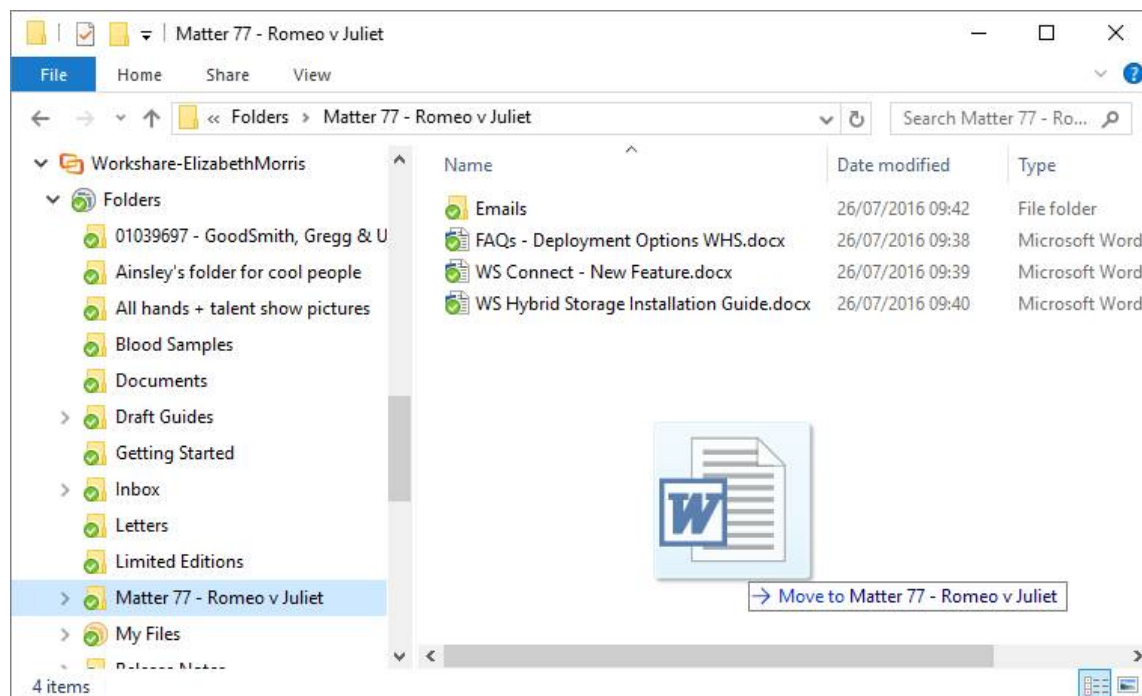
To save files to the Workshare sync folder:

1. Open a file – this can be any file, for example, a Word file, a PowerPoint presentation or an image file.

2. Click **Save As**.

3. Browse to your **Workshare** sync folder in Favorites/Quick access. By default this folder is located at Users\[user name]\Workshare.

4. Browse to a location in any of the three areas in Workshare and select an existing folder or create a new folder.

5. Click **Save**. Your file is now saved in your local Workshare sync folder and it is immediately synchronized to Workshare online (unless the selected folder is not set to synchronize).

Files won't sync from here…

- Files or folders added to the top level "Workshare" folder in your local sync folder will not be synchronized. Files and folders must be added into one of the two areas of Workshare – Folders or Group Files.

- New folders added to the Group Files area will not be synchronized – Groups can only be created via the web app.

In either of the above scenarios, the icon ![icon] next to the file and a popup message alert you that the file/folder cannot synchronize to Workshare.
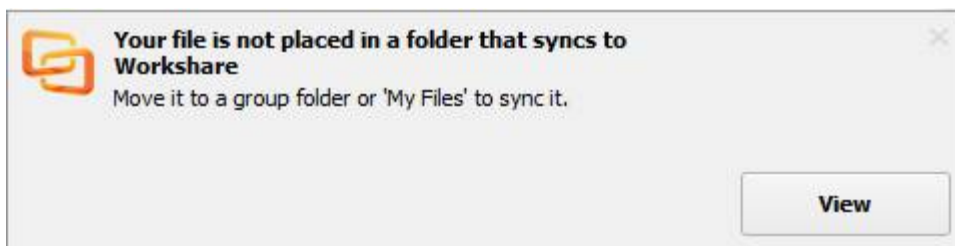
Clicking **View** opens the non-syncing folder locally so you address the problem.

Restoring deleted files

From the desktop app, you can access the Workshare online recycle bin where you can restore any of your accidentally deleted files, folders or groups. The recycle bin lists all your Workshare files and folders (those you own) that have been deleted – you may have deleted them using a web browser, from the desktop app or directly from the Workshare sync folder.

> *Note: When you have deleted files and folders from the desktop app or the Workshare sync folder, you will only see the deleted files and folders in the recycle bin after synchronization.*

The desktop app provides a window into the Workshare online recycle bin so if you are offline, you will not be able to access the recycle bin.

To access the recycle bin:

Click **Recycle Bin** in the left panel.
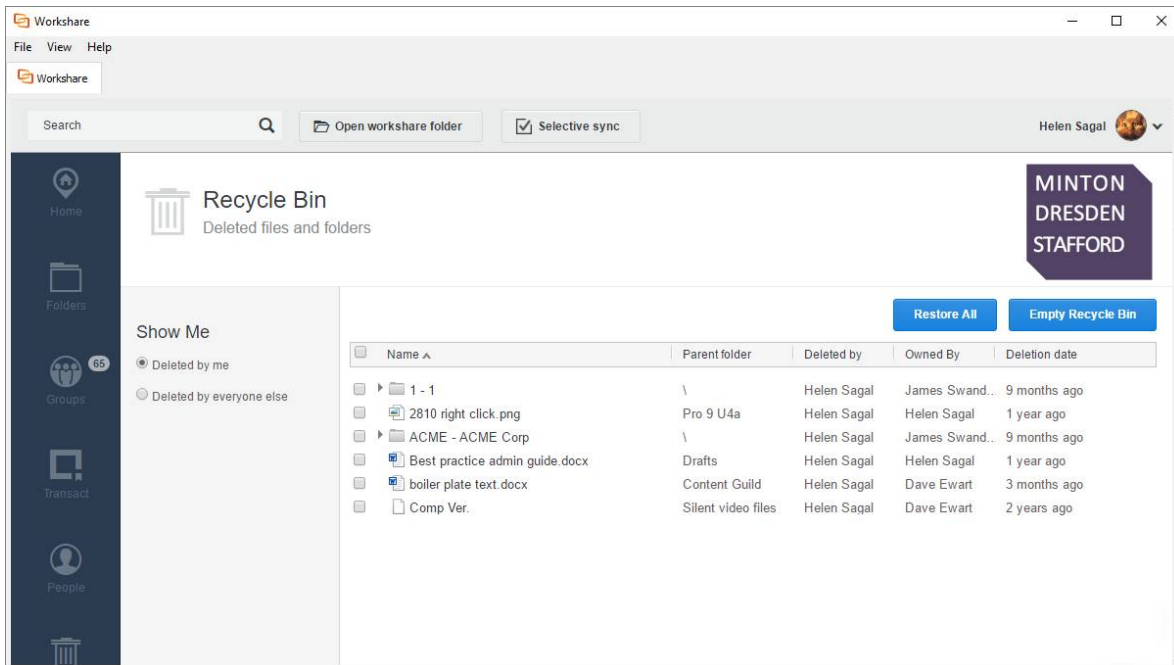
In the recycle bin you can see:

- Files, folders and groups owned by you that have been deleted by anyone; and
- Files, folders and groups owned by anyone that have been deleted by you.

You can filter the list to see what was deleted by you and what was deleted by others.

- Click **Restore All** to restore all files and folders in the recycle bin back to their original location.
- Click **Empty Recycle Bin** to permanently delete all files and folders in the recycle bin.

To restore selected files:

1. Click **Recycle Bin** in the left panel.

2. Select a file or a folder (or several files and folders). The buttons change to **Restore Selected** and **Empty Selected**.
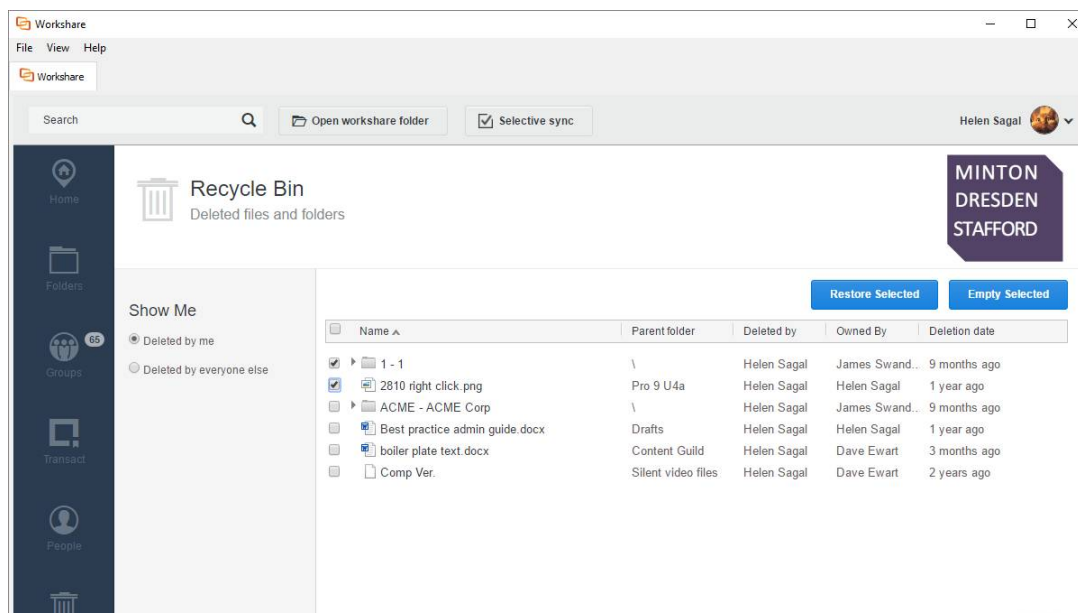
3. Click **Restore Selected** to restore the selected folders and files.

File synchronization

The desktop app synchronizes your online Workshare content to your local machine so you can access your files and continue collaborating when offline. By default, the following files are synchronized:

- Files you add to My Files

- Files you add to a shared folder or a group that you own

- Files others add to a shared folder or a group that you own

So if you add any of these files to Workshare via a web browser, they will be synced to your desktop and you will be able to access them from the Workshare desktop app (or sync folder). Synchronization works both ways so if you delete any of these files from the Workshare desktop app (or sync folder), they will be deleted from Workshare online and you will no longer be able to access them via a web browser.

Synchronization between Workshare online and your desktop occurs in the following situations:

- When logging into the desktop app

- When a new event occurs on Workshare online, such as a new file uploaded or a new version added

- When a new event occurs in the Workshare desktop app (or sync folder), such as a new folder created or a file added

- When the desktop app has been offline and then you go back online

- When clicking **Refresh** in the desktop app system tray menu

- When clicking **Update and Sync** in the Selective Sync page

You can pause synchronization at any time, for example, if you have a slow connection, and then restart it when convenient.

To pause synchronization:

Click the desktop app system tray icon and select **Pause**. Synchronization stops.

To restart synchronization, click the desktop app system tray icon and select **Resume**.

Selective synchronization

You can modify the default synchronization settings so that less files and folders are synchronized to your desktop in order to reduce the storage footprint on your local machine.

To select folders to synchronize:

1. Click **Selective Sync** in the desktop app main window (or from the desktop app system tray menu or the *File* menu). The selective sync page is displayed showing the root folders on Workshare – **Folders** and **Group Files**.

2. Click a folder to display its subfolders.

3. Select the folders that you want to synchronize between Workshare and your desktop by selecting the checkbox to the left of the folder/subfolder name. Selecting or deselecting a folder will automatically select/deselect the subfolders belonging to the folder. However, you can select a folder but then manually deselect some of its subfolders. Use the **Select All** checkbox to quickly select/deselect all folders.

> *Note*: By default when a folder or group is shared with you it is not selected for synchronization. To change this, select the **Automatically sync new folders shared with me** checkbox.

4. Click **Update and Sync**. All folders with a selected checkbox will be synchronized. The progress of the synchronization is shown in the sync progress page.
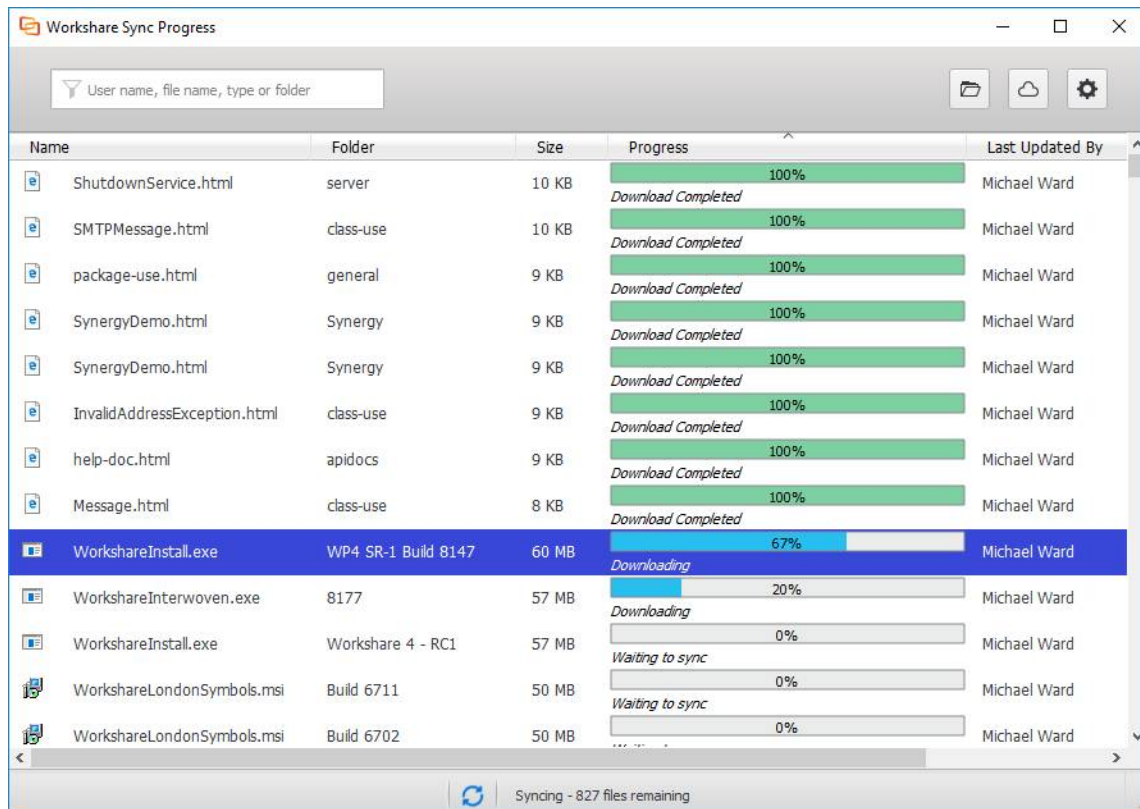
Folders that are not synchronized will not appear in your local Workshare sync folder.

Sync progress

The sync progress page shows the folders and files currently being synchronized.

To display the sync progress page:

When synchronization is in progress, select **Sync Progress** from the View menu.

The status bar provides a summary of the sync situation and the sync progress report provides a detailed view.

The files being synchronized are shown in a queue format. If you want to move a file in the queue, for example, you want to upload a small Word document and it is being held up by a large PowerPoint presentation, right-click the file you want to delay and select **Lower the sync priority**.

Synchronization conflict

The sync conflicts page provides a dedicated area where you can deal with file conflicts. Possible conflict scenarios include:

- You have opened a synced file locally and you are editing it. Meanwhile, in the web app, a new version is added to the file. When you save the open file, a conflict is shown.

- Two users are working offline and make changes to a file they share. User 1 goes back online and the revised file is synced to Workshare online as a new version. User 2 goes back online and a conflict is shown.

In your local Workshare sync folder, the file icon shows there is a conflict:
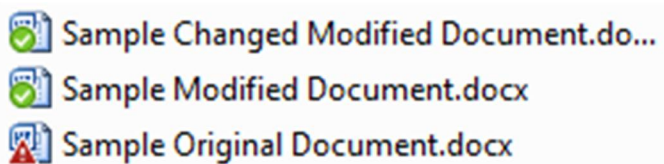
In addition, the desktop app system tray icon shows there is a conflict and the menu includes a **Conflicts** option:
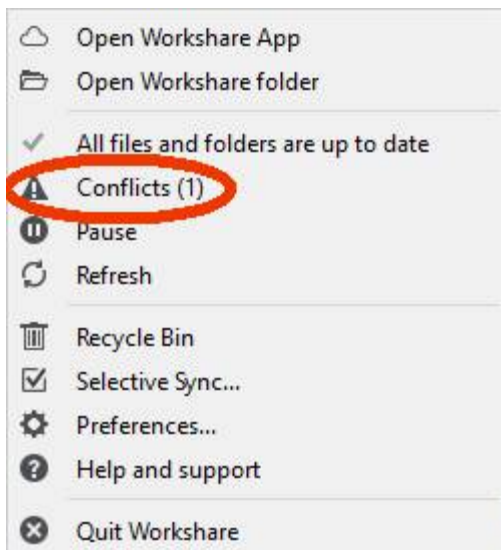
To resolve a conflict:

1. Click **Conflicts** in the desktop app main window (or from the desktop app system tray menu). The sync conflicts page is displayed listing the files with conflicts.

2. Expand a file in the sync conflicts page by clicking ⌄. The options for resolving the conflict are displayed. For example, you may want to add your file as the latest version or overwrite your version with the online version. You can always opt to keep both files involved in the conflict. Different options are displayed according to the particular conflict.
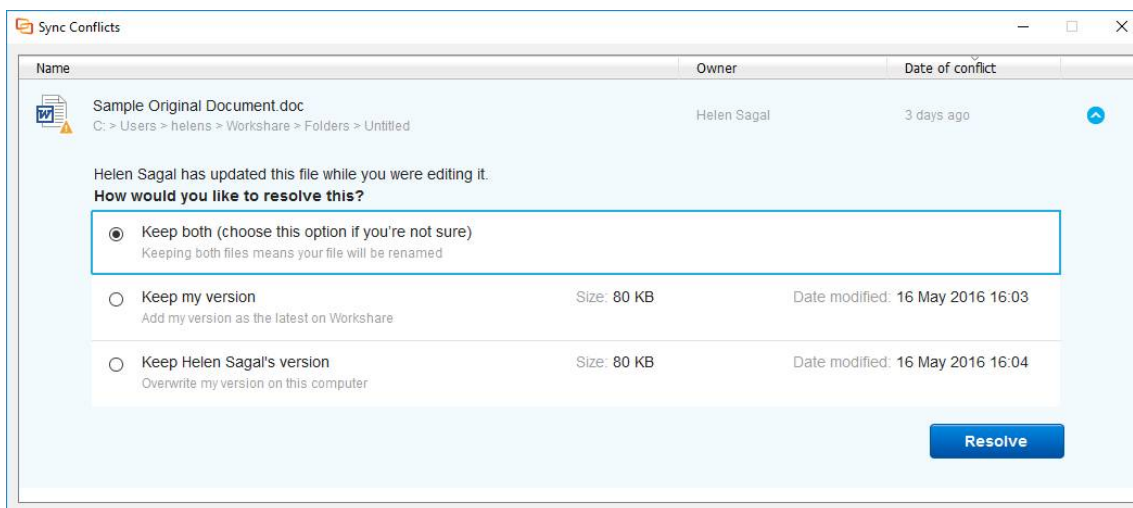
3. Select the option you want to apply and click **Resolve**.

Note: When there are no conflicts, the sync conflicts page is not available.

Collaborating in Workshare

Once you have shared folders with other users, those users will be able to access Workshare via the web app, view the files in the folder and add comments in real-time. If they have permission, they could also add new versions to a file. Any new versions will be synchronized to your desktop and you can also add versions to Workshare files from your desktop through your Workshare desktop app or your local Workshare sync folder. For example, simply open a file from your local Workshare sync folder, edit it and save it and it will be synced to Workshare online and appear as a new version.
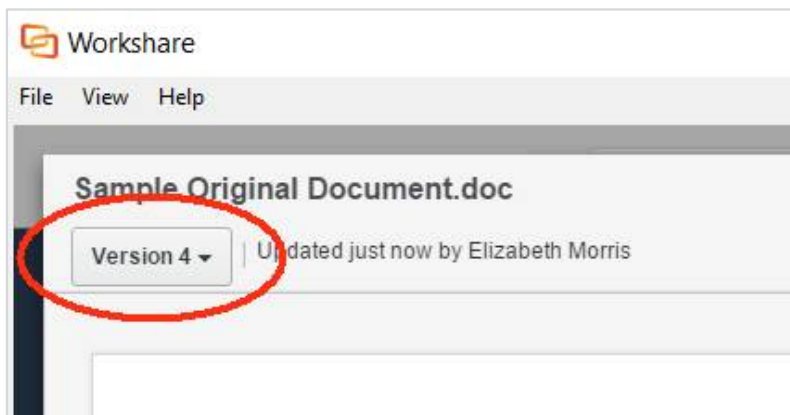
You can also open any file and save over a file in your local Workshare sync folder. It will be synced to Workshare online and appear as a new version.

Getting Content Online

As well as using your local Workshare sync folder to get your content online, you can use the right-click options and toolbar options added by the file share & sync element of your Professional installation.

Right-click sharing

The way to share files and folders from your desktop is to share them to a Workshare group.

Right-clicking any file on your desktop provides the option to share it to a group. The file or folder will be added to the group's files and all members of the group will be able to access it.

To share to a group:

1. In File Explorer, right-click any file or folder.
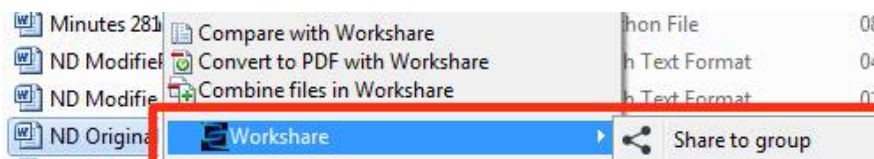
2. Select **Workshare**, then **Share to group**.
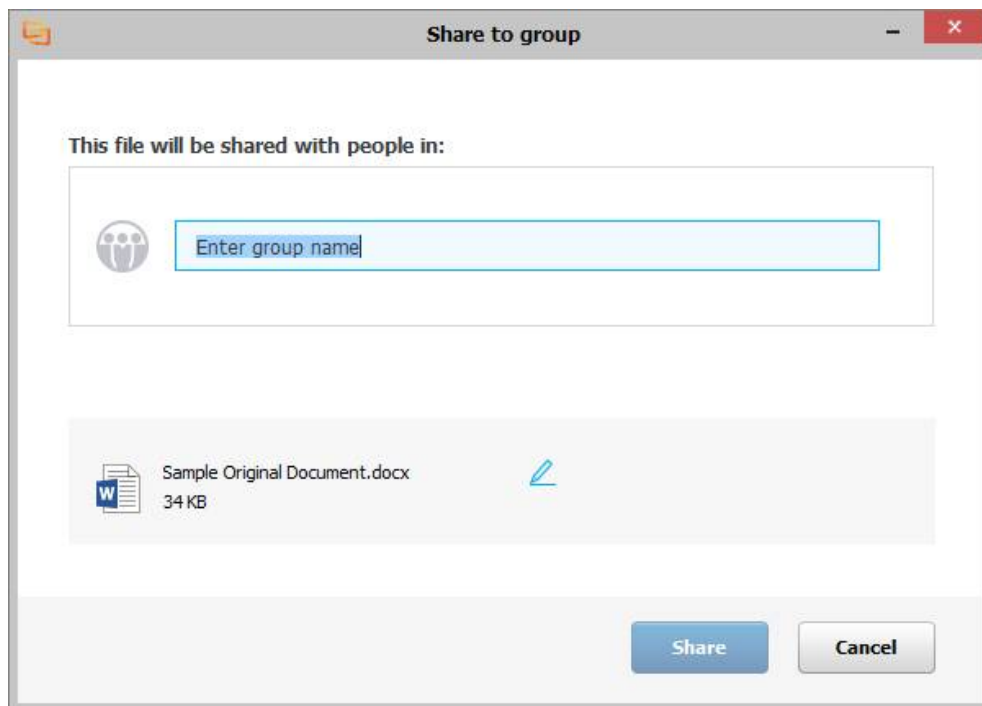
3. Enter the name of the group you want to share the file/folder with. When you click in the text box, a list of the most recent groups selected is displayed. As you start to enter a name, groups are suggested to you.
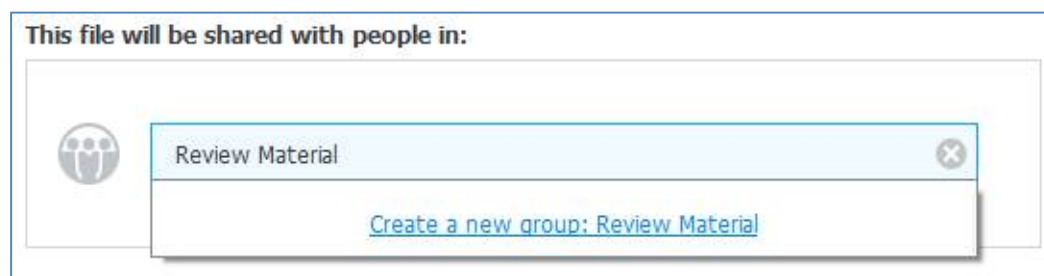
4. Select an existing group or enter a new group name and click **Create a new group**.

> *Note: Click **Change Group** to remove the specified group so you can select another one.*

5. If you want to change the name of the file/folder you are sharing, click and edit the name.

6. Click **Share**. The file/folder is uploaded to the specified group in Workshare online. If the group is synced, the added file or folder will also appear in the selected group in your local Workshare sync folder.

From open Office documents

Using Workshare toolbar options, you can save your Office files to Workshare online so they will be accessible to you online at all times. You can save them directly to a folder in My Files if they are private files that you don't want to share with anyone or you can save them directly to a group if you want to collaborate on them with people inside and outside your company.

You can save Word, Excel and PowerPoint files in their native format or convert them to PDF as you save.

> *Note: You can also save redlines to Workshare online from within Workshare Compare. Refer to* Saving redlines to Workshare online.

Additionally, you can display the Workshare Connect panel inside Office which provides a window into the document you have shared to a Workshare group.

Saving to My Files

The My Files area of Workshare online is where you can securely store your own private files that you don't want to share with anyone but you want easy access to from anywhere.

To save documents to My Files:

1. Open a file in Microsoft Word, Excel or PowerPoint.

2. In the Workshare tab, click **Save to My Files**. The *Save to My Files* dialog is displayed.
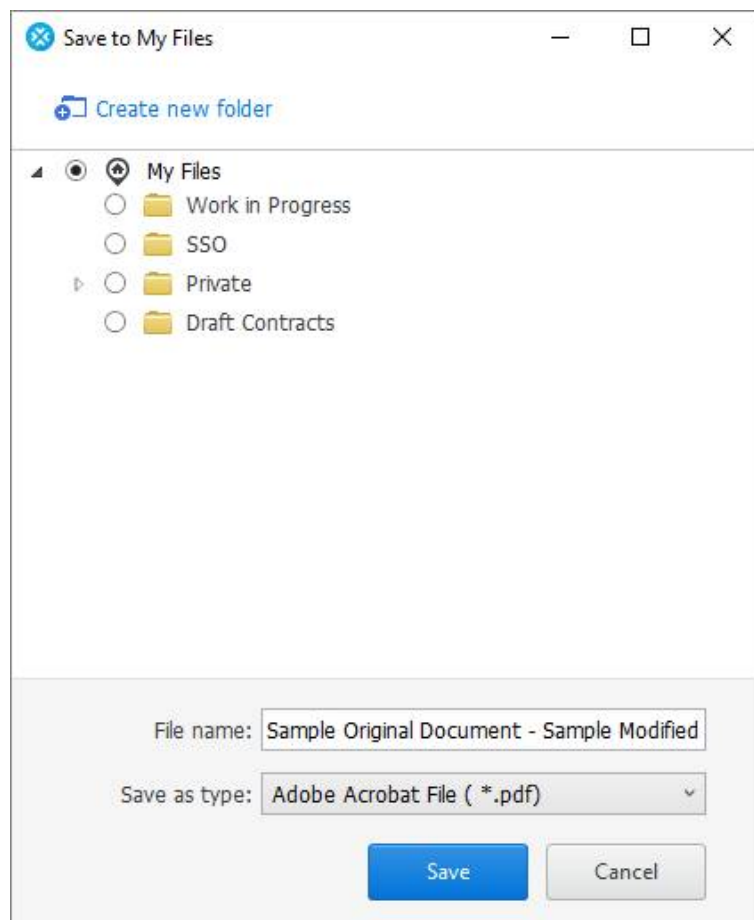
> *Tip!* *You can also display this dialog using Workshare options in the File menu.*

3. Browse through My Files and select the folder where you want to save the file.

> *Note: To create a new folder, click **Create new folder**, enter a name for the folder and click **Create**.*

4. In the **File name** field, modify the name of the file as required.

5. From the **Save as type** dropdown list, select the format for the saved file from the following:

   ▫ **Word Document/Excel Workbook/PowerPoint Presentation**: Saves the file in its native format

   ▫ **PDF**: Saves the file as a PDF file

   ▫ **PDF/A**: Saves the file as a PDF/A file

6. Click **Save**. The file is saved to the specified folder in Workshare My Files and you can log into Workshare and access the file from anywhere. The following notification pops up on your desktop:

> File saved to Workshare
> Copy link   View

You can click **View** to open the file in Workshare in your browser or click **Copy link** to copy the URL to the file to your clipboard. You can then paste this link to another location, for example, an email or an instant message.
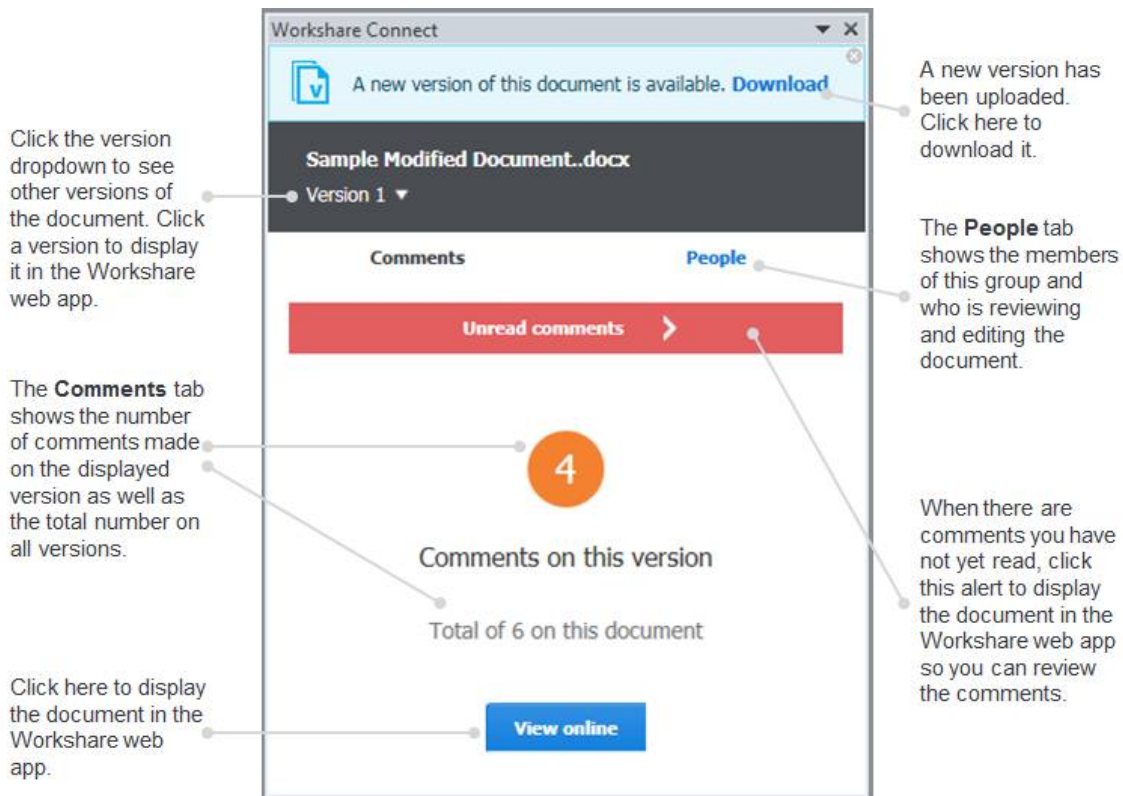
If the Workshare My Files folder is synced, the added file or folder will also appear in your local Workshare sync folder

Once you have saved a file to My Files, you can continue working and making changes as required. Clicking **Save to My Files** again will save the file to Workshare with the same name and in the same location as a new version. If you want to save the file to My Files as a new file with a different name, click the arrow on the **Save to My Files** button and click **Save as**.

Sharing to a Workshare group

By sharing files to Workshare groups, you save your file to a group in Workshare and all members of that group can access your file and collaborate on it with you.

To share documents to a group:

1. Open a file in Microsoft Word, Excel or PowerPoint.

2. In the Workshare tab, click **Share**. The *Share* dialog is displayed.

> Share   ×
>
> A copy of your file will be shared to:
>
> [group icon]   Enter group name   ✓ ⊗
>
> [Word icon] WS Professional 9 UG ✎   Version 1
>   5.2 MB
>
>   Share   Cancel
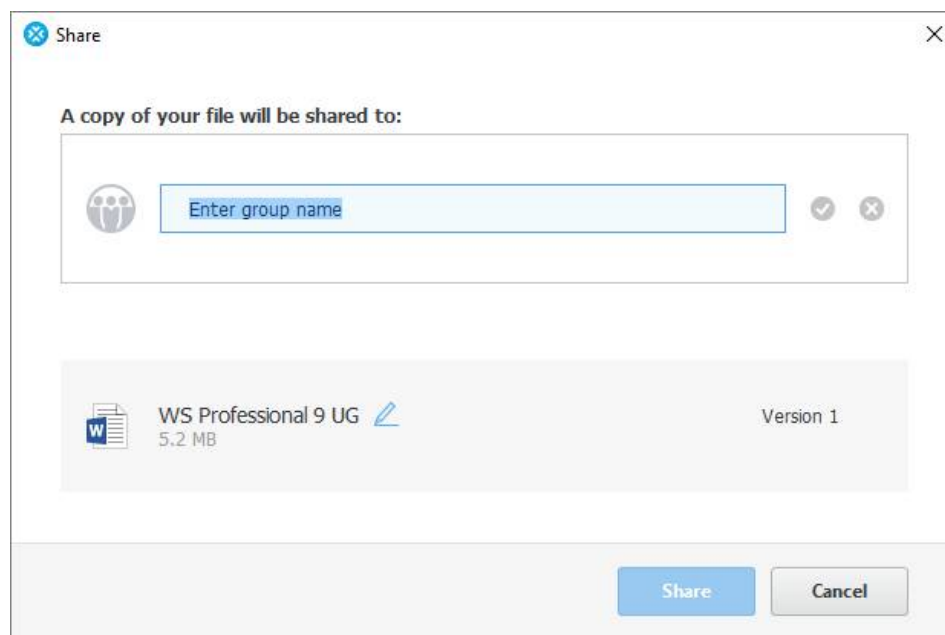
> *Tip!* *You can also display this dialog using Workshare options in the File menu.*

3. Enter the name of the group you want to share the file with. As you start to enter the name, groups are suggested to you.
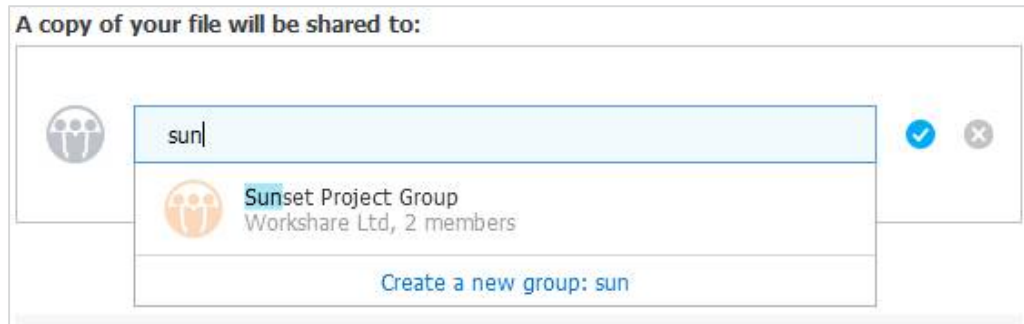
4. Select a group or enter a new group name and click **Create a new group**.

5. Edit the name of the document by clicking ✎, modifying the name and then clicking ✔.

6. Click **Share**. The document is saved to the group in Workshare and a confirmation dialog is displayed.
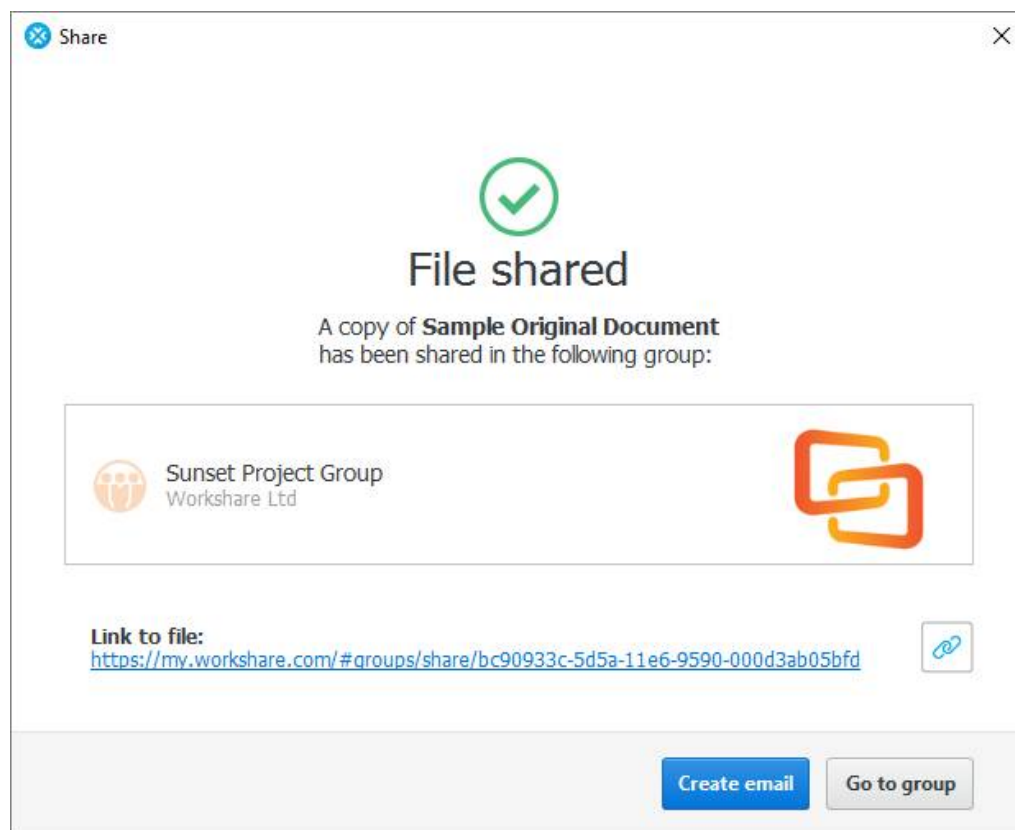
If the Workshare group is synced, the added file or folder will also appear in your local Workshare sync folder

7. Continue in one of the following ways:

   ▫ Click **Create email** to open a new email in Outlook that includes a link to the document in Workshare. You can invite people to the group by sending the email to them.

   ▫ Click **Go to group** to open the group in Workshare in your browser where you can see the document, set group permissions and select members.

> *Note: Click [icon] to copy the link to the document to your clipboard. You can then paste this link to another location, for example, an email or an instant message.*

Monitoring shared files

The Workshare Connect panel inside Office provides a window into the files you have shared to Workshare groups.

When you have shared a document into a group in Workshare and you open the document locally, the Workshare Connect panel provides a view of what is happening with your collaboration. You can see the other reviewers (the members of the group) and whether they are online at the moment. You can also see how many comments have been made on the document and whether any new versions have been added to it. With a single click you can open the document in Workshare online via a browser and join in the collaboration by viewing comments and making your own comments.

If you open a shared document in Office and the Workshare Connect panel is not displayed, click **Toggle Panel** in the Workshare tab to display it. When the document is not shared to a Workshare group, the panel will look something like this:
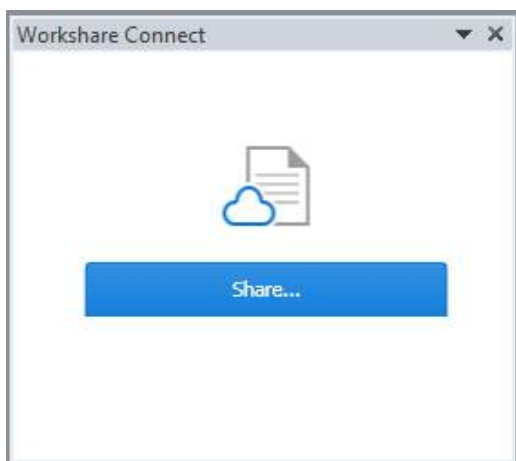
Once your document is shared, the Workshare Connect panel will provide real-time information about the collaboration, like new comments and versions.

Click the version dropdown to see other versions of the document. Click a version to display it in the Workshare web app.

The **Comments** tab shows the number of comments made on the displayed version as well as the total number on all versions.

Click here to display the document in the Workshare web app.

A new version has been uploaded. Click here to download it.

The **People** tab shows the members of this group and who is reviewing and editing the document.

When there are comments you have not yet read, click this alert to display the document in the Workshare web app so you can review the comments.

Workshare Connect

A new version of this document is available. **Download**

Sample Modified Document..docx
Version 1 ▼

Comments   People

Unread comments   >

4

Comments on this version

Total of 6 on this document

View online

New versions

When another group member adds a new version of the document, you are notified in the Workshare Connect panel. Click **Download** and the new version is downloaded and opened. Now the Workshare Connect panel will ask if you'd like to see what's different between this new version and the previous version. With a single click, both versions are compared in Workshare Compare.

Workshare Connect

This document has been updated since you last opened it. **See changes**

Sample Original Document.docx
Version 1 ▼

Comments   People
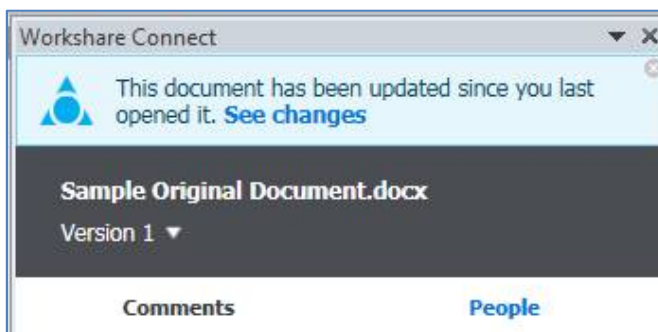
Comments added

In the **Comments** tab, you can see the number of comments made on the version of the file you are looking at (in orange) as well as the total number of comments on all versions of the file. If you want to see the actual comment, click **View online** and open the file in Workshare via a browser so you can view comments and update versions and add comments if you want. When comments are made that you have not yet seen, click the **Unread comments** alert and the file is opened in Workshare via a browser.

Group members

In the People tab, you can see all members of the group that have access to your document. A green light indicates the member is currently viewing the file. The following three lists are available:

- **Everyone**: All members who have access to the file
- **Reviewers**: Any member who has looked at the file
- **Editor**: A member who has looked at the file in Word (and had Workshare installed and the Connect panel turned on)

Chapter 8: Advanced PDF Functionality

This chapter describes how to convert a PDF file to a Microsoft Word file as well as combine several documents into a single PDF. It includes the following sections:

- **Converting PDF Files to Word Format**, page 206, describes how to convert a PDF document into Microsoft Word format.

- **PDF Combine**, page 207, describes how to combine multiple files into a single PDF.

Converting PDF Files to Word Format

> **Note***: This functionality is not available when Workshare Compare is installed in Office 2013 environments (and above); they have this functionality built-in.*

Workshare Compare provides accurate conversion of PDF files to Microsoft Word files (PDF to DOC/DOCX format) preserving document formatting and page layout. This functionality is available from within Microsoft Word and by right-clicking closed PDF files on your desktop.

Converting a PDF document into Word format is useful if you want to edit the document, as PDF documents cannot be edited as easily as Word documents.

> ***Notes:***
> *Workshare cannot convert secure PDFs, meaning PDF files with security settings configured.*
>
> *Scanned PDF files will not be converted to editable text – the content remains as an image and cannot be edited.*

To convert a PDF:

1. To convert a PDF document to DOC format:
   - Right-click the closed PDF file and select **Open in Word with Workshare**.
   - From Microsoft Word, click **Open**. Browse to the PDF file and click **Open**.

The *Open PDF in Word* dialog is displayed.
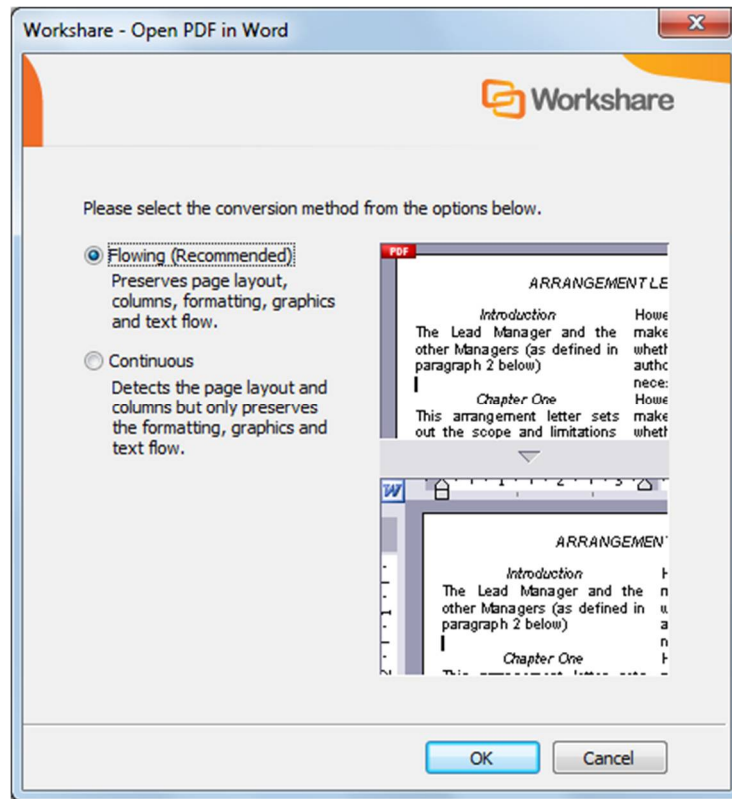
2. Select a conversion method according to how much of the formatting and layout you want to preserve and click **OK**. The PDF document is converted to Word format and is opened in Microsoft Word.

You must save the document.

> **Notes:**
> *The name in the title bar will still include the PDF extension. However, the document is in DOC/DOCX format.*
>
> *When converting a PDF file to Word format, the display may vary according to the type of PDF. The type of PDF means the software used to create the PDF file. For example, Adobe, Amyuni, CutePDF, novaPDF, and so on.*

PDF Combine

Workshare Protect enables you to combine multiple files into a single PDF or PDF/A file. For example, electronic court submissions are required to be submitted as a PDF or PDF/A file. Case information can include multiple file formats such as contracts, financial spreadsheets and email conversations. You can combine a range of file types including Word, Excel, PowerPoint, PDF, RTF, TXT, HTML, MSG and other formats.

To combine multiple documents into a single PDF:
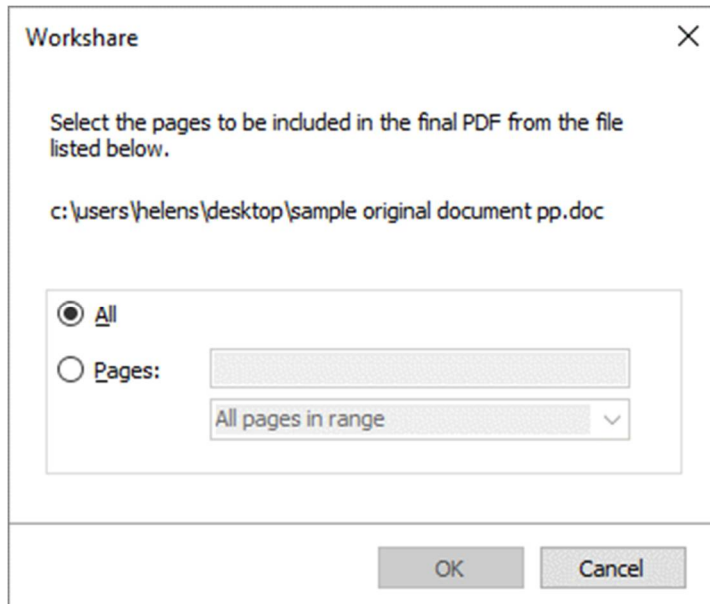
1. In an open Office document, click **Combine PDF** (**Protect** group) in the Workshare tab or in File Explorer or your DMS, right-click one or more files that you want to combine into a single PDF and select **Combine files in Workshare**. (You do not have to select all the files to combine at this stage but can add them later.) The *Combine Files* dialog is displayed.
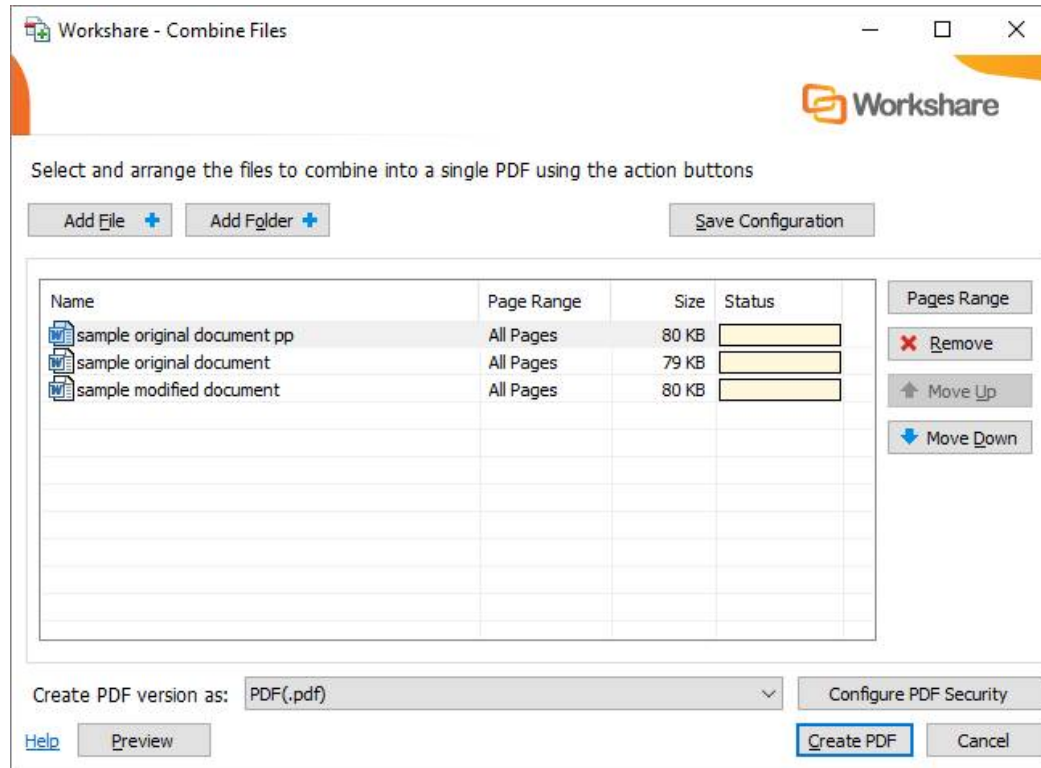
2. Add the additional files you want to include in the single PDF using the buttons at the top or by dragging and dropping. Click **Add Files** to select and add a single file and click **Add Folder** to add multiple files from a selected folder.

3. Once you have selected the files to combine, arrange the order using the **Move Up** and **Move Down** buttons. If you want to remove a file from the list, select it and click **Remove**.

4. If you only want to include selected pages from a particular document, select the file in the list and click **Pages Range**.

5. Select the **Pages** radio button and specify the pages to be included into the combined PDF as required.

6. Click **OK**.

7. Select whether you want to create a PDF file or a PDF/A file from the **Create PDF version as** dropdown list.

8. If you want to set security options for the combined PDF, click **Configure PDF Security**.

9. Select one or more of the following security options:
   - **Prevent printing:** Prevents recipients from printing the PDF document.
   - **Prevent editing of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
   - **Prevent the copying of text and/or graphics:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prevent comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.

Note: These options are disabled and cannot be selected if you selected PDF/A in step 7.

10. To specify what hidden data to remove before converting it to PDF, select the **Clean before PDF** checkbox and click **Cleaning Options**.
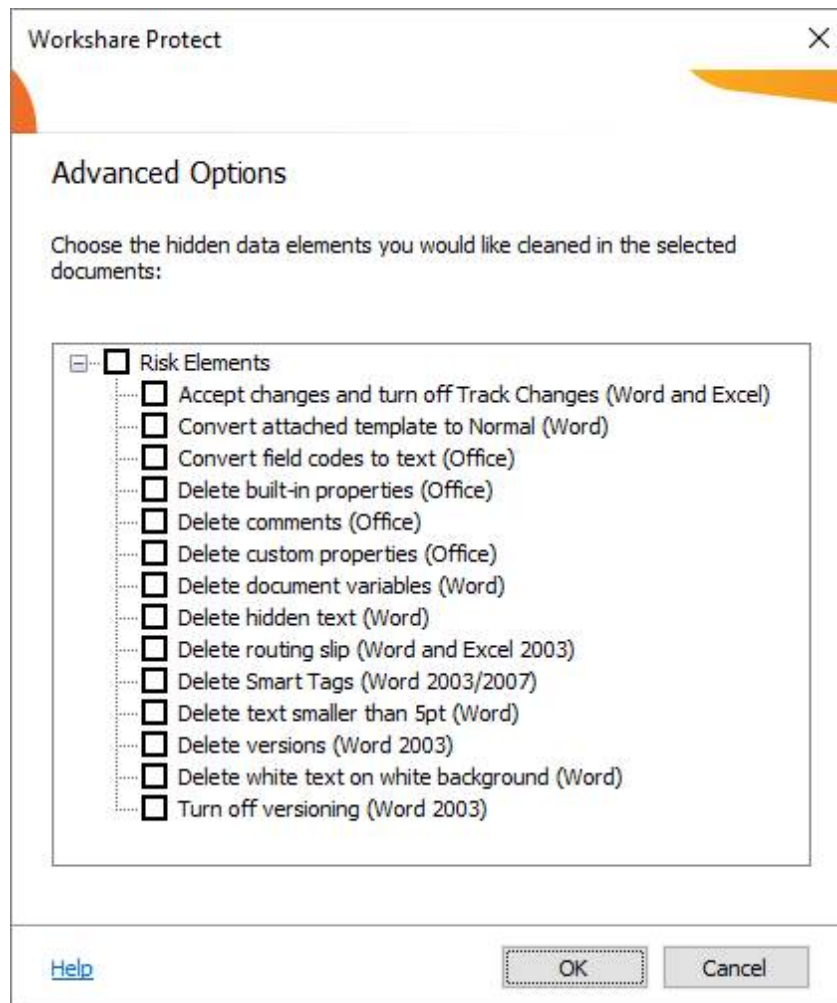
11. Select hidden data elements as required. For a full description of all the hidden data elements, refer to Cleaning Hidden Data for further information.

12. Click **OK**.

13. If required, set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, the recipient can only open the PDF after entering this password.

> *Note: If you selected PDF/A in step 7, you cannot set a password and the **Password protection** area is disabled.*

14. Click **Apply**.

15. If required, click **Preview** to view the combined PDF.

16. Click **Create PDF**. A *Save as* dialog is displayed.

17. Specify the name and location for the combined PDF file and click **Save**. The documents are converted into a single PDF. The progress of the operation can be seen in the **Status** column in the *Combine files* dialog.

If you want to save your selection without creating a PDF – for example, if you have not completed the selection of documents – you can save your work in progress as a Workshare workbook (.WWB) by clicking **Save** in the *Combine Files* dialog. When you are ready to work on it again, simply right-click the WWB file and select **Combine files in Workshare** or drag new files you want to include over the WWB file. This re-opens the *Combine Files* dialog and you can continue.

> *Note*: For iManage users, in order to save a Workshare workbook, the WWB file type needs to be registered as a file type on the Worksite Server.

> *Note*: If you work with Workshare online, you can also use Save As and save the combined PDF to your Workshare sync folder and it will be synchronized to Workshare. Refer to Adding files to Workshare.

Chapter 9:   Configuring Workshare

This chapter describes the Workshare Configuration Manager. It includes the following sections:

- **Introducing the Workshare Configuration Manager**, page 214, introduces the Workshare configuration utility.

- **Accessing the Workshare Configuration Manager**, page 214, describes how to access the Workshare Configuration Manager.

- **Setting Parameters**, page 216, describes how to set values for parameters in the Workshare Configuration Manager.

Introducing the Workshare Configuration Manager

The Workshare Configuration Manager is a 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 collection of policies. A policy is a set of parameters applied by Workshare Protect when determining content risk.

Administrator Mode and User Mode

The Workshare Configuration Manager has two modes as follows:

- **Administrator Mode**: This mode is for administrators to make changes to the default settings on the local machine. Settings made are saved in HKEY_LOCAL_MACHINE in the Registry. As a user you will only have access to Administrator mode if you have Administrator rights.

- **User Mode**: This mode is for 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.

Note: Your system administrator may have restricted the rights of users to modify configuration parameters by locking individual parameters so that users cannot override the setting. If you have restricted access rights and have special requirements for configuration, please speak to your system administrator.

Accessing the Workshare Configuration Manager

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

To access the Workshare Configuration Manager:

In an open document, click **Options** in the *Workshare* tab or from the Start menu, select **Workshare Configuration (User Mode)**. The Workshare Configuration Manager opens in User Mode.

The configuration parameters for Workshare are grouped into categories and sub-categories. Click a sub-category to display its parameters. The different sub-categories and their parameters are described in a separate guide - *Workshare Configuration Options*.

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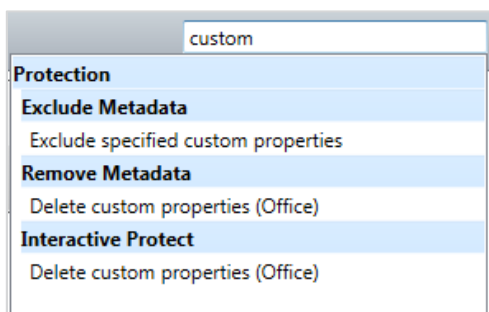
Click the parameter in the results list and the relevant category and sub-category are displayed in the Workshare Configuration Manager.

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, selecting an option from a dropdown list or entering a value in a text box.

The 🔵 icon to the right of a parameter indicates that the parameter value has been changed.

> *Note: When parameters have been locked by your administrator, the parameter will be disabled and a lock symbol will appear to the left of the parameter. You cannot change locked parameters.*

3. Continue to select categories and sub-categories and specify parameters as required.

4. Click **Apply** to save your settings. A confirmation message is displayed once the settings have been saved.
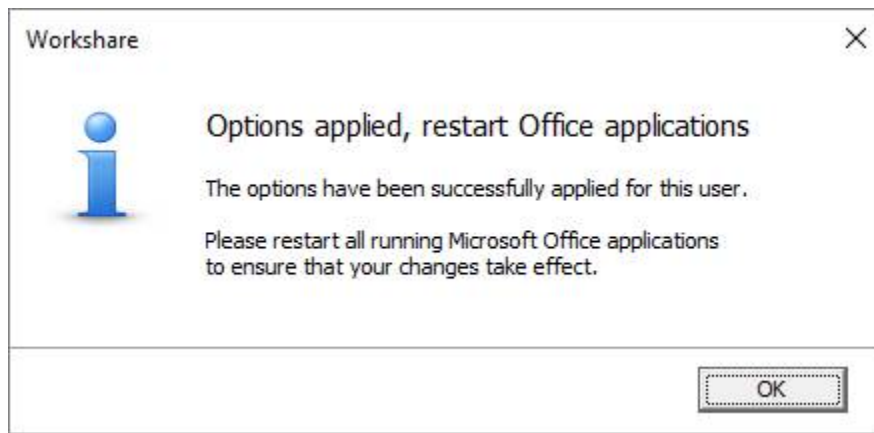
5. Click **OK** and restart all Microsoft Office applications.

Note: The different sub-categories and their parameters are described in the Workshare Configuration Options *guide.*

Appendix A. Configuring Rendering Sets

This appendix describes how to configure rendering sets for Workshare Compare and apply them to a comparison. It includes the following sections:

- **Introducing Rendering Sets**, page 219, introduces Workshare rendering sets and describes how they determine the look of a redline.

- **Accessing the Rendering Sets Manager**, page 220, describes how to access the Workshare Rendering Sets Manager.

- **Customizing Rendering Sets**, page 223, describes how to create your own rendering sets as well as modify and delete existing rendering sets.

- **Rendering Set Parameters**, page 224, provides a detailed description of all the parameters included in rendering sets.

For a description of how to configure rendering sets when comparing Excel files, refer to *Rendering Sets in Compare for Excel*.

Introducing Rendering Sets

Workshare Compare uses colors and different formats in the redline to enable you to see the changes that have been made to the documents.

For example, the following indications can be used:

- Deletions in ~~red with a strikethrough~~
- Insertions in <u>bright blue with a double underline</u>
- Moved or cut text in ~~green with a strikethrough~~
- Pasted (copied) text in <u>green with a double underline</u>
- Moved deletions in salmon pink with a strikethrough

The colors and formats adopted depend on the rendering set applied to the comparison. Workshare Compare includes several different rendering sets that you can apply as required or you can modify these rendering sets or create your own rendering set.

Note: It is general practice that your system administrator will have been involved in creating a set of standard rendering sets for your company to use and may have restricted the rights of users to create, delete or modify their own rendering sets. If you have restricted access rights and have special requirements for rendering sets, please speak to your system administrator.

Where are rendering sets stored?

By default, rendering sets are stored in the following locations:

- The default rendering sets included with Compare are machine-wide rendering sets and are stored in a shared documents folder at the following location: C: Users > Public > Public Documents > Workshare > Rendering.

- Any further rendering sets created by users are personal rendering sets and are stored in C: Users > (user name) > My Documents > Workshare > Rendering. This can be changed by an administrator in the **Default location rendering set** parameter in the Workshare Configuration Manager (**Comparison** > **Administration** category).

You can store rendering sets at other locations but you must specify the location (or locations) in the **Additional locations for rendering sets** parameter in the Workshare Configuration Manager (**Comparison** > **Administration** category). Workshare Compare looks in the two default locations (specified above) to create a list of the possible rendering sets available and will also look in any additional locations specified in this parameter.

Applying rendering sets

You apply a rendering set to a comparison before the comparison is run and you can also apply a rendering set at any time after a comparison has been performed.

To apply a rendering set after the comparison has been run:

- Refer to *Applying a different rendering set*
- Refer to *Changing the comparison options*

Accessing the Rendering Sets Manager

The Rendering Sets Manager is accessible from the Workshare Configuration Manager, from Workshare Compare and from the Workshare tab in Microsoft Office.

From the Workshare Configuration Manager

Access the Workshare Configuration Manager and select the Rendering Set Manager tab.
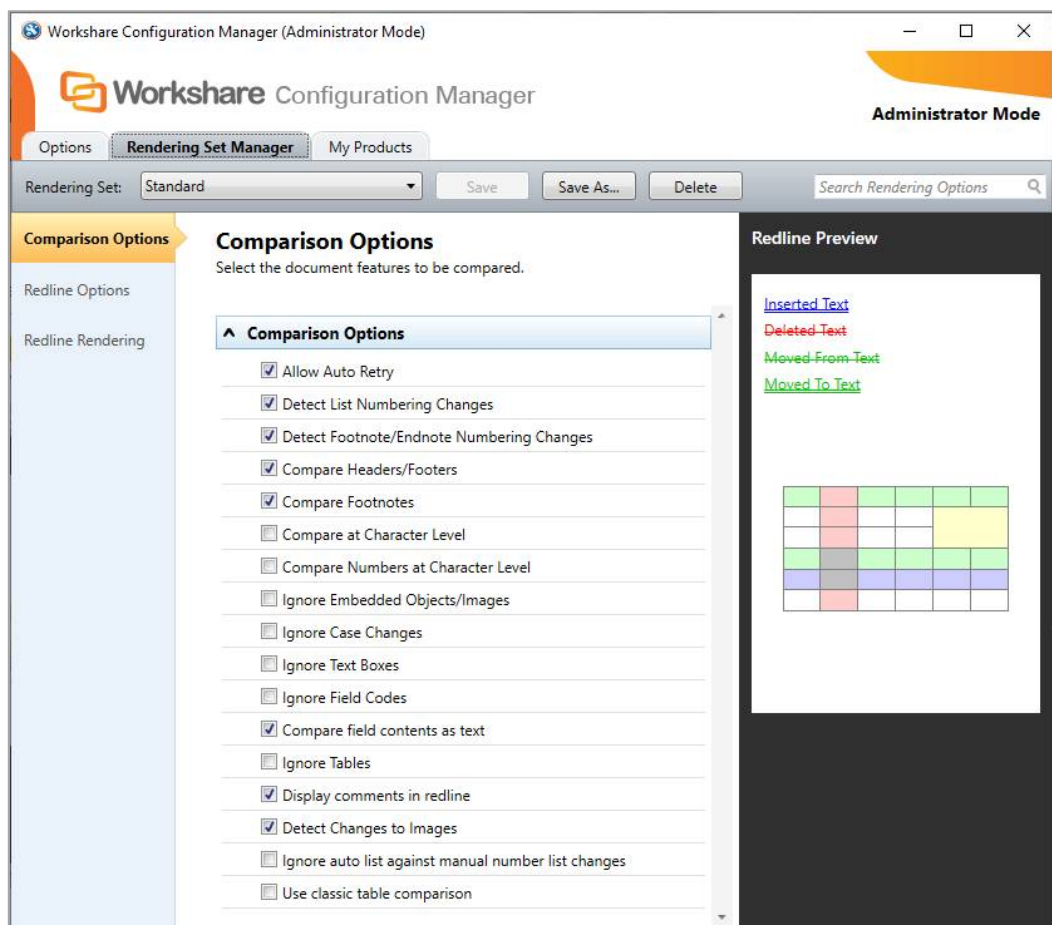
If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to *Customizing Rendering Sets*.

Before running a comparison

Before running a comparison, click [icon] in the *Compare Documents* dialog.
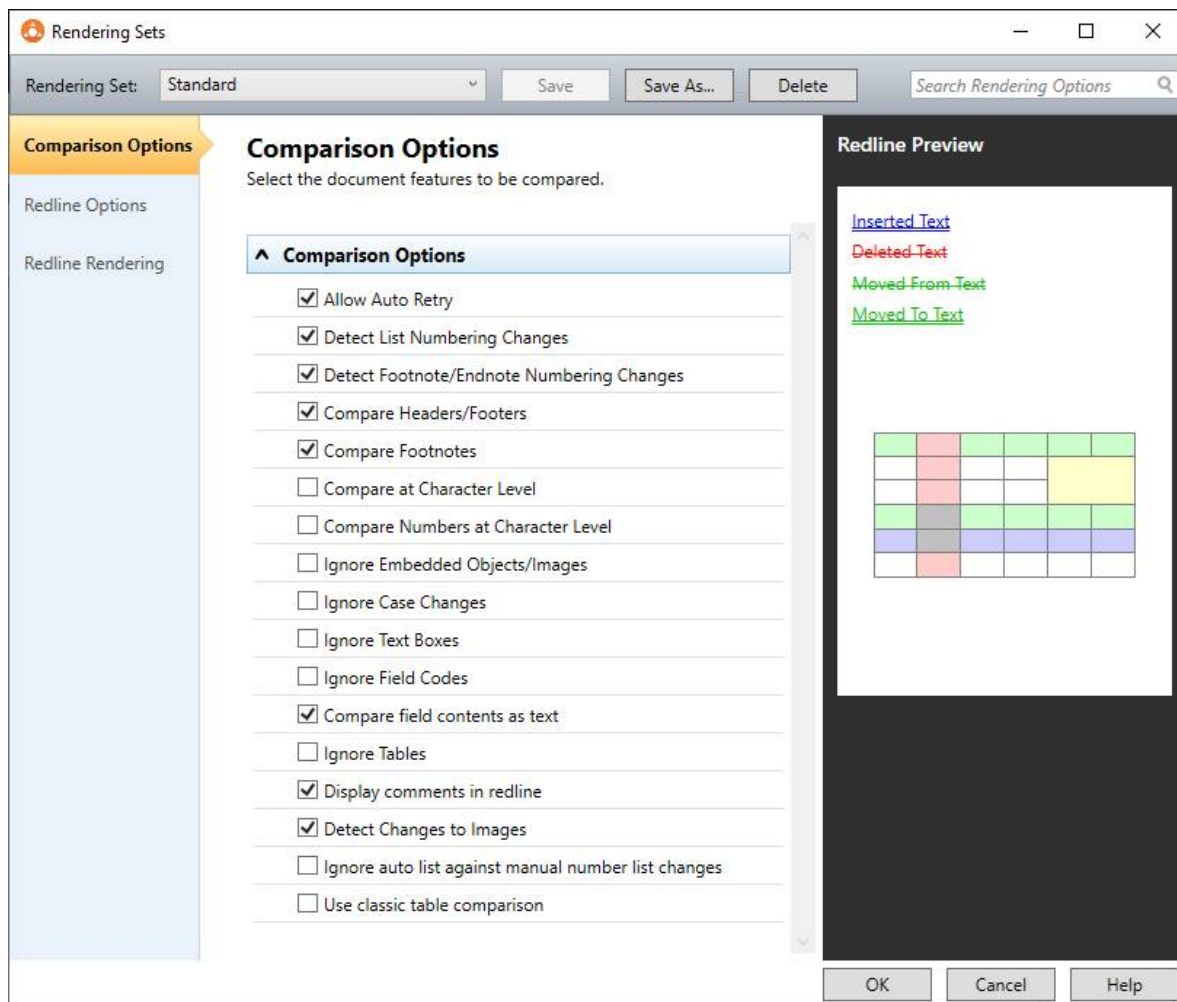
If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to *Customizing Rendering Sets*.

Additionally, you can edit the rendering set parameters as required and click **OK**. The *Save Rendering Set* dialog is displayed where you can either:

- Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, ", /, \\ or |. Click **Yes**. The updated rendering set is saved and it is selected in the *Compare Documents* dialog.

- Click **No**. The revised options are saved as a temporary rendering set called "Custom rendering set" and this rendering set is selected in the *Compare Documents* dialog.

After running a comparison

In the Workshare Compare main window, click **Edit** in the Home ribbon (**Comparison Themes** group).
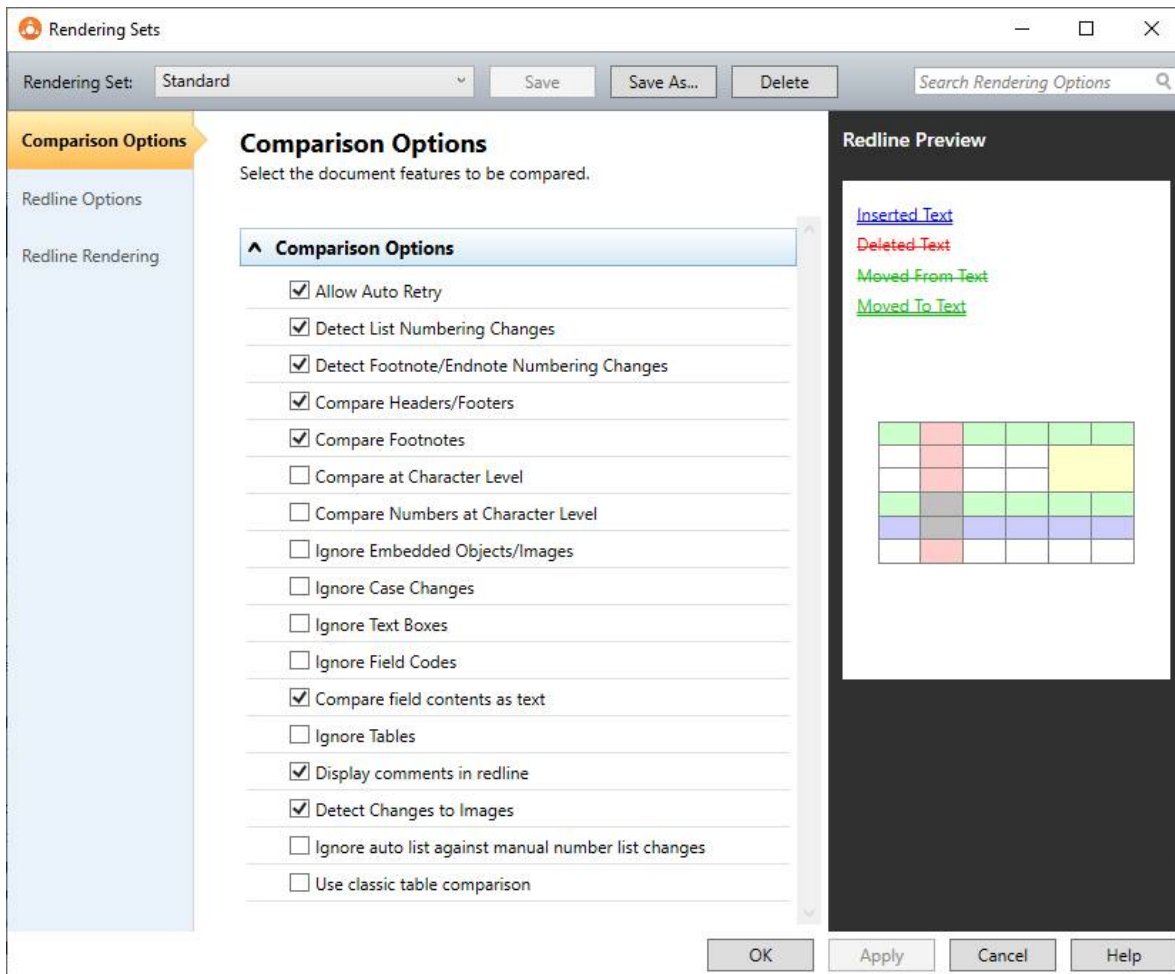
If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to *Customizing Rendering Sets*.

Additionally, you can re-run a comparison changing specific comparison options. Refer to *Changing the comparison options*.

Customizing Rendering Sets

If you have the relevant access rights, you can modify and delete existing rendering sets as well as create new rendering sets.

Note: Depending on how Workshare Compare has been distributed through the company, you may or may not have access rights to configure rendering sets. If you have any questions about your access rights, please speak to your system administrator.

Modifying existing rendering sets

If you have permission, you can modify the settings of an existing rendering set.

To modify an existing rendering set:

1. In the Rendering Sets Manager, select the rendering set you want to modify from the **Rendering Set** dropdown list.

Standard ▾
Standard no color
Standard no moves
Standard with caret for deletes
Standard with change numbers
Standard with classic table comparison
Standard with font changes
Standard with shading
Standard
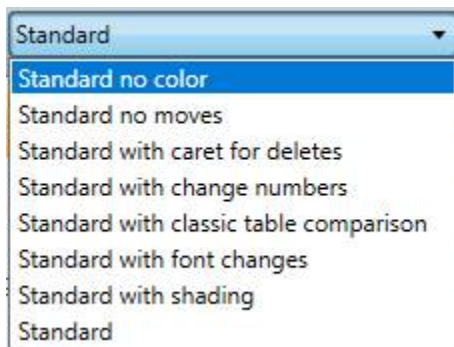
2. Configure or modify the parameters for the rendering set as follows:
    - ▫ Click a category in the left pane to display parameters for that category in the right pane.
    - ▫ Configure the parameters as required.

    Categories and their parameters are described in *Rendering Set Parameters*.

3. Click **Save**. The modified settings are saved to the selected rendering set.

Creating new rendering sets

If you have permission, you can create a new rendering set. You create a new rendering set based on an existing rendering set and then modify it as required.

To create a new rendering set:

1. In the Rendering Sets Manager, select the rendering set on which you want to base your new rendering set from the **Rendering Set** dropdown list.

2. Click **Save As**. The *Save Rendering Set* dialog is displayed:
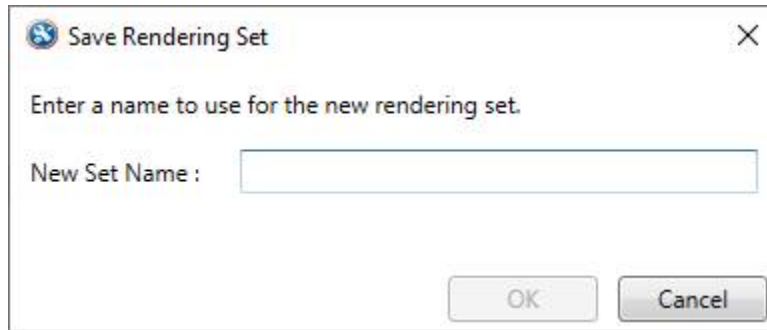
3. Enter a name for the rendering set. Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, ", /, \\ or |.

4. Click **OK**. The new rendering set is selected in the **Rendering Set** dropdown list.

5. Configure or modify the parameters for the rendering set as follows:
   - Click a category in the left pane to display parameters for that category in the right pane.
   - Configure the parameters as required.

   Categories and their parameters are described in *Rendering Set Parameters*.

6. Click **Save**. The settings are saved to your new rendering set.

Deleting rendering sets

If you have permission, you can delete rendering sets from the Rendering Sets Manager.

To delete a rendering set:

1. In the Rendering Sets Manager, select the rendering set that you want to delete from the **Rendering Set** dropdown list.

2. Click **Delete**. The selected rendering set is deleted.

Rendering Set Parameters

The parameters for rendering sets are grouped into the following categories:

- Comparison Options
- Redline Options
- Redline Rendering

The categories appear in the left pane of the Rendering Sets Manager. Selecting a category displays the parameters for that category in the central pane. The right hand pane show a preview of how the redline will look with the parameters selected.

Comparison Options

The **Comparison Options** category includes parameters that enable you to customize how the compare is performed.

The Comparison Options parameters are described in the following table:

Parameter	Description
Allow Auto Retry	When selected, if a comparison fails for any reason then Workshare Compare automatically attempts to perform a comparison using reduced settings. Workshare Compare methodically and automatically disables the Comparison Options selected until it is able to perform a comparison.
Detect List Numbering Changes	If selected, changes to automatically generated list numbers for numbered paragraphs are detected.
Detect Footnote/Endnote Numbering Changes	If selected, changes to the numbering of footnotes and endnotes are detected. You may want to deselect this parameter yet keep the **Compare Footnotes** parameter selected. This way, changes to the content of footnotes and endnotes will be detected but not changes to the numbering.
Compare Headers/Footers	If selected, the headers and footers in the original and modified documents are compared.
Compare Footnotes	If selected, the footnotes in the original and modified documents are compared.
Compare at Character Level	If selected, words that are only slightly different from each other are compared. For example, if **banana** has been changed to **bananas** - Workshare Compare shows just an insertion of an **s** in the redline, rather than showing a deletion of **banana** and an insertion of **bananas**. This is intended to catch simple typing mistakes.
Compare Numbers at Character Level	As above description, but compares numbers instead of characters.
Ignore Embedded Objects/Images	If selected, embedded objects and images are ignored while doing the comparison and will not be displayed in the redline.
	If not selected, the embedded objects and images will appear in the redline (although changes to them are not detected unless the **Detect changes to Images** parameter is selected.)
	This option is useful when documents have very large images embedded in them which would produce vast amounts of data if written to the redline RTF file and would slow down the comparison process and the loading of the redline.
Ignore Case Changes	If selected, any case changes (for example, upper case to lower case) are not compared and the content of the modified document is shown in the redline document.
Ignore Text Boxes	If selected, any text boxes are not compared and the content of the modified document is shown in the redline document.

Parameter	Description
Ignore Field Codes	If selected, any field codes are not compared and the content of the modified document is shown in the redline document. If not selected, field codes are compared and where they have changed, the entire original field is shown as deleted and the entire modified field is shown as inserted.
Compare field contents as text	If selected, converts certain field codes to text and then compares. If not selected, compares field code only. Fields converted to text will not be subject to the **Ignore Field Codes** parameter if that is also selected. *Note: The following field codes are converted to text: TOC, REF, TOA, TA, DATE, TIME, COMMENTS, KEYWORDS, AUTHOR, FILENAME, SAVEDATE, CREATEDATE, PAGEREF, INDEX, DOCPROPERTY, TITLE, MERGEFIELD, NOTEREF, SHAPE, QUOTE. Other field codes will be dealt with according to the **Ignore Field Codes** parameter setting.* For example, where there is a date field that in the original document shows 1 Jan 2012 and in the modified updates to 31 Jan 2012. When this parameter is selected, the redline will show 131 Jan 2012. Where this parameter is not selected, no change will be shown.
Ignore Tables	If selected, any tables are not compared and the content of the modified document is shown in the redline document.
Display comments in redline	If selected, comments in the original and modified documents are compared.
Detect Changes to Images	If selected, images in the original and modified documents are compared. In order for images to be compared, you must ensure that the **Ignore Embedded Objects/Images** parameter is NOT selected.
Ignore auto list against manual number list changes	If selected, when an automatically formatted list is being compared against a manual list, any changes in the manual list are ignored. Generally this parameter should NOT be selected. It should only be selected in circumstances when one of the documents being compared contains automatic list numbering and the other document contains manual list numbering.

Parameter	Description
Use classic table comparison	If selected, tables are compared as they were in releases prior to Workshare Professional 10.1 Revision 1. The Workshare Professional 10.1 Revision 1 release introduced an updated method of table comparison that creates more readable results in the vast majority of cases.

Redline Options

The **Redline Options** category includes parameters that enable you to customize how the redline is displayed and what information is included with the redline.

The Redline Options parameters are described in the following table:

Parameter	Description
General Options	
Include redline statistics	If selected, statistics about the changes between the original and modified documents are displayed in the redline. You can select to display these statistics **at the start of the document** or **at the end of the document**.
Include Redline Comparison Summary	If selected, a summary of all the changes is displayed at the end of the redline. The changes are hyperlinked to take you directly to the change in the redline.
Include Redline Option Summary	If selected, a summary of the options selected in the current rendering set is displayed at the end of the redline in the statistics report.
Display Workshare Compare Footers	If selected, details about the two documents being compared are displayed in the footer of the redline.
Black And White Headers	If selected, changes detected in the header are rendered in black and white. The color scheme set up in the rendering set is maintained for changes to all other parts of the document.
Black And White Footers	If selected, changes detected in the footer are rendered in black and white. The color scheme set up in the rendering set is maintained for changes to all other parts of the document.
Show Moved Deletions	If selected, text that was deleted from a section of the document and then subsequently moved to a new location is indicated.
Show Changes to Spaces	If selected, any extra spaces that have been added to or deleted from the modified document are indicated.
Show Paragraph Changes	If selected, paragraph markers (¶) of any extra paragraphs that have been added to or deleted from the modified document are displayed.
Include file names in Redline statistics	If selected, the names of the compared documents are included in the redline statistics.
Change Indicator Options	
Show Hidden Text	If selected, hidden text is displayed in the redline.
Show Line Numbering	If selected, the line number is displayed to the left of each line in the margin of the redline.
Show Change Numbering ToolTips	If selected, tool tips are displayed when you position the cursor over change numbers.

Parameter	Description
Show change bars	If selected, vertical lines to indicate a change are displayed next to each change in the margin of the redline. You can select to display the lines either in the **Left** or **Right** margin.
Show change numbers	If selected, the change number is displayed next to each change in the margin of the redline. You can select to display the number either in the **Left** or **Right** margin.
Readability	See the *Readability* section below.

Note: The change indicator settings do not show if you open the redline in Microsoft Word.

Readability

The **Readability** option enables you to set at what point insertions and deletions should no longer be marked individually but marked as an entire paragraph deleted followed by an entire paragraph inserted. The deleted paragraph is as the paragraph appears in the original document and the inserted paragraph is as the paragraph appears in the modified document.

For example, the following paragraph showing numerous deletions and insertions is quite difficult to read:

DeltaView **redline with Table of Contents:** (Vendor)When performing a redline where the document contains an**contents issue:** An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is *.wdf. **Workaround:** Save the redlineWord. Workaround: Save the table of contents in as a new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolutionDOC file and open it in Word before printing.

It would be much easier to read this paragraph if it was presented as the entire paragraph deleted followed by a new paragraph inserted, as follows:

DeltaView redline with Table of Contents: (Vendor)When performing a redline where the document contains an automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is *.wdf. **Workaround:** Save the redline as a new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolution.

DeltaView Table of contents issue: An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated in Word. Workaround: Save the table of contents in as a DOC file and open it in Word before printing.

Obviously, if there were only a few deletions and insertions in a paragraph, then the first example is easy to read.

With the Readability parameter, you can specify at what point Workshare Compare no longer marks deletions and insertions individually but marks the entire paragraph as a deletion followed by the new paragraph as an insertion. You specify this by setting a readability percentage by dragging the **Paragraph Matched Text Threshold** slider to your required setting. The percentage selected is shown in a tool tip below the slider.
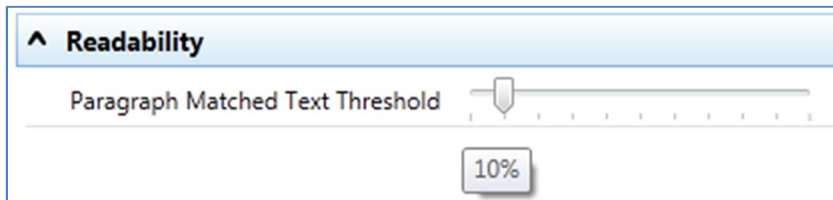
The meaning of the setting is as follows:

- With readability set at 10%, Workshare Compare will mark insertions and deletions individually unless 90% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the first example shown previously. Only when more than 90% of the paragraph has changed will Workshare Compare display the paragraph as the second example.

- With readability set at 50%, Workshare Compare will mark insertions and deletions individually unless 50% of the paragraph has changed. In other words, paragraphs will be displayed in the same way as the first example shown previously unless more than 50% of the paragraph has changed.

- With readability set at 90%, Workshare Compare will mark insertions and deletions individually unless 10% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the second example shown previously. Only when less than 10% of the paragraph has changed will Workshare Compare display the paragraph as the first example.

The default setting for readability is 10%.

Workshare Compare looks at each paragraph separately and assesses its readability according to the number of changes in the paragraph.

Note: When working with tables, Workshare Compare does not treat the entire table as a paragraph. Each paragraph within each cell is treated separately.

Readability only applies to paragraphs that contain both inserted and deleted text because such paragraphs may be unclear whereas paragraphs with only insertions or deletions do not have such readability problems.

Redline Rendering

The **Redline Rendering** category includes parameters that enable you to customize how specific types of changes are displayed in the redline.

The Redline Options parameters are presented in the following sections:

Inserted Text

The **Inserted Text** section includes parameters that enable you to customize how you would like inserted text to appear in the redline.

The Inserted Text parameters are described in the following table:

Parameter	Description
Inserted Text Color	The color of inserted text.
Inserted Text Background	The color of the background of inserted text.
Inserted Text Format	The format of inserted text. Select from <u>Underline</u>, <u>Double Underline</u>, *Italic* or ~~Strikethrough~~.
Surrounding Characters	A keyboard character to go before and after inserted text.

Deleted Text

The **Deleted Text** section includes parameters that enable you to customize how you would like deleted text to appear in the redline.

The Deleted Text Format parameters are described in the following table:

Parameter	Description
Deleted Text Color	The color of deleted text.
Deleted Text Background	The color of the background of deleted text.
Deleted Text Format	The format of deleted text. Select from <u>Underline</u>, <u>Double Underline</u>, *Italic* or ~~Strikethrough~~.
Surrounding Characters	A keyboard character to go before and after deleted text.

Parameter	Description
Deleted Text Replacement Character	The character used to replace deleted text. If the **Replace Deleted Text with a Single Character** checkbox is selected, the deleted text is replaced with a single instance of the character specified. If the **Replace Deleted Text with a Single Character** checkbox is not selected, each character in the deleted text is replaced with the character specified. For example, if the word **compare** is deleted and the character specified is **X**, the word appears as **XXXXXXX**.
Replace Deleted Text with a Single Character	If selected, deleted text is replaced with a single character. If you select this checkbox, enter the required character in the **Deleted Text Replacement Character** field. For example, if the word **compare** is deleted and the character specified is **X**, the word appears as **X**.
Include summary of deletions	If selected, a summary of deletions is included with the redline.

Moved Text

The **Moved Text** section includes parameters that enable you to customize how you would like moved text to appear in the redline.

The Moved Text parameters are described in the following table:

Parameter	Description
Show Movements	If selected, moved text is shown in the redline. If you leave this checkbox unchecked, then any text that has been moved is displayed the same as inserted and deleted text. ***Note**: Text is only shown as moved if it's over 22 characters. Anything less will be shown as insertions and deletions. This is to prevent showing moved text incorrectly. For example, if someone had deleted the word "and" from one paragraph and added "and" in another, they probably have not moved the text, rather they are just changing the individual paragraphs, so would want them displayed as insertions and deletions.*
Moved Text Color	The color of moved text.
Moved Text Background	The color of the background of moved text.
Moved Source Text Format	The format of the source moved text. Select the format of the text in its original position from Underline, Double Underline, *Italic* or ~~Strikethrough~~.
Moved Destination Text Format	The format of the destination moved text. Select the format of the text in its new position from Underline, Double Underline, *Italic* or ~~Strikethrough~~.
Move Source Surrounding Characters	A keyboard character to go before and after source moved text. Specify the characters to surround the text in its original position.
Move Destination Surrounding Characters	A keyboard character to go before and after destination moved text. Specify the characters to surround the text in its new position.

Change Numbering

The **Change Numbering** section includes parameters that enable you to select whether change numbers are shown in the redline and, if so, how they appear.
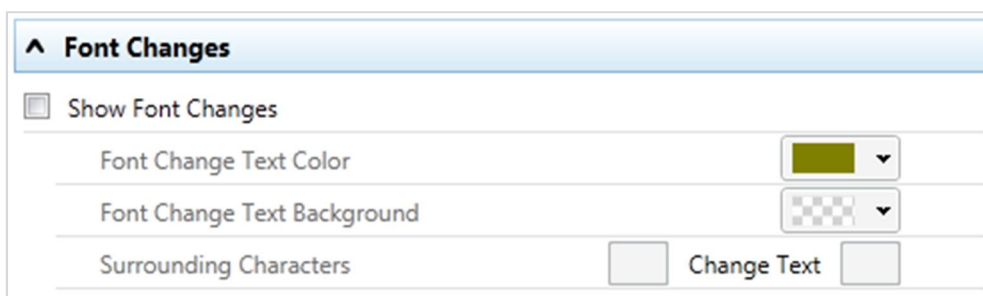
The Change Numbering parameters are described in the following table:

Parameter	Description
Show Change Numbering	If selected, the number of the change is displayed next to each change in the body of the redline (as superscript).
Show Change Numbering before Change	If selected, the change number is displayed before the change. If not selected, the change number is displayed after the change. It is recommended to position the change number before the change as footnotes often appear after text. This reduces confusion.
Change Number Text Color	The color of change numbers.
Change Number Text Format	The format of change numbers. Select from a range of formats, including **Superscript** or **Bold**.

Font Changes

The **Font Changes** section includes parameters that enable you to customize how you would like any font changes to appear in the redline.

The Font Changes parameters are described in the following table:

Parameter	Description
Show Font Changes	If selected, font changes are shown in the redline.

Parameter	Description
Font Change Text Color	The color of font changes.
Font Change Text Background	The color of the background of font changes.
Surrounding Characters	A keyboard character to go before and after font changes.

> *Note: Insertions and deletions override any font changes. For example, if the modified document has new inserted text in a different font, it appears as inserted text and not as font change text.*

Style Changed Text

The **Style Changed Text** section includes parameters that enable you to customize how you would like any style changes to appear in the redline.

The Style Changed Text parameters are described in the following table:
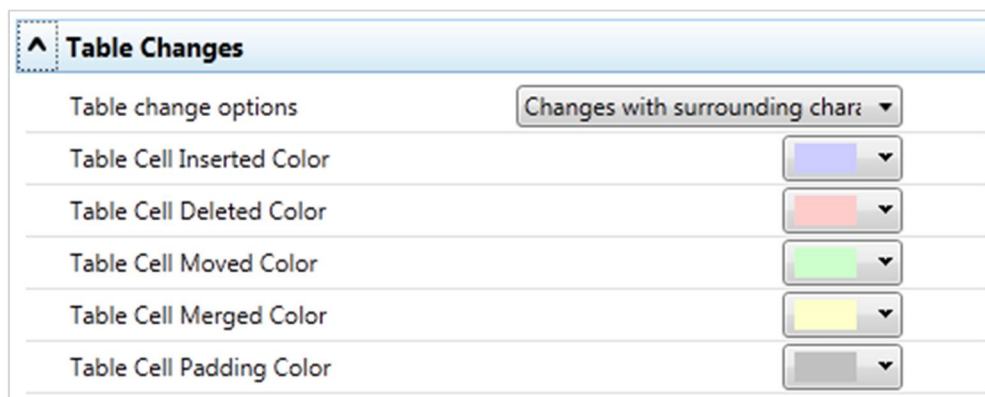
Parameter	Description
Show Paragraph Style Changes	If selected, paragraph style changes are shown in the redline. Paragraph style changes are indicated in words, for example, **normal to heading two**.
Style Changed Label Color	The color of text in paragraphs where the paragraph style has changed.
Show Character Style Changes	If selected, character style changes are shown in the redline.
Style Changed Color	The color of character style changes.

Parameter	Description
Style Changed Background	The color of the background of character style changes.
Style Changed Format	The format of character style changes. Select from <u>Underline</u>, <u>Double Underline</u>, *Italic* or ~~Strikethrough~~.
Surrounding Characters	A keyboard character to go before and after style changed text.

> **Note:** *Changes to heading styles are also shown in the statistics report at the end of the redline.*

Table Changes

The **Table Changes** section includes parameters that enable you to customize how you would like any format changes in tables to appear in the redline.

The Table Changes parameters are described in the following table:

Parameter	Description
Table Change Options	The way changes in tables are indicated. You can select from the following: **Changes with surrounding characters**, **Changes without surrounding characters**, **Whole original and modified tables**, **Whole modified table only** or **Whole modified table only (unmarked)**.
	Selecting **Whole modified table only (unmarked)**, the modified table is shown in the redline as a new table with no changes marked. Selecting **Whole modified table only**, the modified table is also shown in the redline as a new table but it is shown as an insertion.
Table Cell Inserted Color	The color of inserted cells.

Parameter	Description
Table Cell Deleted Color	The color of deleted cells.
Table Cell Moved Color	The color of moved cells.
Table Cell Merged Color	The color of merged cells.
Table Cell Padding Color	The color of padded cells.

What are padded cells?

Padded cells occur when an insert and delete have occurred within a table, a cell becomes both an insert **and** a delete; therefore it creates a padded cell.

Original Table

Cell 1	Cell 2	Cell 3
Cell 4	Cell 5	Cell 6

Modified Table

Cell 1	Cell 3
Cell A	Cell B
Cell 4	Cell 6

Rendered Table

Cell 1	~~Cell 2~~	Cell 3
Cell A	PADDED CELL	**Cell B**
Cell 4	~~Cell 5~~	Cell 6

Appendix B. Configuring Comparison Themes

This appendix describes how to configure comparison themes for Workshare Compare for PowerPoint and apply them to a comparison. It includes the following sections:

- **Introducing Comparison Themes**, page 241, introduces Workshare Compare comparison themes and describes how they determine the look of a comparison.

- **Applying Comparison Themes**, page 241, describes how to apply a comparison theme to a comparison.

- **Customizing Comparison Themes**, page 242, describes how to create your own comparison themes as well as modify existing comparison themes.

- **Comparison Theme Parameters**, page 244, provides a detailed description of all the comparison theme parameters.

Introducing Comparison Themes

Workshare Compare for PowerPoint uses colors and different formats in the comparison to enable you to see the changes that have been made to the presentation.

The colors and formats adopted depend on the comparison theme applied to the comparison. Workshare Compare for PowerPoint includes a default comparison theme that you can apply or you can modify this comparison theme or create your own comparison theme.

Applying Comparison Themes

You can apply a comparison theme to a comparison before the comparison is run and also at any time after a comparison has been performed.

To apply a comparison theme before the comparison is run:

In the *Select Presentations for Comparison* dialog, select a comparison theme from the **Select Comparison Theme** dropdown list.

To apply a comparison theme after the comparison has been run:

In the **Comparison Themes** group of the **Home** tab, select a comparison theme from the **Select** dropdown list. Workshare Compare for PowerPoint re-performs the comparison applying the new comparison theme styles to the resulting comparison.

Customizing Comparison Themes

You can modify existing comparison themes as well as create new comparison themes. Comparison themes are created and modified in the Comparison Themes Manager.

To open the Comparison Themes Manager:

Select **Edit** in the **Comparison Themes** group of the **Home** tab. The Comparison Themes Manager is displayed.

Note: You can also click 🗔 *to the right of the* **Select Comparison Theme** *field in the Select Presentations for Comparison dialog.*
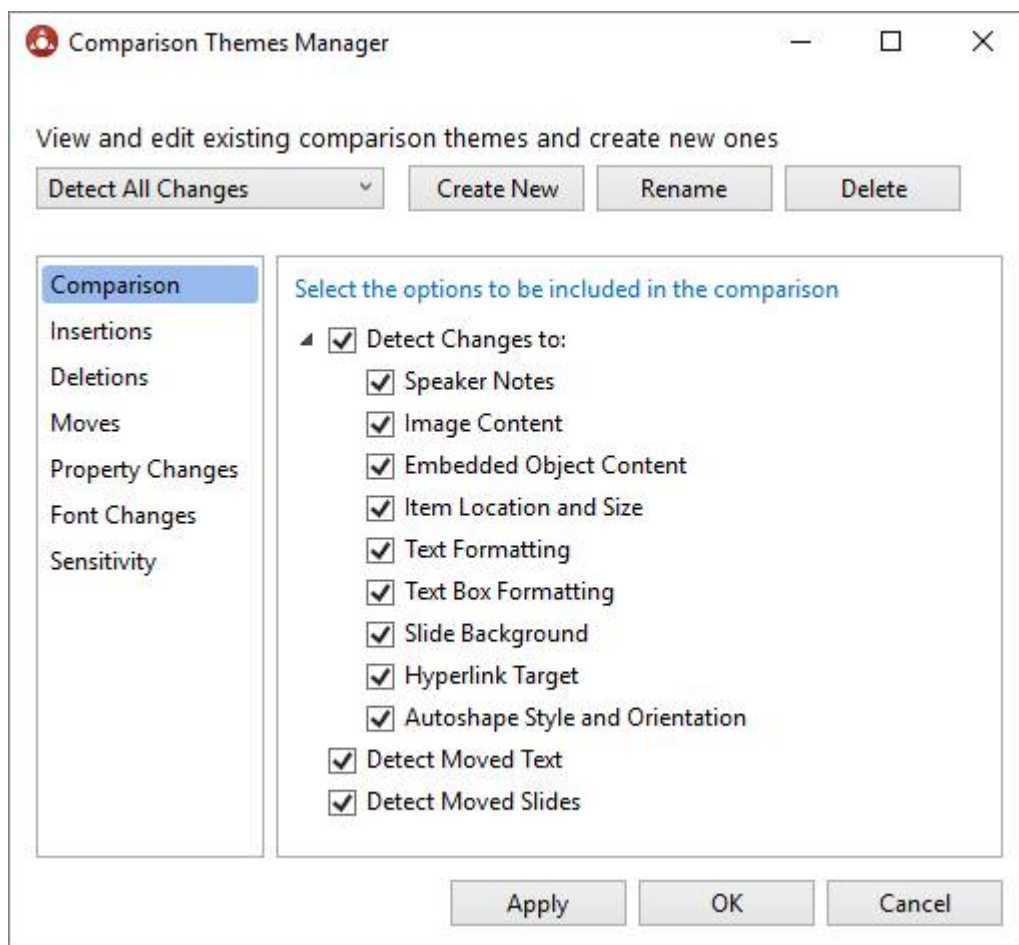
Comparison themes are made up of a set of parameters. The comparison theme parameters are grouped into categories. The categories appear in the left pane of the Comparison Themes Manager. Selecting a category displays the parameters for that category in the right pane of the Comparison Themes Manager. The different categories and their parameters are described in *Comparison Theme Parameters*.

Creating new comparison themes

You can create new comparison themes as required to determine the colors and formats used in the comparison to distinguish the changes that have been made to the presentation.

To create a new comparison theme:

1. In the Comparison Themes Manager, click **Create New**. The *Comparison Theme Name* dialog is displayed.
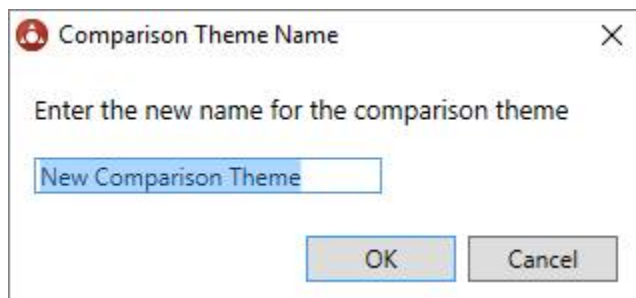
2. Enter a name for the comparison theme and click **OK**.

3. In the Comparison Themes Manager, specify the comparison theme parameters as follows:

   ▫ Click a category in the left pane to display parameters for that category in the right pane.

   ▫ Configure the parameters as required.

   Categories and their parameters are described in *Comparison Theme Parameters*.

4. Click **Apply**. The new comparison theme is saved.

*Note: When you click **OK** in the Comparison Themes Manager, Workshare Compare for PowerPoint re-performs the comparison applying the new comparison theme styles to the resulting comparison.*

Modifying existing comparison themes

You can modify existing comparison themes by changing the parameter settings for the comparison theme or changing the name of the comparison theme. You can also delete unwanted comparison themes.

To modify an existing comparison theme:

1. In the Comparison Themes Manager, select the comparison theme you want to modify from the dropdown list.

2. Modify the comparison theme parameters as follows:

 ▫ Click a category in the left pane to display parameters for that category in the right pane.

 ▫ Configure the parameters as required.

 Categories and their parameters are described in *Comparison Theme Parameters*.

3. Click **Apply**.

*Note: When you click **OK** in the Comparison Themes Manager, Workshare Compare for PowerPoint re-performs the comparison applying the new comparison theme styles to the resulting comparison.*

To rename a comparison theme:

1. In the Comparison Themes Manager, select the comparison theme from the dropdown list and click **Rename**. The *Comparison Theme Name* dialog is displayed.

2. Enter the new name for the comparison theme and click **OK**. The comparison theme is saved with the new name.

To delete a comparison theme:

In the Comparison Themes Manager, select the comparison theme that you want to delete from the dropdown list and click **Delete**. The comparison theme is deleted.

Note: You can delete one of the predefined comparison themes but all predefined comparison themes are regenerated when Workshare Compare for PowerPoint is launched.
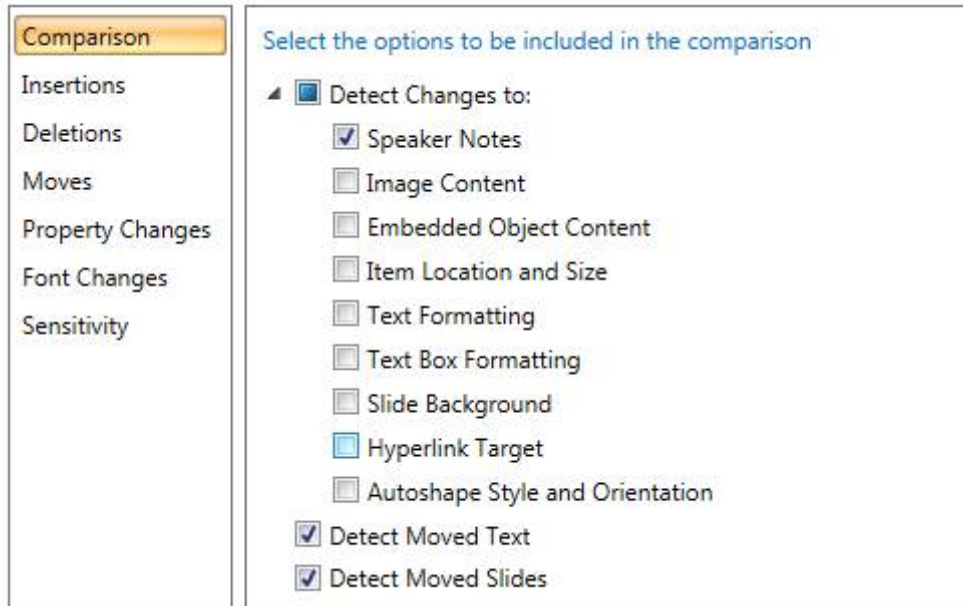
Comparison Theme Parameters

The comparison theme parameters for Workshare Compare for PowerPoint are grouped into the following categories:

- Comparison
- Insertions
- Deletions
- Moves
- Property Changes
- Font Changes
- Sensitivity

Comparison

The **Comparison** category includes parameters that enable you to specify what changes Workshare Compare for PowerPoint will detect.

The Comparison parameters are described in the following table:

Parameter	Description
Detect Changes to	Select the specific items that Workshare Compare for PowerPoint will detect changes to, from the following: **Speaker Notes**, **Image Content**, **Embedded Object Content**, **Item Location and Size**, **Text Formatting**, **Text Box Formatting**, **Slide Background**, **Hyperlink Target**, **Autoshape Style and Orientation**.
Detect Moved Text	If selected, moved text within slides is detected.
Detect Moved Slides	If selected, moved slides are detected.

Insertions

The **Insertions** category includes parameters that enable you to specify how inserted text as well as inserted images and objects will be displayed.

The Insertions parameters are described in the following table:

Parameter	Description
Insertion options	Select how insertions are displayed.
	You can select any or a combination of the following formatting options for inserted text: **Bold**, **Italic**, **Underline** and **Strikethrough**. (You cannot select **Underline** and **Strikethrough**.) You also select the font color from the **Color** dropdown list.
	Inserted images and objects are indicated with a dashed border in the selected color.
	An example of how inserted text, inserted images and inserted charts will look with your selections is shown.

Deletions

The **Deletions** category includes parameters that enable you to specify how deleted text as well as deleted images and objects will be displayed.

The Deletions parameters are described in the following table:

Parameter	Description
Deletion options	Select how deletions are displayed.
	You can select any or a combination of the following formatting options for deleted text: **Bold**, **Italic**, **Underline** and **Strikethrough**. (You cannot select **Underline** and **Strikethrough**.) You also select the font color from the **Color** dropdown list.
	Deleted images and objects are indicated with a dashed border in the selected color.
	An example of how deleted text, deleted images and deleted charts will look with your selections is shown.

Moves

The **Moves** category includes parameters that enable you to specify how moved text as well as moved images and objects will be displayed.

The Moves parameters are described in the following table:

Parameter	Description
Move source options	Select how the source of moves is displayed.
	You can select any or a combination of the following formatting options for source moved text: **Bold**, **Italic**, **Underline** and **Strikethrough**. (You cannot select **Underline** and **Strikethrough**.) You also select the font color from the **Color** dropdown list.
	The source of moved images and objects is indicated with a dashed border in the selected color.
	An example of how source moved text, source moved images and source moved charts will look with your selections is shown.

Parameter	Description
Move destination options	Select how the destination of moves is displayed.
	You can select any or a combination of the following formatting options for destination moved text: **Bold**, **Italic**, **Underline** and **Strikethrough**. (You cannot select **Underline** and **Strikethrough**.) You also select the font color from the **Color** dropdown list.
	The destination of moved images and objects is indicated with a dashed border in the selected color.
	An example of how destination moved text, destination moved images and destination moved charts will look with your selections is shown.

Property Changes

The **Property Changes** category includes parameters that enable you to specify how items that have had their properties changed will be displayed.

The Property Changes parameters are described in the following table:

Parameter	Description
Changed item option	Select a color from the **Color** dropdown list. Images and objects that have had their properties changed are indicated with a dashed border in the selected color.
	An example of how changed images and charts will look with your selection is shown.

Font Changes

The **Font Changes** category includes parameters that enable you to specify how text that has had its font changed will be displayed.

The Font Changes parameters are described in the following table:

Parameter	Description
Changed font option	Select a color from the **Color** dropdown list. Text that has had its font changed is displayed in the selected color.
	An example of how changed text will look with your selection is shown.

Sensitivity

The **Sensitivity** category includes parameters that enable you to specify how sensitive Workshare Compare for PowerPoint should be when detecting changes.

The Sensitivity parameters are described in the following table:

Parameter	Description
Slide similarity threshold (%)	Specify at what point insertions and deletions should no longer be marked individually but marked as an entire slide deleted and an entire slide inserted.
	For example, if you set the threshold at 30% and the similarity between the slides is calculated to be less than 30% then they will be shown as an inserted and deleted slide. If the similarity is calculated as more than 30% then the slides will be shown with changes found to individual items on the slides.
	Drag the slider to your required setting. As you drag the slider, the percentage is shown as a tool tip above the slider.

Parameter	Description
Text Box similarity threshold (%)	Specify at what point insertions and deletions in text boxes should no longer be marked individually but marked as an entire text box deleted and an entire text box inserted. Drag the slider to your required setting. As you drag the slider, the percentage is shown as a tool tip above the slider.
Table similarity threshold (%)	Specify at what point insertions and deletions in tables should no longer be marked individually but marked as an entire table deleted and an entire table inserted. Drag the slider to your required setting. As you drag the slider, the percentage is shown as a tool tip above the slider.
Minimum length for moved text	Specify the minimum number of characters to detect as a move – moved pieces of text shorter than this threshold will be shown as an insertion and a deletion. Drag the slider to your required setting. As you drag the slider, the length (in characters) is shown as a tool tip above the slider.
Threshold for detecting changes in size or position	Specify a threshold which determines how far an object must be moved (or by how much its size must be changed) for the change to be detected. The threshold value is measured in inches. Drag the slider to your required setting. As you drag the slider, the position (in inches) is shown as a tool tip above the slider.
Minimum ratio of unchanged text to surrounding changes	Specify at what point short matches of text should be ignored if they are surrounded on both sides by unmatched text. This prevents common words such as 'of', 'and' and 'the' being matched up in a paragraph where the content has been completely changed. Drag the slider to your required setting. As you drag the slider, the percentage is shown as a tool tip above the slider.

Note: Selecting extreme values for the Sensitivity parameters can lead to unusual comparison results. You can return the Sensitivity parameters to their default settings at any time by clicking **Reset All**.

# Appendix C. Configuring Workshare Desktop App

This appendix describes how to configure the Workshare desktop application (the desktop app). This is an application that syncs content between Workshare online and your desktop so you can access your files and continue collaborating from your desktop while offline.

Configuring the Workshare Desktop App

You can configure application settings for the Workshare desktop app, such as the location of the sync folder or general account settings.

To configure the Workshare desktop app:

1. Click the desktop app system tray icon and select **Preferences** or from the *File* menu in the desktop app main window, select **Preferences**. The following dialog is displayed.
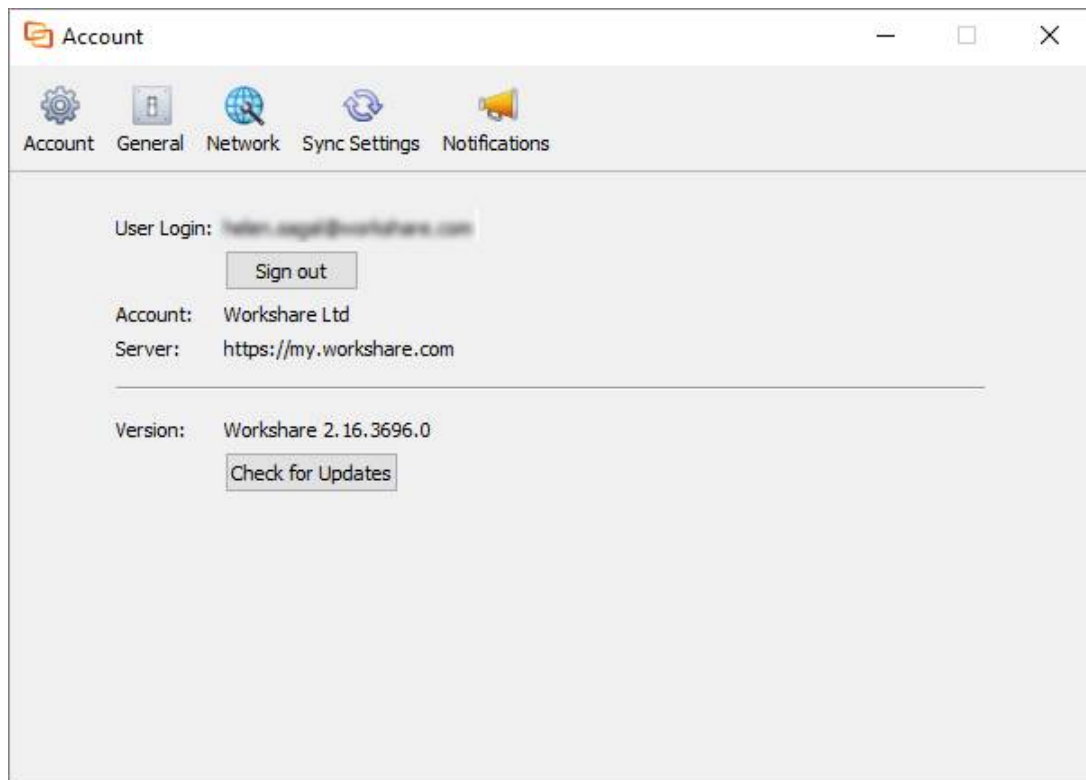
The **Account** page provides information about your account. You can see your registered Workshare email address that you use to log in to Workshare as well as the address to the Workshare server. Additionally, you have version information about the desktop app.

2. Select **General**.
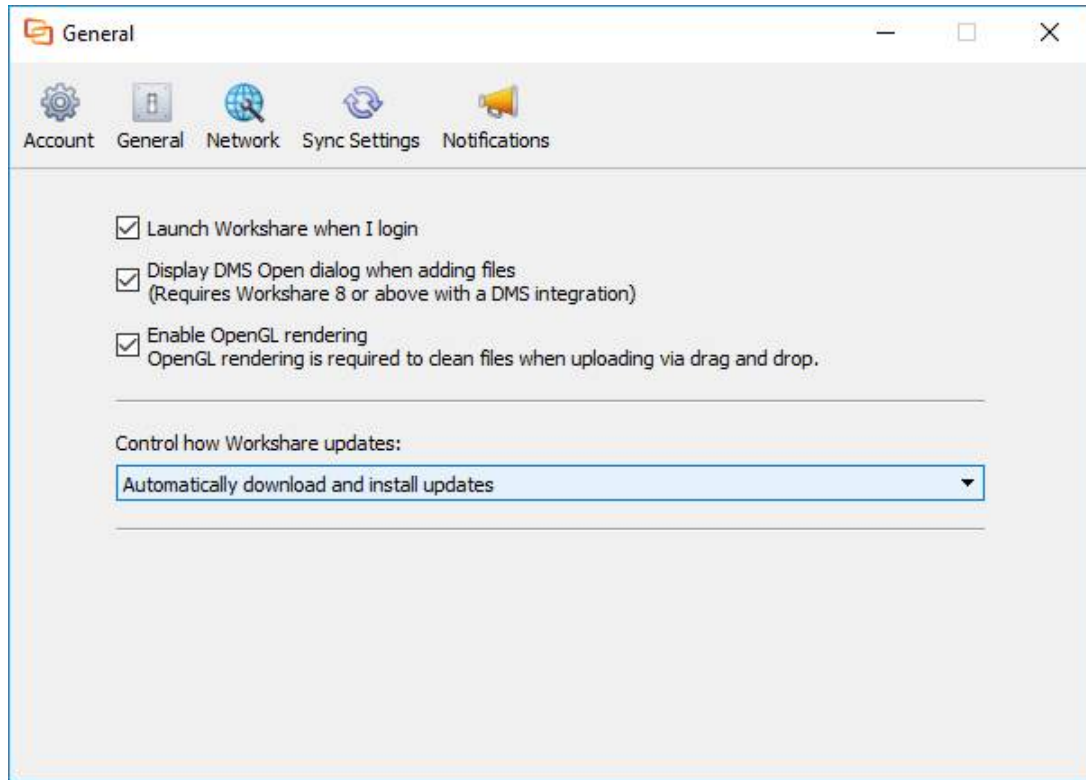
3. Select the **Launch Workshare when I login** checkbox and the desktop app will start when your computer is started.

4. When you have Workshare 9 (or above) with a DMS integration, select the **Display DMS Open dialog…** checkbox and you can select files from your DMS when uploading files to Workshare from the desktop app.

5. By default, the desktop app uses off-screen rendering (OpenGL rendering). In cases where off-screen rendering is not supported (for example, GPUs with older graphics drivers), the desktop app will automatically switch to on-screen rendering. If the desktop app cannot recognize that there is a problem with off-screen rendering, you can manually switch to on-screen rendering by deselecting the **Enable OpenGL rendering** checkbox.

> *Note*: *When using on-screen rendering, the clean/convert options will not be available when using drag and drop to add files. For more information about OpenGL rendering, refer to this article in the Workshare knowledge base.*

6. To control how Workshare updates, select from the dropdown:

   ▫ **Automatically download and install updates**: Updates to the desktop app will be downloaded and installed automatically as they become available.

   ▫ **Notify me when updates are ready to install**: You will be notified when updates to the desktop app are available.

7. Select **Network**.
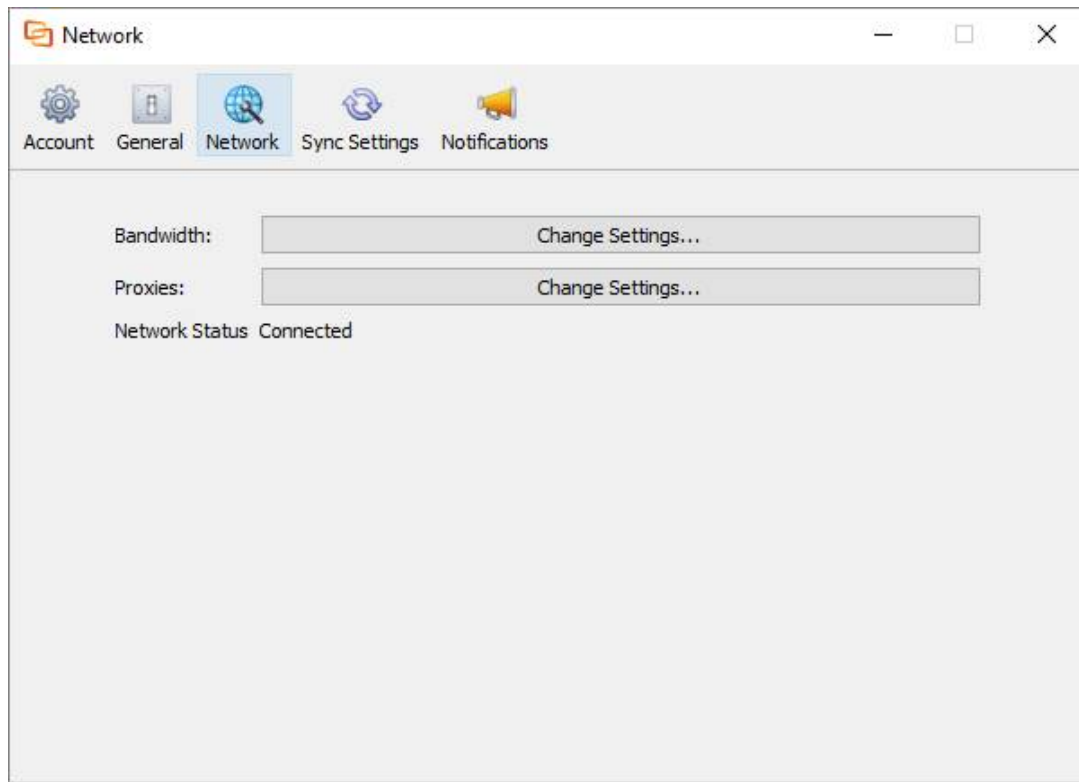
The Network page enables you to limit bandwidth settings and change the settings of your proxy server.

8. In the **Bandwidth** field, click **Change Settings**.
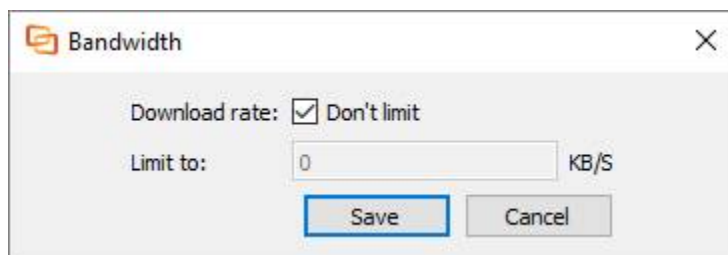
9. If you want to limit the bandwidth available to data downloaded to the desktop app, deselect the **Don't limit** checkbox and specify the limit in the **Limit to** field.

10. Click **Save**.

11. In the **Proxies** field, click **Change Settings**.
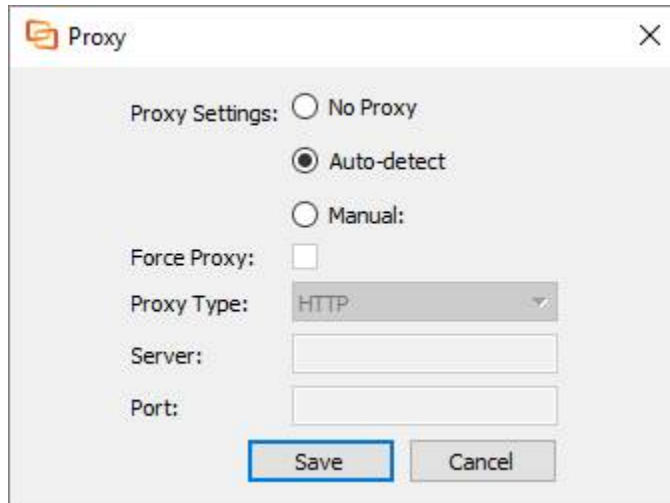
12. When working with a proxy server, select **Auto-detect** and Workshare will use your computer's system settings to connect to the network, or select **Manual** and enter your proxy server details manually.

> *Note: There is no **Auto-detect** option available when working on a Mac.*

13. When manually specifying proxy server settings, you can select **Force Proxy** so that the desktop app traffic MUST go via your proxy server and if the proxy server is not available then the desktop app will be offline.

14. Select the type of your proxy server (**HTTP**, **HTTP Caching** or **Socks5**) and enter the server address and port number.

15. Click **Save**.

16. Select **Sync Settings**.
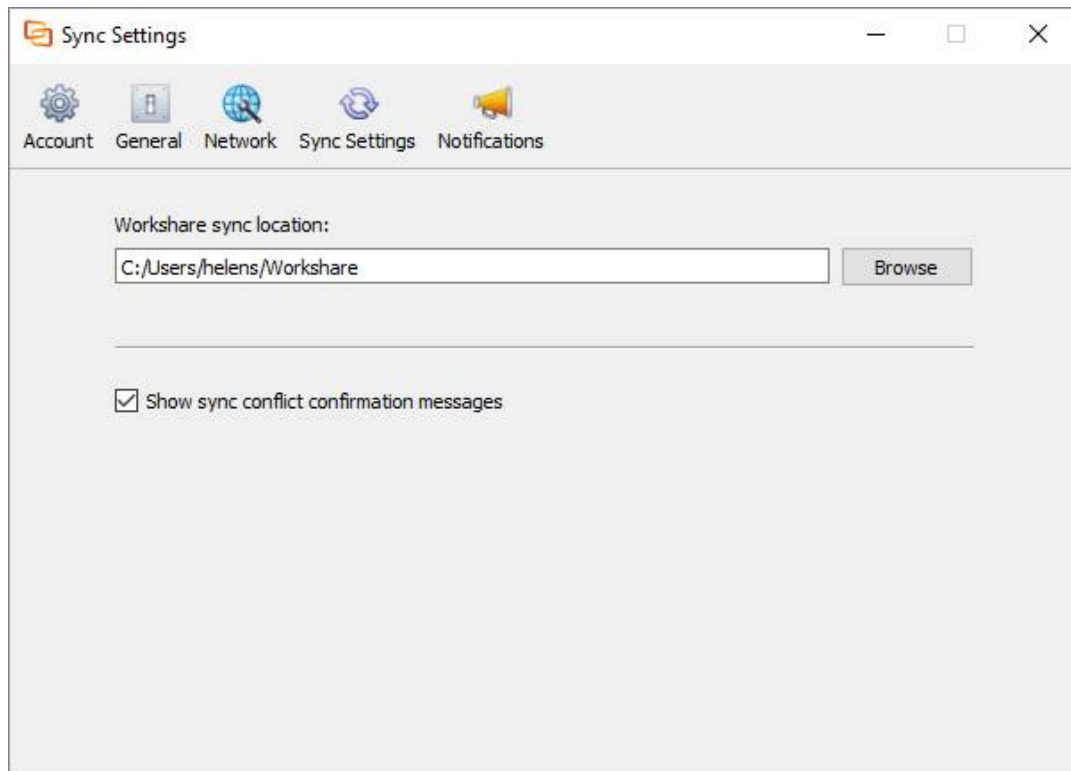
17. If required, change the location of the Workshare sync folder by clicking the browse button and selecting a different location. By default, this folder is named and located as follows:

   ▫ Windows: C:\Users\[user name]\Workshare
   ▫ Mac: /Users/[user name]/Workshare

   Any files or folders put in this folder will be synced to Workshare online and will appear in the desktop app.

18. Select **Notifications**.
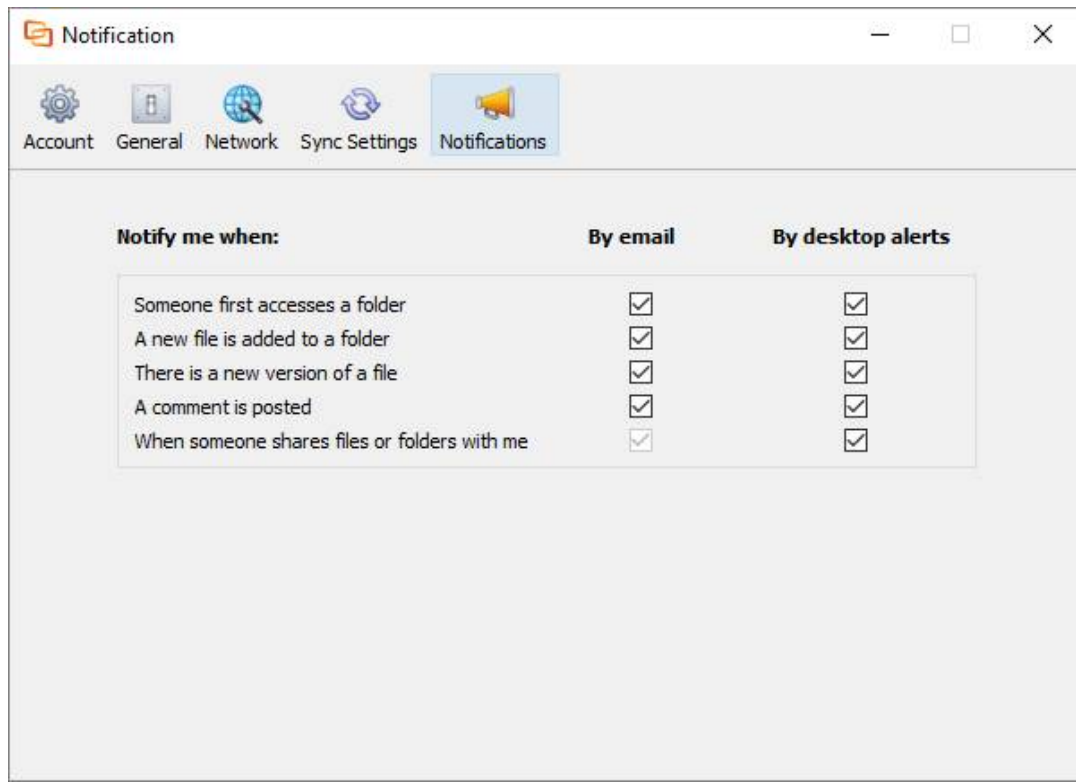
19. If required, change the notification settings. By default, users receive notifications by email and via desktop popup alerts in the following circumstances:

   - When a user first accesses a folder you have shared with them
   - When a new file is added to a shared folder
   - When there is a new version of a file
   - When a comment is posted
   - When someone shares a file or folder with you