

Workshare Professional 10.1

Configuration Options

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Workshare Configuration Parameters


The configuration parameters for Workshare Professional, Workshare Compare and Workshare Protect are in the Workshare Configuration Manager. They are grouped into categories and sub-categories as follows:

| Category | Sub-Category | Page |
|---------------------|----------------------|------|
| Protection | Administration | 4 |
| | Sharing | 9 |
| | Interactive Protect | 12 |
| | Remove Metadata | 20 |
| | Exclude Metadata | 28 |
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Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in the following sections.

Protection > Administration

The **Protection > Administration** parameters enable you to specify how Workshare Protect functions in specific situations.


Administration
 Configure how Workshare Protect functions in specified situations.

| | Internal Email | External Email |
|--|--------------------------|-------------------------------------|
| Apply Workshare Protect | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Detect Workshare styles | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> <input type="checkbox"/> | | |
| <input checked="" type="checkbox"/> Allow users to change metadata removal options | | |
| <input checked="" type="checkbox"/> Allow users to change PDF options | | |
| <input checked="" type="checkbox"/> Allow users to skip metadata removal | | |
| <input type="checkbox"/> Cache distribution lists | | |
| <input type="checkbox"/> Cache distribution lists refresh rate (days) <input type="text" value="30"/> | | |
| <input type="checkbox"/> Content risk runtime policy path (this overrides the default path) <input type="text"/> | | |
| <input checked="" type="checkbox"/> Display Advanced Options | | |
| <input checked="" type="checkbox"/> Display progress bar on Send | | |
| <input type="checkbox"/> Display Send with Protect button (Outlook) | | |
| <input checked="" type="checkbox"/> Enable automatic generation of default profile | | |
| <input checked="" type="checkbox"/> Enable Lightspeed Clean | | |
| <input checked="" type="checkbox"/> Enable Secure File Transfer when sending emails | | |
| <input type="checkbox"/> Internal Domain List (Lotus Notes) <input type="text"/> | | |
| <input type="checkbox"/> Proxy address <input type="text"/> | | |

The **Protection > Administration** parameters are described in the following table:

| Parameter | Description | Default |
|--------------------------------|--|--|
| Apply Workshare Protect | If selected, Workshare Protect will check emails and their attachments to see if they breach any security policies. | Internal: Not selected External: Selected |
| Detect Workshare styles | If selected, Workshare Protect will check emails and their attachments to see if they include any Workshare styles. Workshare styles are applied to changes in a Redline document. | Internal: Not selected External: Not selected |

| Parameter | Description | Default |
|---|---|--------------|
| Allow users to change metadata removal options | <p>Administrator Mode only.</p> <p>If selected, the Remove Comments and the Remove Track Changes checkboxes as well as the Office Metadata and PDF Metadata tabs are available in the <i>Advanced Email Security Options</i> dialog. These options enable the user to specify exactly which hidden data types to remove from an attachment.</p> <p>This parameter has no effect on the <i>Protect Profile</i> dialog or Interactive Protect panel.</p> | Selected |
| Allow users to change PDF options | <p>Administrator Mode only.</p> <p>If selected, the Convert to PDF checkbox as well as the Convert to PDF tab are available in the <i>Advanced Email Security Options</i> dialog. These options enable the user to specify whether or not to convert an attachment to PDF and what, if any, PDF security settings to apply.</p> <p>This parameter has no effect on the <i>Protect Profile</i> dialog or Interactive Protect panel.</p> | Selected |
| Allow users to skip metadata removal | <p>Administrator Mode only.</p> <p>If selected, the Skip Cleaning checkbox is enabled in the <i>Advanced Email Security Options</i> dialog, the Send without processing option is available in the <i>Protect Profile</i> dialog and the Remove metadata checkbox is enabled in the Interactive Protect panel. In the <i>Advanced Email Security Options</i> dialog and the Interactive Protect panel, this option enables the user to omit all metadata cleaning. In the <i>Protect Profile</i> dialog, this option enables the user to skip all processing, for example, all metadata cleaning and PDF conversion.</p> | Selected |
| Cache distribution lists | <p>If selected, once Workshare Protect has resolved a distribution list (determined if it should be treated as external or internal), the results are stored locally. In this way, when the distribution list is used again, Workshare Protect can quickly determine whether to treat the email as internal or external.</p> <p>In addition, if this parameter is selected, when Microsoft Outlook is launched, Workshare Protect will resolve all distribution lists in the global address book and store the results. This is done in the background.</p> | Not selected |
| Cache distribution lists refresh rate (days) | <p>This parameter is relevant when the Cache distribution lists parameter is selected. The results from resolving distribution lists are refreshed after the specified number of days.</p> | 30 |

| Parameter | Description | Default |
|---|---|--------------|
| Content risk runtime policy path (this overrides the default path) | <p>Administrator Mode only.</p> <p>If specified, Workshare will use this policy when discovering content risk in open Office documents. This is relevant when the default policy is not used and customized policies have been created using the Workshare Policy Designer.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Note: If you use a personalized company profile and you do not want the default profile to exist as well, you should also deselect the Enable automatic generation of default profile parameter.</p> </div> | |
| Display Advanced Options | If selected, the Advanced Options link is enabled in the <i>Protect Profile</i> dialog providing access to the <i>Advanced Email Security Options</i> dialog. | Selected |
| Display progress bar on Send | If selected, a progress bar appears when cleaning and sending an email. | Selected |
| Display Send with Protect button (Outlook) | If selected, a Send and Protect button is displayed in email messages. Clicking this button enables the user to always access the <i>Advanced Email Security Options</i> dialog (regardless of policy settings) and specify cleaning or converting to PDF of attachments as required. | Not selected |
| Enable automatic generation of default profile | <p>If selected, the default profile is regenerated when a value is changed in the Registry for an option in the Protection category. This change may be as a result of a manual change made in the Registry or by changing and applying a parameter value in the Protection category of the Workshare Configuration Manager. Additionally, the default profile is also regenerated when the Workshare Configuration Assistant is run.</p> <p>You may want to deselect this parameter if you want to deploy a personalized company profile and you do not want the default profile to exist as well.</p> | Selected |
| Enable Lightspeed Clean | If selected, when an email or its attachment triggers a Clean action, Workshare Protect will perform a Lightspeed clean. This type of cleaning is faster than a regular clean. | Selected |


| Parameter | Description | Default |
|--|---|------------------------|
| Enable Secure File Transfer when sending emails | If selected, the Secure File Transfer profiles are available in the <i>Protect Profile</i> dialog and users can securely send files by replacing attachments with a link to the documents in Workshare online. This parameter has no effect on the Interactive Protect panel. | Selected |
| Internal Domain List (Lotus Notes) | In multi-domain Notes environments, specify the domain names of all internal servers to ensure that internal/external resolution works correctly. Separate each domain name with a semicolon. | |
| Proxy address | The URL of an Internet proxy server (if used). | |
| Proxy password | The password to access an Internet proxy server (if used). | |
| Proxy port | The port of an Internet proxy server (if used). | |
| Proxy username | The user name to access an Internet proxy server (if used). | |
| Report on content policy violations | If selected, Workshare will search for specific text or patterns of text in the body of a document. This is only relevant if you are working with custom policies built using the Workshare Policy Designer. | Not selected |
| Server Profile Distribution List | The name of the distribution list on Microsoft Exchange Server that is used to return the correct Workshare Protect Server profile email addresses. This is only relevant when selecting Protect Profile dialog using server profiles as the value for the When sending an email with attachments show parameter. | ProtectServer_Profiles |
| Show Default profile in Protect Profile dialog | If selected, the default profile is available in the <i>Protect Profile</i> dialog. | Selected |
| Treat footnotes as metadata | If selected, footnotes are also treated as hidden data. You will be able to see details of the footnotes in a document in the content risk report. | Not selected |

| Parameter | Description | Default |
|--|---|--|
| Treat the specified addresses as internal (Outlook) | You can specify any email addresses/distribution lists/domains here that you would like to be treated as internal for the purpose of Workshare Protect applying policies. Separate multiple addresses with a semicolon. For example, john@yahoo.com; *@hotmail.com will mean that emails to john's individual yahoo email address are treated as internal as well as emails to any hotmail addresses. | |
| Use proxy server | If selected, a proxy server (as specified in the parameters above) is used for connecting to the Internet. | Not selected |
| When sending an email with attachments show | <p>Shows the required behavior when Workshare Protect is enabled. Options are:</p> <ul style="list-style-type: none"> • Interactive Protect: The Interactive Protect panel is displayed in the email message window as soon as attachments are added providing options to clean attachments, convert them to PDF and compress them as well as securely transfer the attachments to Workshare online. <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Note: <i>The Interactive Panel is displayed for all emails with attachments regardless of your selection for the Apply Workshare Protect parameter.</i></p> </div> <ul style="list-style-type: none"> • Protect Profile dialog using desktop profiles: The <i>Protect Profile</i> dialog is displayed after clicking Send. It provides a list of profiles available locally. • Protect Profile dialog using server profiles: The <i>Protect Profile</i> dialog is displayed after clicking Send. It provides a list of profiles available on Workshare Protect. • Email security dialog for all mail: The <i>Advanced Email Security Options</i> 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 <i>Advanced Email Security Options</i> dialog is displayed when an email has internal recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to external recipients only, the <i>Advanced Email Security Options</i> dialog is not displayed. This is only relevant when Apply Workshare Protect is selected for Internal Email. | <p>Interactive Protect</p> <p>In IBM Notes environments, the default setting is Protect Profile dialog using desktop profiles.</p> |

| Parameter | Description | Default |
|-----------|---|---------|
| | <ul style="list-style-type: none"> • Email security dialog for external mail only: The <i>Advanced Email Security Options</i> dialog is displayed when an email has external recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to internal recipients only, the <i>Advanced Email Security Options</i> dialog is not displayed. This is only relevant when Apply Workshare Protect is selected for External Email. • No dialog (process actions transparently): The <i>Advanced Email Security Options</i> dialog is not displayed. Workshare Protect processes the email and applies the default profile without any user intervention. | |

Protection > Sharing

The **Protection > Sharing** parameters enable you to configure how Workshare Protect uploads attachments to Workshare online.



Sharing

Configure upload of attachments to Workshare

| | | |
|--|-------------------------------------|---|
| | <input type="checkbox"/> | |
| | <input type="checkbox"/> | Automatically convert to link(s) when total... |
| | <input checked="" type="checkbox"/> | Display Attach as Link button (Outlook) |
| | <input type="checkbox"/> | Display Link on attachments bar |
| | <input checked="" type="checkbox"/> | Display Manage Permissions on attachments bar |
| | <input checked="" type="checkbox"/> | Enable Workshare Connect - real time collaboration |
| | <input type="checkbox"/> | Ignore these Bcc addresses |
| | <input type="checkbox"/> | Retain attachments in Sent Item. |
| | <input type="checkbox"/> | Select 'Retain attachments in Sent Item' checkbox by default (Interactive Protect only) |
| | <input type="text"/> | Share email body prefix |
| | <input type="text"/> | Share email body prefix (multiple files) |
| | <input type="text"/> | SSO Domain Name |

The **Protection > Sharing** parameters are described in the following table:

| Parameter | Description | Default |
|---|--|--------------|
| Automatically convert to link(s) when total attachment size exceeds (MB) | <p>When attachments exceed the size specified then they will automatically be converted to links. This means the attachments will be saved to a folder in Workshare and recipients receive a link to that folder. The user will see the link in the body of their email. They can still select to clean/convert/compress the attachment. Only when they click Send will the link be sent to the recipient.</p> <p><i>Note: This option works as described regardless as to how Protect is configured.</i></p> | |
| Display Attach as Link button (Outlook) | If selected, the Attach as Link button is displayed in email messages. Clicking this button enables the user to use the sharing functionality to send a link to a large file when it cannot be sent by email. (Your administrator may set a limit on the size of files you can email to avoid large files blocking Exchange.) | Selected |
| Display Link on attachments bar | <p>If selected, users can always click Link on their attachments bar to convert their attachments to links. The attachments will be saved to a folder in Workshare and recipients will receive a link to that folder. The user can still select to clean/convert/compress the attachment. Only when they click Send will the link be sent to the recipient.</p> <p><i>Note: This option works as described regardless as to how Protect is configured.</i></p> | Not selected |
| Display Manage Permissions on attachments bar | If selected, when attachments have been converted to links, a Manage Permissions option is displayed on the attachments bar. Clicking this option enables the user to set access permissions to the attachment(s) in Workshare. For example, you could set an expiry date so the files are only available for a limited time. | Selected |

| Parameter | Description | Default |
|---|---|------------------------------|
| Enable Workshare Connect – real time collaboration | If selected, the save and share to Workshare online options (Sharing group) are available in the Workshare tab in Office. | Selected |
| Ignore these Bcc addresses | <p>When attachments are uploaded to Workshare online, ALL recipients (including Bcc recipients) receive an email with a link to the attachments. Bcc recipients therefore do not remain hidden from other recipients.</p> <p>If no email addresses are specified for this parameter, when an email includes a Bcc address, Workshare prompts the sender to remove the Bcc address, as it will not remain hidden.</p> <p>If email addresses are specified here, when they appear in the Bcc field, Workshare will not prompt but will treat the email addresses as ordinary recipients.</p> <p>Separate multiple addresses with a semicolon. For example, john@yahoo.com; *@hotmail.com will mean that when john's individual yahoo email address or any hotmail addresses appear in the Bcc field, Workshare will not prompt the sender to remove the Bcc address but will treat the email addresses as ordinary recipients.</p> | |
| Retain attachments in Sent Item | If selected, when an attachment is replaced with a link to the file in Workshare, the email saved in the senders Sent folder includes the actual document attachment. | Not selected |
| Select 'Retain attachments in Sent Item' by default (Interactive Protect only) | <p>Administrator Mode only.</p> <p>If selected, the Retain attachments in Sent Item parameter is selected by default.</p> | Not selected |
| Share email body prefix | The text included in the body of the email sent when sharing an attachment from Interactive Protect. | I've shared a file with you: |
| Share email body prefix (multiple files) | The text included in the body of the email sent when sharing multiple attachments from Interactive Protect. | I've shared files with you: |
| SSO Domain Name | The domain name used for single sign on to Workshare. | |

| Parameter | Description | Default |
|-----------------------------------|--|---------|
| Workshare user login email | User Mode only. The email address used for the login to your Workshare account. | |


Protection > Interactive Protect

The **Protection > Interactive Protect** parameters enable you to configure how the Interactive Protect panel will appear to users.

The parameters in the top half enable you to specify what metadata should be visible in the Interactive Protect panel and what metadata is cleaned by default.

The parameters in the lower half enable you to specify whether users will be able to access and modify settings in the Interactive Protect panel.

***Tip!** You can select all parameters in a column by selecting the checkbox in the column header and then deselect one or two metadata parameters within that column as required.*



Interactive Protect

With Interactive Protect, all hidden data in email attachments – including track changes and comments left in documents – is highlighted for users.

| | Visible | Default |
|--|--|---|
| | <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> |
| Accept changes and turn off Track Changes (Word and Excel) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> |
| Convert attached template to Normal (Word) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Convert field codes to text (Office) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Delete attachments (PDF) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Delete bookmarks (PDF) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| Delete built-in properties (Office) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |

☐ ☒ ☐

| | |
|---|--|
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Allow users to change metadata removal options |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Allow users to change PDF options |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Allow users to compress to zip |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Allow users to convert to pdf |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Allow users to share files on Workshare |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Auto apply on send for external emails |
| <input checked="" type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> Auto apply on send for internal emails |

The **Protection > Interactive Protect** parameters are described in the following table:

| Parameter | Description | Default |
|---|---|-------------------|
| Accept changes and turn off Track Changes (Word and Excel) | Microsoft Word and Excel. If selected, 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. | Visible, No clean |
| Convert attached template to Normal (Word) | Microsoft Word only. If selected, 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. | Visible, Clean |
| Convert field codes to text (Office) | <p>Microsoft Word, Excel and PowerPoint. If selected, 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.</p> <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.</p> </div> <p>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.</p> <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Note: You can prevent certain field codes from being cleaned, for example, table of contents or page numbers, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> </div> | Visible, Clean |
| Delete attachments (PDF) | <p>PDF only. If selected, removes any attachments to a PDF file.</p> <p>PDF attachments are separate files attached to a PDF file generally or linked to a specific point in a PDF file. Selecting this option will only remove the first type of attachment. Attachments linked to a specific point in a PDF file are treated as markups and will only be removed if the Delete markups parameter is selected.</p> | Visible, Clean |
| Delete bookmarks (PDF) | PDF only. If selected, removes any bookmarks in a PDF file. | Visible, Clean |

| Parameter | Description | Default |
|--|--|---------------------|
| Delete built-in properties (Office) | Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number. | Visible, Clean |
| Delete comments (Office) | Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document. | Visible, No clean |
| Delete custom properties (Office) | <p>Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document.</p> <p>Note: You can prevent certain custom properties from being cleaned, for example, DMS Doc ID Properties, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> | Visible, Clean |
| Delete custom XML parts (Word) | Microsoft Word only. If selected, removes custom XML parts (embedded XML data) from a document. | Invisible, No clean |
| Delete document reviewers (Word) | <p>Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed.</p> <p>Note: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.</p> | Visible, Clean |

| Parameter | Description | Default |
|--|---|-------------------|
| Delete document variables (Word) | <p>Microsoft Word only. If selected, deletes all document variables.</p> <p>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.</p> <p>Variables can be viewed in Microsoft Word in the Visual Basic Editor.</p> | Visible, Clean |
| Delete footers (Excel and PowerPoint) | Microsoft Excel and PowerPoint. If selected, removes any footers included in the sheet or slide. | Visible, Clean |
| Delete footnotes (Word) | Microsoft Word only. If selected, removes any footnotes or endnotes included in the document. | Visible, No clean |
| Delete headers (Excel and PowerPoint) | Microsoft Excel and PowerPoint. If selected, removes any headers included in the sheet or slide. | Visible, Clean |
| Delete hidden slides (PowerPoint) | Microsoft PowerPoint only. If selected, 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. | Visible, Clean |
| Delete hidden text (Word) | Microsoft Word only. If selected, removes all text that has been formatted as hidden. | Visible, Clean |
| Delete links (Excel) | <p>Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links:</p> <p>Link to a cell in another Microsoft Excel document.</p> <p>Named link to a named reference in another Microsoft Excel document.</p> <p>Link to another document.</p> <p>OLE link that inserts another document as an icon.</p> <p>OLE link that inserts another document as text.</p> | Visible, Clean |

| Parameter | Description | Default |
|--|--|-------------------|
| Delete macros (Word and Excel) | Microsoft Word and Excel. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros. | Visible, Clean |
| Delete markup annotations (PDF) | <p>PDF only. If selected, removes any markup in a PDF file.</p> <p>Markup is a tool used to make comments and annotations to PDF documents.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: You can prevent certain markup annotations from being cleaned, for example, Highlight annotations or Strike Out annotations, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> </div> | Visible, Clean |
| Delete previous authors (Word) | <p>Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations.</p> <p>This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.</p> | Visible, Clean |
| Delete properties (PDF) | <p>PDF only. If selected, removes properties in a PDF file.</p> <p>Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: Removing properties from a PDF/A file will disable its PDF/A status.</p> </div> | Visible, No clean |
| Delete routing slip (Word and Excel 2003) | <p>Microsoft Word and Excel. If selected, 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.</p> <p>Routing slips are not supported in Microsoft Office 2007 and above.</p> | Visible, Clean |

| Parameter | Description | Default |
|---|---|-------------------|
| Delete Smart Tags (Word 2003/2007) | <p>Microsoft Word only. If selected, removes smart tags from Microsoft Word documents.</p> <p>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.</p> <p>Smart tags only exist in Microsoft Office XP to 2010.</p> | Visible, Clean |
| Delete Speaker Notes (PowerPoint) | <p>Microsoft PowerPoint only. If selected, 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.</p> | Visible, Clean |
| Delete text smaller than 5pt (Word) | <p>Microsoft Word only. If selected, removes all text that has been formatted with a font size less than 5pt (i.e. 4pt and less).</p> | Visible, No clean |
| Delete versions (Word 2003) | <p>Microsoft Word only. If selected, 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.</p> <p>Document versions are not supported in Microsoft Word 2007 and above.</p> | Visible, Clean |
| Delete white text on white background (Word) | <p>Microsoft Word only. Removes all text with a white font that has been formatted with a white background color.</p> | Visible, No clean |
| Reset document statistics (Word) | <p>Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: This information cannot be cleaned from within Microsoft Word.</p> </div> | Visible, Clean |

| Parameter | Description | Default |
|---|--|----------------|
| Turn off versioning (Word 2003) | Microsoft Word only. If selected, 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. Versioning is not supported in Microsoft Word 2007 and above. | Visible, Clean |
| Allow users to change metadata removal options | Administrator Mode only. If selected, users can modify the individual metadata options selected in the Clean files section of the Interactive Protect panel. | Selected |
| Allow users to change PDF options | Administrator Mode only. If selected, users can modify the individual pdf options selected in the Convert to PDF section of the Interactive Protect panel. | Selected |
| Allow users to compress to zip | Administrator Mode only. If selected, the Compress all to zip section is visible to the user in the Interactive Protect panel. | Selected |
| Allow users to convert to pdf | Administrator Mode only. If selected, the Convert to PDF section is visible to the user in the Interactive Protect panel. | Selected |
| Allow users to share files on Workshare | Administrator Mode only. If selected, the Convert to link section is visible to the user in the Interactive Protect panel. | Selected |
| Auto apply on send for external emails | Administrator Mode only. If selected, when a user does NOT click Apply in the Interactive Protect panel, the Interactive Protect settings from the Interactive Protect panel will still be applied when the user clicks Send. This parameter applies to external emails only. If not selected and the user forgets to click Apply before sending an external email, the email is sent without processing by Protect. | Selected |

| Parameter | Description | Default |
|---|---|-------------------------|
| Auto apply on send for internal emails | <p>Administrator Mode only.</p> <p>If selected, when a user does NOT click Apply in the Interactive Protect panel, the Interactive Protect settings from the Interactive Protect panel will still be applied when the user clicks Send. This parameter applies to internal emails only.</p> <p>If not selected and the user forgets to click Apply before sending an internal email, the email is sent without processing by Protect.</p> | Not selected |
| Automatically select 'Convert to link' when total attachment size exceeds (MB) | <p>Administrator Mode only.</p> <p>When attachments exceed the size specified then the Replace all attachments with a link checkbox in the Interactive Protect panel will be selected by default.</p> | |
| Automatically show panel when: | <p>Administrator Mode only.</p> <p>Determines when the Interactive Protect panel will be automatically displayed in an email window. The options are: Any attachment is added, Metadata is detected, Always, Never.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p><i>Note: If the Interactive Protect panel is set to never open automatically, users can display it by clicking the notification across the top of the email window or click Protect Files in the Message tab.</i></p> </div> | Any attachment is added |
| Convert attachments to PDF | <p>Administrator Mode only.</p> <p>If selected, the Convert selected file(s) checkbox in the Convert to PDF section of the Interactive Protect panel is selected by default.</p> | Not selected |
| Default for 'Set an access expiry date' (days) | <p>Administrator Mode only.</p> <p>When a number is specified, the Set an access expiry date checkbox in the Interactive Protect panel will be selected by default and the expiry date will be set to the specified number of days after today.</p> | |
| Display progress when auto-applying on send | <p>Administrator Mode only.</p> <p>If selected, when either of the Auto apply... parameters are selected and the Interactive Protect settings are automatically applied when the user clicks Send, a progress bar is displayed.</p> | Selected |

| Parameter | Description | Default |
|--|---|--------------|
| Select 'Get return receipt' checkbox by default | Administrator Mode only. If selected, the Get return receipt checkbox in the Convert to link section of the Interactive Protect panel is selected by default. | Not selected |
| Select 'Recipients can download files' checkbox by default | Administrator Mode only. If selected, the Recipients can download files checkbox in the Convert to link section of the Interactive Protect panel is selected by default. | Selected |
| Select 'Recipients can invite others to this folder' checkbox by default | Administrator Mode only. If selected, the Recipients can invite others to this folder checkbox in the Convert to link section of the Interactive Protect panel is selected by default. | Selected |
| Select 'Recipients must login to access files' checkbox by default | Administrator Mode only. If selected, the Recipients must login to access files checkbox in the Convert to link section of the Interactive Protect panel is selected by default. | Selected |
| Select 'Remove metadata' checkbox by default | Administrator Mode only. If selected, the Remove metadata checkbox in the Clean files section of the Interactive Protect panel is selected by default. | Selected |

Protection > Remove Metadata


The **Protection > Remove Metadata** parameters enable you to modify the default metadata removal policy, which Workshare Protect applies in the following situations:

- When discovering and removing content risk from Open Microsoft Office documents
- When Workshare Protect is configured to use the *Advanced Email Security Options* dialog (internal and/or external email)
- When Workshare Protect is configured to use the *Protect Profile* dialog (if the user selects the default profile)

Note: The default policy is NOT applied when Workshare Protect is configured to use the Interactive Protect panel.










































The parameters in this category list the types of metadata that can be removed by Workshare Protect. To select a metadata type, you select the checkbox to the right of the parameter in the relevant column – **Internal Email**, **External Email**, **Content Risk**.

Tip! You can select all parameters in a column by selecting the checkbox in the column header and then deselect one or two metadata parameters within that column as required.



Remove Metadata

Specify what hidden data is removed from email attachments sent internally and externally and from open Microsoft Office documents.

| | Internal Email | External Email | Content Risk |
|--|---|---|---|
| | <input type="checkbox"/>  <input type="checkbox"/> | <input type="checkbox"/>  <input type="checkbox"/> | <input type="checkbox"/>  <input type="checkbox"/> |
| Accept changes and turn off Track Changes (Word and Excel) |  <input type="checkbox"/> |  <input type="checkbox"/> |  <input type="checkbox"/> |
| Convert attached template to Normal (Word) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Convert field codes to text (Office) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete attachments (PDF) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> | |
| Delete bookmarks (PDF) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> | |
| Delete built-in properties (Office) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete comments (Office) |  <input type="checkbox"/> |  <input type="checkbox"/> |  <input type="checkbox"/> |
| Delete custom properties (Office) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete custom XML parts (Word) |  <input type="checkbox"/> |  <input type="checkbox"/> |  <input type="checkbox"/> |
| Delete document reviewers (Word) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete document variables (Word) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete footers (Excel and PowerPoint) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete footnotes (Word) |  <input type="checkbox"/> |  <input type="checkbox"/> |  <input type="checkbox"/> |
| Delete headers (Excel and PowerPoint) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete hidden slides (PowerPoint) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete hidden text (Word) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete links (Excel) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |
| Delete macros (Word and Excel) |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |  <input checked="" type="checkbox"/> |

The **Protection > Remove Metadata** parameters are described in the following table:

| Parameter | Description | Default |
|---|---|--|
| Accept changes and turn off Track Changes (Word and Excel) | Microsoft Word and Excel. If selected, 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. | Internal: Not selected External: Not selected Content Risk: Not selected |
| Convert attached template to Normal (Word) | Microsoft Word only. If selected, 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. | Internal: Selected External: Selected Content Risk: Selected |
| Convert field codes to text (Office) | <p>Microsoft Word, Excel and PowerPoint. If selected, 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.</p> <p>Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.</p> <p>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.</p> <p>Note: You can prevent certain field codes from being cleaned, for example, table of contents or page numbers, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> | Internal: Selected External: Selected Content Risk: Selected |
| Delete attachments (PDF) | <p>PDF only. If selected, removes any attachments to a PDF file.</p> <p>PDF attachments are separate files attached to a PDF file generally or linked to a specific point in a PDF file. Selecting this option will only remove the first type of attachment. Attachments linked to a specific point in a PDF file are treated as markups and will only be removed if the Delete markups parameter is selected.</p> | Internal: Selected External: Selected |

| Parameter | Description | Default |
|--|--|--|
| Delete bookmarks (PDF) | PDF only. If selected, removes any bookmarks in a PDF file. | Internal: Selected External: Selected |
| Delete built-in properties (Office) | Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number. | Internal: Selected External: Selected Content Risk: Selected |
| Delete comments (Office) | Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document. | Internal: Not selected External: Not selected Content Risk: Not selected |
| Delete custom properties (Office) | <p>Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document.</p> <p>Note: You can prevent certain custom properties from being cleaned, for example, DMS Doc ID Properties, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> | Internal: Selected External: Selected Content Risk: Selected |
| Delete custom XML parts (Word) | Microsoft Word only. If selected, removes custom XML parts (embedded XML data) from a document. | Invisible, No clean |
| Delete document reviewers (Word) | <p>Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed.</p> <p>Note: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.</p> | Internal: Selected External: Selected Content Risk: Selected |

| Parameter | Description | Default |
|--|---|---|
| Delete document variables (Word) | <p>Microsoft Word only. If selected, deletes all document variables.</p> <p>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.</p> <p>Variables can be viewed in Microsoft Word in the Visual Basic Editor.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete footers (Excel and PowerPoint) | Microsoft Excel and PowerPoint. If selected, removes any footers included in the sheet or slide. | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete footnotes (Word) | Microsoft Word only. If selected, removes any footnotes or endnotes included in the document. | <p>Internal: Not selected</p> <p>External: Not selected</p> <p>Content Risk: Not selected</p> |
| Delete headers (Excel and PowerPoint) | Microsoft Excel and PowerPoint. If selected, removes any headers included in the sheet or slide. | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete hidden slides (PowerPoint) | Microsoft PowerPoint only. If selected, 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. | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete hidden text (Word) | Microsoft Word only. If selected, removes all text that has been formatted as hidden. | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |

| Parameter | Description | Default |
|--|---|---|
| Delete links (Excel) | <p>Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links:</p> <p>Link to a cell in another Microsoft Excel document.</p> <p>Named link to a named reference in another Microsoft Excel document.</p> <p>Link to another document.</p> <p>OLE link that inserts another document as an icon.</p> <p>OLE link that inserts another document as text.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete macros (Word and Excel) | <p>Microsoft Word and Excel. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete markup annotations (PDF) | <p>PDF only. If selected, removes any markup in a PDF file.</p> <p>Markup is a tool used to make comments and annotations to PDF documents.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Note: You can prevent certain markup annotations from being cleaned, for example, Highlight annotations or Strike Out annotations, by selecting them in the Protection > Exclude Metadata category. Refer to page 28.</p> </div> | <p>Internal: Selected</p> <p>External: Selected</p> |
| Delete previous authors (Word) | <p>Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations.</p> <p>This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |

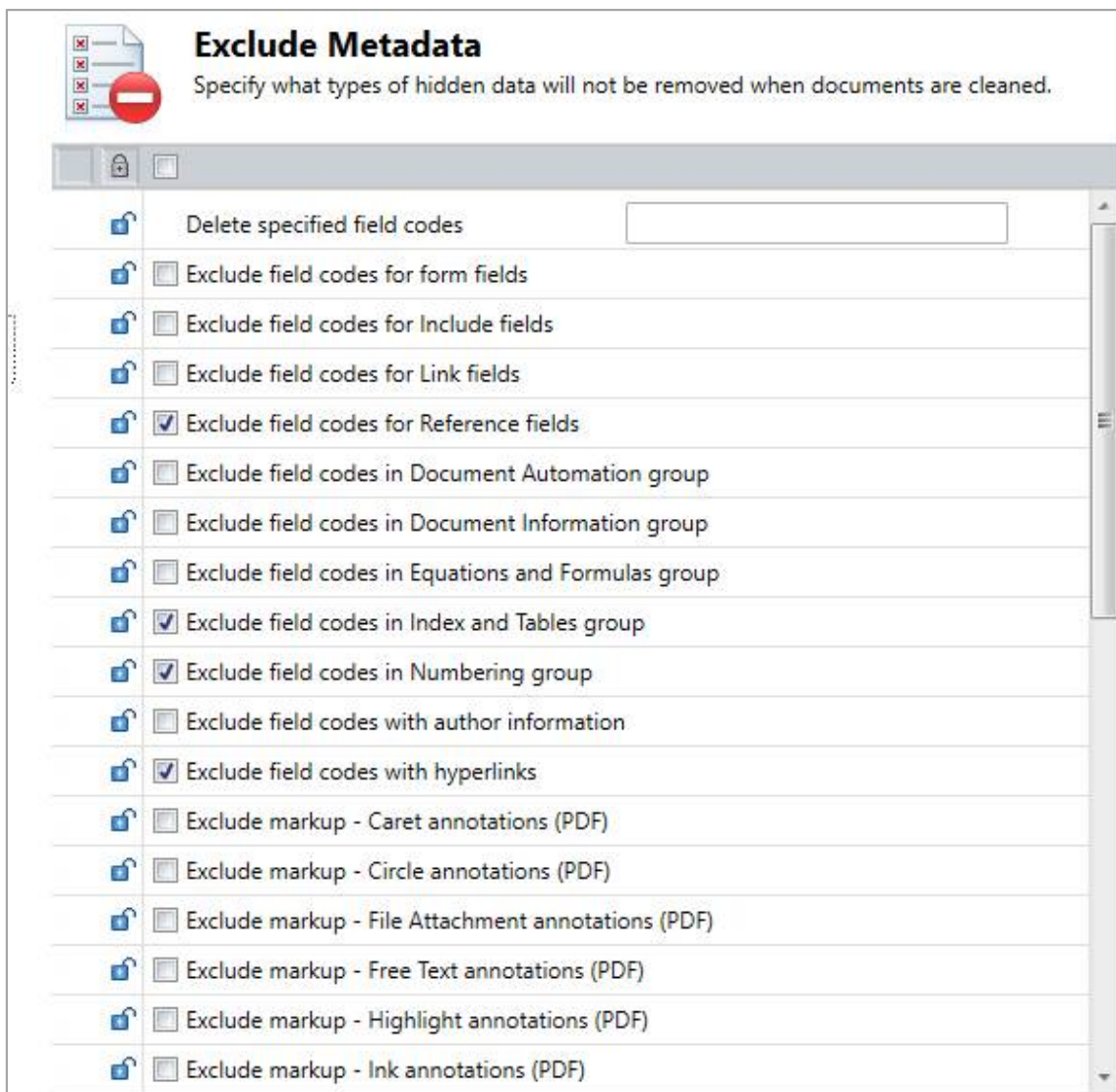
| Parameter | Description | Default |
|--|---|---|
| Delete properties (PDF) | <p>PDF only. If selected, removes properties in a PDF file.</p> <p>Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: Removing properties from a PDF/A file will disable its PDF/A status.</p> </div> | <p>Internal: Not selected</p> <p>External: Not selected</p> |
| Delete routing slip (Word and Excel 2003) | <p>Microsoft Word and Excel. If selected, 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.</p> <p>Routing slips are not supported in Microsoft Office 2007 and above.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete Smart Tags (Word 2003/2007) | <p>Microsoft Word only. If selected, removes smart tags from Microsoft Word documents.</p> <p>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.</p> <p>Smart tags only exist in Microsoft Office XP to 2010.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete Speaker Notes (PowerPoint) | <p>Microsoft PowerPoint only. If selected, 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.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete text smaller than 5pt (Word) | <p>Microsoft Word only. If selected, removes all text that has been formatted with a font size less than 5pt (i.e. 4pt and less).</p> | <p>Internal: Not selected</p> <p>External: Not selected</p> <p>Content Risk: Not selected</p> |

| Parameter | Description | Default |
|---|---|---|
| Delete versions (Word 2003) | <p>Microsoft Word only. If selected, 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.</p> <p>Document versions are not supported in Microsoft Word 2007 and above.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Delete white text on white background (Word) | <p>Microsoft Word only. Removes all text with a white font that has been formatted with a white background color.</p> | <p>Internal: Not selected</p> <p>External: Not selected</p> <p>Content Risk: Not selected</p> |
| Reset document statistics (Word) | <p>Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: This information cannot be cleaned from within Microsoft Word.</p> </div> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |
| Turn off versioning (Word 2003) | <p>Microsoft Word only. If selected, 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.</p> <p>Versioning is not supported in Microsoft Word 2007 and above.</p> | <p>Internal: Selected</p> <p>External: Selected</p> <p>Content Risk: Selected</p> |

Protection > Exclude Metadata

The **Protection > Exclude Metadata** parameters enable you to exclude certain types of metadata from being removed when documents are cleaned. The types of metadata that can be excluded from cleaning are custom properties and field codes from Office documents and markups from PDF files. When cleaning, the user can still select to clean these types of metadata and all custom properties, field codes or markups will be cleaned, except for the ones explicitly excluded here. These parameters apply when Workshare Protect is cleaning attachments as well as cleaning open Microsoft Office documents.

Note: When field codes are cleaned, the text is not removed. The field code is simply unlinked so that it is not updated in the future. For example, if you have a table of contents field code. Unlinking it keeps the table of contents in your document, but you are unable to update the table of contents, as it is no longer a field; it is only text.



Exclude Metadata
Specify what types of hidden data will not be removed when documents are cleaned.

Delete specified field codes

- ☐ Exclude field codes for form fields
- ☐ Exclude field codes for Include fields
- ☐ Exclude field codes for Link fields
- ☒ Exclude field codes for Reference fields
- ☐ Exclude field codes in Document Automation group
- ☐ Exclude field codes in Document Information group
- ☐ Exclude field codes in Equations and Formulas group
- ☒ Exclude field codes in Index and Tables group
- ☒ Exclude field codes in Numbering group
- ☐ Exclude field codes with author information
- ☒ Exclude field codes with hyperlinks
- ☐ Exclude markup - Caret annotations (PDF)
- ☐ Exclude markup - Circle annotations (PDF)
- ☐ Exclude markup - File Attachment annotations (PDF)
- ☐ Exclude markup - Free Text annotations (PDF)
- ☐ Exclude markup - Highlight annotations (PDF)
- ☐ Exclude markup - Ink annotations (PDF)

The **Protection > Exclude Metadata** parameters which apply to all cleaning (internal email, external email and open documents) are described in the following table:

| Parameter | Description | Default |
|---|--|--------------|
| Delete specified field codes | Microsoft Word only. Workshare Protect is configured to replace field codes with static text. However, by entering the field codes in this parameter, Workshare Protect will delete any instances of these field codes. To delete specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code, separate them with a semicolon. | |
| Exclude field codes for form fields | Microsoft Word only. These are field codes that are used in forms, for example, dropdown lists and text boxes. If selected, any form field codes are not cleaned. By default, these field codes are not excluded and therefore form fields are unlinked during cleaning. | Not Selected |
| Exclude field codes for Include fields | Microsoft Word only. These are field codes that include text or pictures from other sources. If selected, any 'include' field codes are not cleaned. By default, these field codes are not excluded and therefore 'include' fields are unlinked during cleaning. | Not selected |
| Exclude field codes for Link fields | Microsoft Word only. These are field codes for linked or imported objects. If selected, the links are not removed and therefore still update from the source. By default, these field codes are not excluded and therefore links are unlinked during cleaning. | Not selected |
| Exclude field codes for Reference fields | Microsoft Word only. These are field codes for any references within the document, for example, page references. If not selected, references are unlinked and therefore no longer automatically updated. By default, these field codes are excluded and therefore any references in your document remain fully functional. | Selected |

| Parameter | Description | Default |
|--|--|--------------|
| Exclude field codes in Document Automation group | <p>Microsoft Word only. These are field codes used to provide functions within a document, for example, macro buttons, mail merge functions, print functionality.</p> <p>If selected, these field codes remain linked which means the document automation features continue to work.</p> <p>By default these field codes are not excluded, and therefore document automation features are unlinked during cleaning.</p> | Not selected |
| Exclude field codes in Document Information group | <p>Microsoft Word only. These are field codes that reference any of the document properties, for example, subject and keywords, as well as any field codes that reference the document statistics, for example, create date and number of words.</p> <p>If selected, any field codes referencing the document properties or statistics are not cleaned.</p> <p>By default, these field codes are not excluded and therefore document information is unlinked during cleaning.</p> | Not selected |
| Exclude field codes in Equations and Formulas group | <p>Microsoft Word only. These are field codes for calculations, for example, equations, symbols or formula.</p> <p>If selected, equations remain linked.</p> <p>By default, these field codes are not excluded and therefore any equations are unlinked during cleaning.</p> | Not selected |
| Exclude field codes in Index and Tables group | <p>Microsoft Word only. These are field codes related to the Table of Contents, Table of Authorities, Glossary, and Index.</p> <p>If not selected, these tables are unlinked, and can therefore no longer be automatically updated.</p> <p>By default, these field codes are excluded and therefore tables and indexes in your document will remain fully functional.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: <i>Unlinking a table of contents causes the hyperlinks that reference each section of the document to stop working. It may also change the format of the table of contents to blue underlined text.</i></p> </div> | Selected |

| Parameter | Description | Default |
|--|--|--------------|
| Exclude field codes in Numbering group | <p>Microsoft Word only. These are field codes for numbering within the document, for example, page numbers, list numbers, section numbers.</p> <p>If not selected, these numbers are unlinked and therefore no longer automatically updated.</p> <p>By default, these field codes are excluded and therefore any numbering in your document remains fully functional.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p><i>Note: Unlinking page numbers in headers or footers may cause page numbers to be repeated if a header or footer is shared between more than one page of the document.</i></p> </div> | Selected |
| Exclude field codes with author information | <p>Microsoft Word only. These are field codes that include the Author, Last Saved By User, or Current User information.</p> <p>If selected, any field codes referencing the author or user are not cleaned.</p> <p>By default, these field codes are not excluded and therefore author information is unlinked during cleaning.</p> | Not selected |
| Exclude field codes with hyperlinks | <p>Microsoft Word, Excel and PowerPoint. These are field codes for hyperlinks.</p> <p>If not selected, hyperlinks are unlinked. The text of the link is still visible but the associated address is removed.</p> <p>By default, these field codes are excluded and therefore hyperlinks in your document remain fully functional.</p> | Selected |
| Exclude markup – Caret annotations | <p>PDF only. Caret annotations are a type of markup used in PDF files.</p> <p>If selected, any caret annotations in PDF files are not cleaned.</p> <p>By default, caret annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |

| Parameter | Description | Default |
|---|---|--------------|
| Exclude markup – Circle annotations | <p>PDF only. Circle annotations are a type of markup used in PDF files.</p> <p>If selected, any circle annotations in PDF files are not cleaned.</p> <p>By default, circle annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – File Attachment annotations | <p>PDF only. File attachment annotations are a type of markup used in PDF files.</p> <p>If selected, any file attachment annotations in PDF files are not cleaned.</p> <p>By default, file attachment annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Free Text annotations | <p>PDF only. Free text annotations are a type of markup used in PDF files.</p> <p>If selected, any free text annotations in PDF files are not cleaned.</p> <p>By default, free text annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Highlight annotations | <p>PDF only. Highlight annotations are a type of markup used in PDF files.</p> <p>If selected, any highlight annotations in PDF files are not cleaned.</p> <p>By default, highlight annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Ink annotations | <p>PDF only. Ink annotations are a type of markup used in PDF files.</p> <p>If selected, any ink annotations in PDF files are not cleaned.</p> <p>By default, ink annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |

| Parameter | Description | Default |
|---|---|--------------|
| Exclude markup – Line annotations | <p>PDF only. Line annotations are a type of markup used in PDF files.</p> <p>If selected, any line annotations in PDF files are not cleaned.</p> <p>By default, line annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Links annotations | <p>PDF only. Links annotations are a type of markup used in PDF files.</p> <p>If selected, any links annotations in PDF files are not cleaned.</p> <p>By default, links annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Movie and Sound annotations | <p>PDF only. Movie and sound annotations are a type of markup used in PDF files.</p> <p>If selected, any movie and sound annotations in PDF files are not cleaned.</p> <p>By default, movie and sound annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Polygon annotations | <p>PDF only. Polygon annotations are a type of markup used in PDF files.</p> <p>If selected, any polygon annotations in PDF files are not cleaned.</p> <p>By default, polygon annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Polyline annotations | <p>PDF only. Polyline annotations are a type of markup used in PDF files.</p> <p>If selected, any polyline annotations in PDF files are not cleaned.</p> <p>By default, polyline annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |

| Parameter | Description | Default |
|---|---|--------------|
| Exclude markup – Popup annotations | <p>PDF only. Popup annotations are a type of markup used in PDF files.</p> <p>If selected, any popup annotations in PDF files are not cleaned.</p> <p>By default, popup annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Redaction annotations | <p>PDF only. Redaction annotations are a type of markup used in PDF files.</p> <p>If selected, any redaction annotations in PDF files are not cleaned.</p> <p>By default, redaction annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Screen annotations | <p>PDF only. Screen annotations are a type of markup used in PDF files.</p> <p>If selected, any screen annotations in PDF files are not cleaned.</p> <p>By default, screen annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Square annotations | <p>PDF only. Square annotations are a type of markup used in PDF files.</p> <p>If selected, any square annotations in PDF files are not cleaned.</p> <p>By default, square annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Squiggly annotations | <p>PDF only. Squiggly annotations are a type of markup used in PDF files.</p> <p>If selected, any squiggly annotations in PDF files are not cleaned.</p> <p>By default, squiggly annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |

| Parameter | Description | Default |
|--|--|--------------|
| Exclude markup – Stamps annotations | <p>PDF only. Stamps annotations are a type of markup used in PDF files.</p> <p>If selected, any stamps annotations in PDF files are not cleaned.</p> <p>By default, stamps annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Strike Out annotations | <p>PDF only. Strike out annotations are a type of markup used in PDF files.</p> <p>If selected, any strike out annotations in PDF files are not cleaned.</p> <p>By default, strike out annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Text annotations | <p>PDF only. Text annotations are a type of markup used in PDF files.</p> <p>If selected, any text annotations in PDF files are not cleaned.</p> <p>By default, text annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Underline annotations | <p>PDF only. Underline annotations are a type of markup used in PDF files.</p> <p>If selected, any underline annotations in PDF files are not cleaned.</p> <p>By default, underline annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |
| Exclude markup – Widgets annotations | <p>PDF only. Widgets annotations are a type of markup used in PDF files.</p> <p>If selected, any widgets annotations in PDF files are not cleaned.</p> <p>By default, widgets annotations are not excluded and therefore will be removed if you have selected to clean markup from PDF files.</p> | Not selected |

| Parameter | Description | Default |
|---|---|----------|
| Exclude referenced documents (Lightspeed Clean only) | <p>Microsoft Word only. These are field codes that identify a file to include when you create a table of contents or an index with the TOC, TOA, or Index field.</p> <p>If selected, any Referenced Document (RD) field codes are not cleaned.</p> <p>By default, these field codes are excluded and therefore any RD fields in your document remain fully functional.</p> | Selected |
| Exclude specified custom properties | <p>Microsoft Word, Excel and PowerPoint. If you have selected to clean custom properties but there are custom properties in your documents that you never want to remove, for example, DMS DocIds, you can exclude them from both cleaning and discovery. To exclude custom properties, add the names of the custom properties to this parameter. If you want to specify more than one custom property, separate them with a semicolon.</p> | |
| Exclude specified document variables | <p>Microsoft Word only. If you have selected to clean document variables but there are document variables in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude document variables, add the names of the document variable to this parameter. If you want to specify more than one document variable, separate them with a semicolon.</p> | |
| Exclude specified field codes | <p>Microsoft Word only. If you have selected to clean field codes but there are field codes in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code, separate them with a semicolon.</p> | |

Protection > Convert to PDF

The **Protection > Convert to PDF** parameters enable you to specify whether Workshare Protect should convert attachments to PDF as well as set the default security settings applied when Workshare Protect performs conversion to PDF.

Convert to PDF
Specify when and how to convert email attachments to PDF files.

| | Internal Email | External Email |
|---|--------------------------|--------------------------|
| Convert attachments to PDF | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Clean before PDF | | |
| <input type="checkbox"/> Default password to apply PDF security | <input type="password"/> | |
| <input type="checkbox"/> Default password to open PDF | <input type="password"/> | |
| <input type="checkbox"/> Enable PostScript simulation | | |
| <input checked="" type="checkbox"/> Multilingual Support | | |
| <input type="checkbox"/> Prohibit comments being added | | |
| <input type="checkbox"/> Prohibit modification of text | | |
| <input type="checkbox"/> Prohibit printing | | |
| <input type="checkbox"/> Prohibit text or graphics being copied | | |
| <input type="checkbox"/> Reconstruct HyperLinks | | |
| <input type="checkbox"/> Set PDF/A as default pdf format | | |

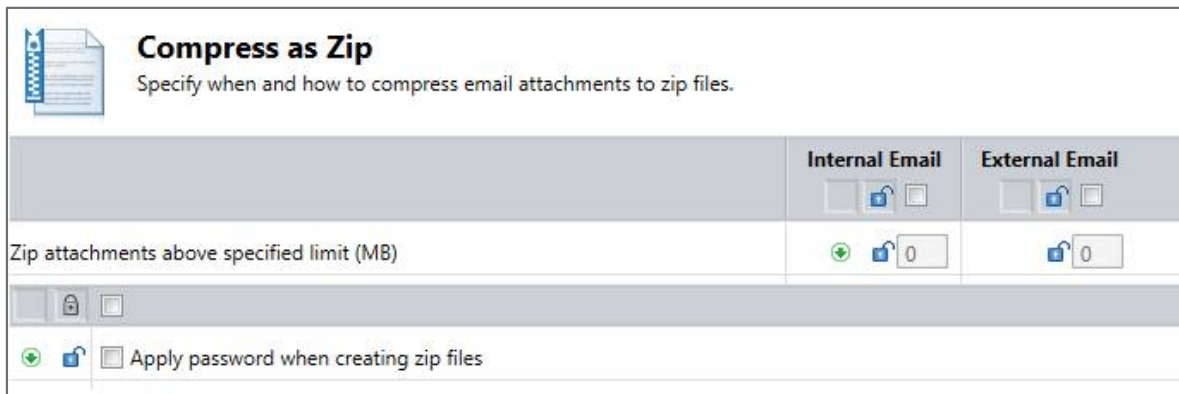
The **Protection > Convert to PDF** parameters are described in the following table:

| Parameter | Description | Default |
|-----------------------------------|--|--|
| Convert attachments to PDF | If selected, Microsoft Office documents attached to the email are automatically converted to PDFs when the email is sent. | Internal: Not selected External: Not selected |
| Clean before PDF | If selected, documents are cleaned before they are converted to PDF according to the parameters selected in Protection > Remove Metadata (Content Risk column) . | Not selected |

| Parameter | Description | Default |
|---|---|------------------------------------|
| Default password to apply PDF security | Administrator Mode Only. The default password required to access PDF security options or to access PDF files when security options are applied. | Contact Workshare Customer Support |
| Default password to open PDF | The default password required to open PDF files after conversion by Workshare Protect. | |
| Enable PostScript simulation | If selected, the PostScript simulation option in the printer driver is turned on. This option is relevant when converting documents to PDF that include WordArt and semi-transparent backgrounds. | Not selected |
| Multilingual Support | If selected, when converting to PDF, Workshare embeds the documents' fonts inside the PDF file. This means a PDF file can always be read even on machines that do not have the fonts of the document. Embedding the fonts into the PDF file will make the PDF file bigger. | Selected |
| Prohibit comments being added | If selected, the Prevent comments being added checkbox in the <i>PDF Security Settings</i> dialog is selected by default. | Not selected |
| Prohibit modification of text | If selected, the Prevent editing of text checkbox in the <i>PDF Security Settings</i> dialog is selected by default. | Not selected |
| Prohibit printing | If selected, the Prevent printing checkbox in the <i>PDF Security Settings</i> dialog is selected by default. | Not selected |
| Prohibit text or graphics being copied | If selected, the Prevent the copying of text and/or graphics checkbox in the <i>PDF Security Settings</i> dialog is selected by default. | Not selected |
| Reconstruct Hyperlinks | <p>If selected, standard URL and bookmark hyperlinks are preserved when converting to PDF.</p> <div> <p>Note: Selecting the Reconstruct Hyperlinks parameter 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.</p> </div> | Not selected |
| Set PDF/A as default PDF format | If selected, the PDF/A option is selected as the default when converting to PDF. | Not selected |

Protection > Compress as Zip

The **Protection > Compress as Zip** parameters enable you to specify whether Workshare Protect should compress attachments into zip files and how it performs this functionality.



Compress as Zip
Specify when and how to compress email attachments to zip files.

| | Internal Email | External Email |
|--|---|---|
| Zip attachments above specified limit (MB) | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
| | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |


☒ ☒ Apply password when creating zip files

The **Protection > Compress as Zip** parameters are described in the following table:

| Parameter | Description | Default |
|---|--|----------------------------|
| Zip attachments above specified limit (MB) | The size limit for zipping attachments. If this option is not selected and the text box left blank, no zipping is done. If this option is selected and set to 0, attachments are always zipped (unless they are already zipped). You can also set the value in the text box to a particular size, for example, 2. In this case zipping only occurs if attachments are larger than 2MB. Workshare Protect zips Microsoft Word, Excel and PowerPoint files as well as PDF and RTF files. Each attachment that meets the specified limit is zipped individually and attached to the email instead of the unzipped file. | Internal: 0 External: 0 |
| Apply password when creating zip files | If selected, users are prompted to enter a password whenever attachments are automatically zipped. This option is used in conjunction with the automatic zip options. When this setting is not selected, zip files are not password-protected. | Not selected |

Comparison > Administration

The **Comparison > Administration** parameters enable you to specify how Workshare Compare functions in specific situations.



Administration

Configure how documents are displayed in Workshare Compare as well as how Workshare Compare functions in specified situations.

| | | |
|--|---|--|
| | Additional locations for rendering sets | <input type="text"/> |
| | <input checked="" type="checkbox"/> Allow users to change email attachment format | |
| | Apply Accepted Changes default save location | <input type="text"/> |
| | Default document open location | <input type="text"/> |
| | Default email attachment format | Portable Document Format (.pdf) ▼ |
| | Default location rendering set | %USERPROFILE%\Documents\Workshare\Render |
| | Default Redline save location | <input type="text"/> |
| | Default rendering set | <input type="text"/> |
| | <input type="checkbox"/> Display document description as well as document ID | |
| | <input checked="" type="checkbox"/> Display document selection dialog on startup | |
| | <input checked="" type="checkbox"/> Display Redline in page layout view | |
| | <input checked="" type="checkbox"/> Display source document labels | |
| | <input type="checkbox"/> Display source documents in page layout view | |
| | <input checked="" type="checkbox"/> Display table gridlines | |
| | Drives without Windows file sharing | <input type="text"/> |
| | <input checked="" type="checkbox"/> Enable fast comparison | |
| | <input type="checkbox"/> Enable reduced Redline | |
| | <input checked="" type="checkbox"/> Highlight changes in Redline on navigation | |
| | <input type="checkbox"/> Launch new comparison in running instance | |
| | Number of characters shown around a change in reduced Redline | 200 |
| | <input type="checkbox"/> Only print pages with changes | |

The **Comparison > Administration** parameters are described in the following table:

| Parameter | Description | Default |
|--|--|---|
| Additional locations for rendering sets | Workshare Compare looks in the following two locations to create a list of the possible rendering sets available: %PUBLIC%\Documents\Workshare\Rendering (default public location) %USERPROFILE%\Documents\Workshare\Rendering (default user location). This may be different if the administrator has specified a new default user location for the Default rendering set location parameter. To specify other locations, for example, on your network, enter the location in this field. Separate multiple locations with a semicolon. | |
| Allow users to change email attachment format | Administrator Mode only. If selected, the user can select from different formats for the Redline document when sending a Redline by email. | Selected |
| Apply Accepted Changes default save location | The default save location of the new Word document that opens with your selected changes accepted, when you click the Apply Accepted Changes button in Workshare Compare. | |
| Default document open location | The default location when opening saved comparisons using the Open option in Workshare Compare. | |
| Default email attachment format | The default format for the Redline document when sending a Redline by email (DOC, DOCX, TEXT, RTF, WDF or PDF). | Portable Document Format (.pdf) |
| Default location rendering set | Administrator Mode Only. The default user location where rendering sets are saved. | %USERPROFILE%\Documents\Workshare\Rendering |
| Default Redline save location | The default location where Redline documents are saved. | |
| Default rendering set | The default rendering set to be applied to comparisons. If no default is specified, Workshare Compare uses the most recently used rendering set as the default. | |

| Parameter | Description | Default |
|--|---|--------------|
| Display document description as well as document ID | If selected, DMS document descriptions are displayed in the Workshare Compare comparison window, where usually it would display document IDs. A DMS document ID is in the form file://c/mydocument.doc , whereas the description is more user friendly, for example, mydocument.doc . This applies to local file store as well as all other DMS integrations. Additionally, if selected, the most recently used list displays the more user friendly document description when a user is picking recent documents for a Workshare Compare comparison. | Not selected |
| Display document selection dialog on startup | If selected, the <i>Compare Documents</i> dialog is displayed automatically when Workshare Compare is launched. | Selected |
| Display Redline in page layout view | If selected, the Redline document is displayed in page layout view. | Selected |
| Display source document labels | If selected, the names of the original and modified documents are displayed above them in the Source Documents window. | Selected |
| Display source documents in page layout view | If selected, the original and modified documents are displayed in page layout view in the Source Documents window. | Not selected |
| Display table gridlines | If selected, table gridlines are displayed in the Redline document and source documents. | Selected |
| Drives without Windows file sharing | If you are running OpenText NFS to map drives, the drive letters to which to save Redline documents. | |

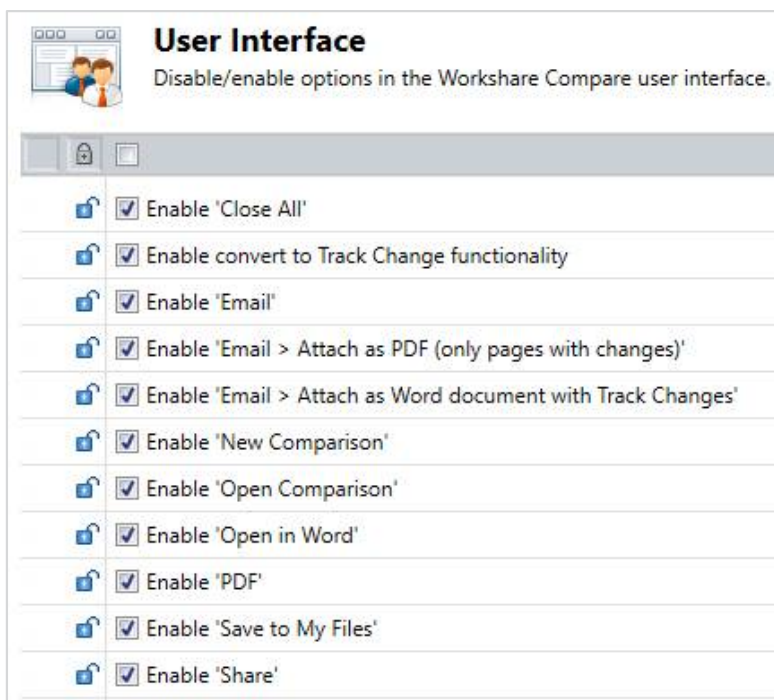
| Parameter | Description | Default |
|--|---|--------------|
| Enable fast comparison | <p>If selected, the Fast comparison mode is available when comparing DOC and DOCX files. Using the Fast mode, Workshare Compare reads a document at a binary level and converts it to RTF format (faster than Microsoft Word in Standard mode) and therefore completes the comparison more quickly.</p> <p>If you are experiencing issues with the document comparison, your Technical Support representative may request that you disable this option. Otherwise, it is not recommended to change this setting.</p> | Selected |
| Enable reduced Redline | If selected, the Redline document displays changes with limited surrounding text. | Not selected |
| Highlight changes in Redline on navigation | If selected, the changes made to the original document are highlighted in the Redline document when you navigate to them. For example, by selecting a change in the Change Summary window. | Selected |
| Launch new comparison in running instance | If selected, launching another comparison, when one is already open in Workshare Compare, will display the new comparison in a new tab in the same instance of Workshare Compare. | Not selected |
| Number of characters shown around a change in reduced Redline | When a reduced Redline document is produced, this setting defines the number of characters that are displayed surrounding a change. By default, the number of surrounding characters is 200; the minimum number of surrounding characters is 70. | 200 |
| Only print pages with changes | If selected, the Only print pages with changes checkbox in the <i>Print</i> dialog is selected by default. This option specifies that only the pages in Redline documents that include changes are printed. | Not selected |
| Print Redline in black and white | If selected, the Print Redline in black and white checkbox in the <i>Print</i> dialog is selected by default. This option specifies that Redline documents are printed in monochrome (black and white). | Not selected |

| Parameter | Description | Default |
|--|---|--|
| Prompt to save Redline after a comparison | If selected, the Redline document is automatically saved after each comparison. | Not selected |
| Prompt to save Redline on close | If selected, when closing Workshare Compare, a message is displayed prompting the user to save the Redline document. | Selected |
| Send Redline email body | The text included in the body of the email when sending a Redline by email. The {ATTACHMENTS} tag means that the names of the attachments are included below the text. Remove this tag if you do not want the attachment names to appear. | The following files have been attached to this mail by Workshare 9.5...{ATTACHMENTS} |
| Send Redline email subject | The text displayed in the Subject field when sending a Redline by email. | Workshare 9.5 Document Distribution |
| Synchronize documents on navigation | If selected, the views of the original, modified and Redline documents scroll to the same point when you click a paragraph in any of the documents. | Selected |
| Synchronize multiple Redlines on navigation | If selected, when an original document has been compared against multiple modified documents, then the views of each Redline document (in their individual tabs) scroll to the same approximate point when you click a paragraph in any of the Redline documents. | Selected |
| Use current instance of Word | If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from outside Microsoft Word use an existing winword.exe process. | Not selected |
| Use current instance of Word when comparing | If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from within Microsoft Word use an existing winword.exe process. | Not selected |

| Parameter | Description | Default |
|--|--|--------------|
| Use Redline name as email subject | If selected, the document name of the Redline document is used in the Subject field when sending a Redline by email. This setting will override any setting specified in the Send Redline email subject parameter. | Not selected |
| Zoom (%) | The magnification of the source documents and the Redline document as they appear in the Workshare Compare main window. | 100 |

Comparison > User Interface

The **Comparison > User Interface** parameters enable you to customize the Workshare Compare user interface and set what options will be available.



The **Comparison > User Interface** parameters are described in the following table:

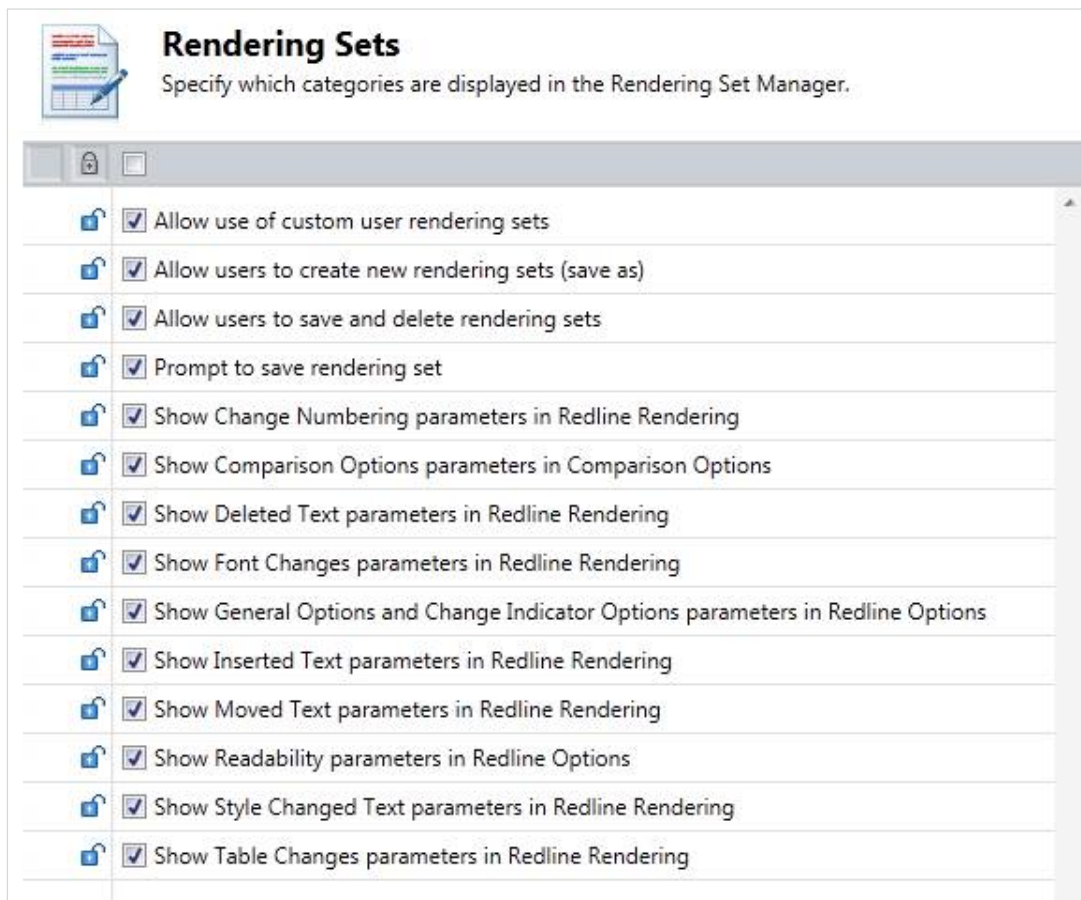
| Parameter | Description | Default |
|---------------------------|--|----------|
| Enable 'Close All' | If selected, enables the Close All option in Workshare Compare. The user is able to close all open Redline documents. | Selected |

| Parameter | Description | Default |
|---|--|----------|
| Enable convert to Track Change functionality | If selected, the convert to track change functionality is available. This functionality enables you to save, share or open the Redline as a document with the changes shown as track changes. | Selected |
| Enable 'Email' | If selected, enables the Email option in Workshare Compare. The user is able to send the Redline and source documents by email. | Selected |
| Enable 'Email > Attach as PDF (only pages with changes)' | If selected, the Email > Attach as PDF (only pages with changes) option is available in Workshare Compare. This option enables you to email only the pages from the Redline that include changes. | Selected |
| Enable 'Email > Attach as Word document with Track Changes' | If selected, the Email > Attach as Word document with Track Changes option is available in Workshare Compare. This option enables you to convert the Redline to a document with the changes shown as track changes and email it. | Selected |
| Enable 'New Comparison' | If selected, enables the New Comparison option in Workshare Compare. The user is able to perform a new comparison. | Selected |
| Enable 'Open Comparison' | If selected, enables the Open Comparison option in Workshare Compare. The user is able to open a saved comparison (WDF). | Selected |
| Enable 'Open in Word' | <p>If selected, enables the Word > Open in Word option in Workshare Compare. The user is able to edit the Redline document in their chosen word processor. The word processor must be configured to open rich text format files (.rtf).</p> <p><i>Note: If the user does this, the Redline document is no longer an accurate reflection of the changes between the original and modified documents.</i></p> | Selected |
| Enable 'PDF' | If selected, enables the PDF option in Workshare Compare. The user is able to convert the Redline to PDF. | Selected |

| Parameter | Description | Default |
|----------------------------------|---|----------|
| Enable 'Save to My Files' | If selected, enables the Save to My Files option in Workshare Compare. The user is able to save a Redline document to Workshare online. | Selected |
| Enable 'Share' | If selected, enables the Share option in Workshare Compare. The user is able to share and collaborate on a Redline document in Workshare online. | Selected |

Comparison > Rendering Sets

The **Comparison > Rendering Sets** parameters enable you to configure the Workshare Compare rendering set functionality as well as set what rendering set options will be available.



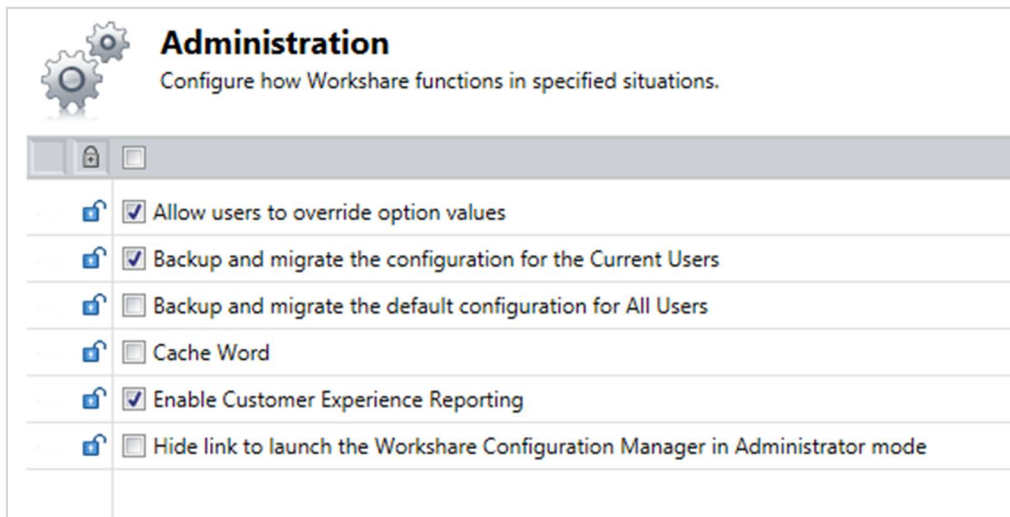
The **Comparison > Rendering Sets** parameters are described in the following table:

| Parameter | Description | Default |
|---|--|----------|
| Allow use of custom user rendering sets | Administrator Mode only. If selected, Workshare Compare includes the rendering sets in the personal rendering sets location (C: Users > (user name) > My Documents > Workshare > Rendering) when populating the list of possible rendering sets available. | Selected |
| Allow users to create new rendering sets (save as) | Administrator Mode only. If selected, the user can create new rendering sets using the Save As button in the Rendering Set Manager. | Selected |
| Allow users to save and delete rendering sets | Administrator Mode only. If selected, the user can save and delete rendering sets using the Save and Delete buttons in the Rendering Set Manager. | Selected |
| Prompt to save rendering set | If selected, when a user is creating their own rendering set, they are prompted to save their changes under a different name. | Selected |
| Show Change Numbering parameters in Redline Rendering | If selected, the Change Numbering parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to switch change numbering on and off in the Redline document and change how change numbering is displayed. | Selected |
| Show Comparison Options parameters in Comparison Options | If selected, the Comparison Options parameters in the Comparison Options category of the Rendering Set Manager are available to the user enabling the user to change the options used when comparing documents. | Selected |
| Show Deleted Text parameters in Redline Rendering | If selected, the Deleted Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how deleted text is displayed in the Redline document. | Selected |

| Parameter | Description | Default |
|--|--|----------|
| Show Font Changes parameters in Redline Rendering | If selected, the Font Changes parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how font changes are displayed in the Redline document. | Selected |
| Show General Options and Change Indicator Options parameters in Redline Options | If selected, the General Options and Change Indicator Options parameters in the Redline Options category of the Rendering Set Manager are available to the user enabling the user to change how the Redline document is displayed and what information is included with the Redline document. | Selected |
| Show Inserted Text parameters in Redline Rendering | If selected, the Inserted Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how inserted text appears in the Redline document. | Selected |
| Show Moved Text parameters in Redline Rendering | If selected, the Moved Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how moved text is displayed in the Redline document. | Selected |
| Show Readability parameters in Redline Options | If selected, the Readability parameters in the Redline Options category of the Rendering Set Manager are available to the user enabling the user to change readability options in the Redline document. | Selected |
| Show Style Changed Text parameters in Redline Rendering | If selected, the Style Changed Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to determine how changes to styles are displayed in the Redline document. | Selected |
| Show Table Changes parameters in Redline Rendering | If selected, the Table Changes parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to set the options for how changes to table cells appear in the Redline document. | Selected |

General > Administration

The **General > Administration** parameters enable you to specify how Workshare functions in some specific situations.




The **General > Administration** parameters are described in the following table:

| Parameter | Description | Default |
|---|--|--------------|
| Allow users to override option values | Administrator Mode only. If selected, users can override the values for parameters in the Workshare Configuration Manager unless individual parameters have been locked. | Selected |
| Backup and migrate the configuration for the Current Users | If selected, when you are upgrading from an earlier version of Workshare all existing user settings and options are transferred to the Workshare 8 installation. | Selected |
| Backup and migrate the default configuration for All Users | Administrator Mode only. If selected, when you are upgrading from an earlier version of Workshare all existing public settings and options are transferred to the Workshare 8 installation. | Not selected |

| Parameter | Description | Default |
|--|--|--------------|
| Cache Word | <p>If selected, an instance of Microsoft Word is kept in memory when Workshare is in use. This can save time when performing certain operations. If not selected, an instance of Microsoft Word is started and stopped on demand.</p> <p><i>Note: When Microsoft Word starts up invisibly (when Cache Word is selected), it does not initialize its add-ins. If the user then does something to make the instance of Microsoft Word visible (for example, initiates editing a document) then the user will be working with no add-ins initialized.</i></p> | Not selected |
| Enable Customer Experience Reporting | <p>Administrator Mode only.</p> <p>If selected, Workshare gathers anonymous usage statistics and environment information used towards product evolution and improvement.</p> | Selected |
| Hide link to launch the Workshare Configuration Manager in Administrator mode | <p>Administrator Mode only.</p> <p>If selected, there will be no link to Launch Administrator Mode in the User mode of the Workshare Configuration Manager.</p> | Not selected |



General > User Interface







The **General > User Interface** parameters enable you to customize the Workshare user interface and set what options will be available in the Workshare ribbon/menu.



User Interface

Specify how the Workshare user interface is displayed/Disable/enable options in the Workshare user interface.

☐  ☐ 

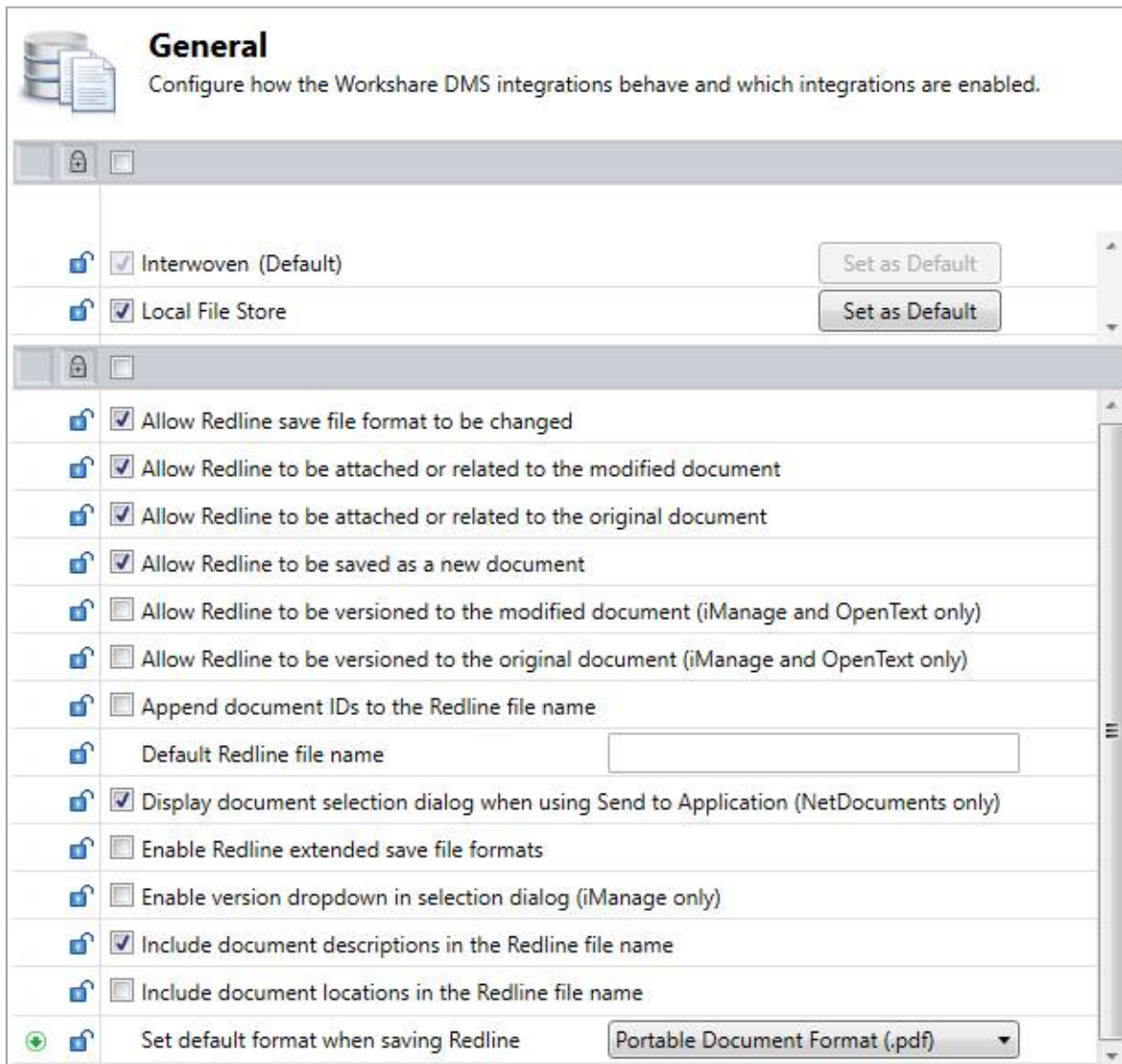
| | |
|---|--|
|  | <input checked="" type="checkbox"/> Enable Combine PDF |
|  | <input checked="" type="checkbox"/> Enable Compare |
|  | <input checked="" type="checkbox"/> Enable Content Risk |
|  | <input checked="" type="checkbox"/> Enable Convert to PDF |
|  | <input checked="" type="checkbox"/> Enable Selective Compare |
|  | <input type="checkbox"/> Hide options user cannot change |

The **General > User Interface** parameters are described in the following table:

| Parameter | Description | Default |
|--|--|--------------|
| Enable Combine PDF | If selected, the Combine PDF option is enabled in the Workshare tab. | Selected |
| Enable Compare | If selected, the Compare option is enabled in the Workshare tab. | Selected |
| Enable Content Risk | If selected, the Content Risk option is enabled in the Workshare tab. | Selected |
| Enable Convert to PDF | If selected, the Convert to PDF option is enabled in the Workshare tab. | Selected |
| Enable Selective Compare | If selected, the Selective Compare option is enabled in the Workshare tab. | Selected |
| Hide options user cannot change | If selected, the parameters that the administrator has locked so that users cannot change are hidden from the user in User Mode. | Not selected |

Integrations > General

The **Integrations > General** category is where you select the default document provider with which Workshare integrates as well as set parameters general to all DMS integrations.



General
Configure how the Workshare DMS integrations behave and which integrations are enabled.

☐ ☒ **Interwoven (Default)** Set as Default

☐ ☒ **Local File Store** Set as Default

☐ ☒ **Allow Redline save file format to be changed**

☐ ☒ **Allow Redline to be attached or related to the modified document**

☐ ☒ **Allow Redline to be attached or related to the original document**

☐ ☒ **Allow Redline to be saved as a new document**

☐ ☐ **Allow Redline to be versioned to the modified document (iManage and OpenText only)**

☐ ☐ **Allow Redline to be versioned to the original document (iManage and OpenText only)**

☐ ☐ **Append document IDs to the Redline file name**

☐ **Default Redline file name**

☐ ☒ **Display document selection dialog when using Send to Application (NetDocuments only)**

☐ ☐ **Enable Redline extended save file formats**

☐ ☐ **Enable version dropdown in selection dialog (iManage only)**

☐ ☒ **Include document descriptions in the Redline file name**

☐ ☐ **Include document locations in the Redline file name**

☒ ☐ **Set default format when saving Redline** Portable Document Format (.pdf)

In the top section of the right pane, you can see the document providers with which Workshare integrates. **Local File Store** is always available and **Workshare SharePoint Connector**, **iManage**, **OpenText**, **NetDocuments** and **Worldox** are available if you have the relevant Workshare integration installed and your Workshare license includes the relevant integration.

You specify the default document source by clicking the **Set as Default** button to the right of the required document provider.

The **Integrations > General** parameters are described in the following table:

| Parameter | Description | Default |
|---|--|--------------|
| Allow Redline save file format to be changed | If selected, the file format can be changed when saving the Redline document. | Selected |
| Allow Redline to be attached or related to the modified document | If selected and when using OpenText, the Redline document can be saved as an attachment to the modified document. When using iManage, the Redline document can be saved as a related document to the modified document. | Selected |
| Allow Redline to be attached or related to the original document | If selected and when using OpenText, the Redline document can be saved as an attachment to the original document. When using iManage, the Redline document can be saved as a related document to the original document. | Selected |
| Allow Redline to be saved as a new document | If selected, the Redline document can be saved as a new document. | Selected |
| Allow Redline to be versioned to the modified document (iManage and OpenText only) | If selected and when using OpenText or iManage, the Redline document can be versioned to the modified document. | Not selected |
| Allow Redline to be versioned to the original document (iManage and OpenText only) | If selected and when using OpenText or iManage, the Redline document can be versioned to the original document. | Not selected |
| Append document IDs to the Redline file name | If selected, the document ID or number is used as the default name for a Redline document when it is saved. | Not selected |

| Parameter | Description | Default |
|---|--|--------------|
| Default Redline file name | <p>The name added to the Redline document when it is saved.</p> <p>When using any of the following functionality, the setting specified here will be added to the default Redline name. For example: [Default Redline file name]_[name of original document]-[name of modified document].</p> <ul style="list-style-type: none"> • Word > Open in Word • Word > Open in Word with Track Changes • Save As > Comparison document • Save As > Word document with Track Changes • Email > Attach as Word document with Track Changes • Email > Attach as PDF • Email > Attach as PDF (only pages with changes) • Email > More email options | |
| Display document selection dialog when using Send to Application (NetDocuments only) | If selected, Workshare's <i>Compare Documents</i> dialog is displayed when using NetDocuments' Send to Application. This enables the user to further define their comparison – they can switch original and modified, add further documents to compare, change the rendering set and use the Fast comparison mode. | Selected |
| Enable Redline extended save file formats | If selected, the user can choose a file format that is support by Microsoft Word when saving Redline documents. | Not selected |
| Enable version dropdown in selection dialog (iManage only) | If selected, the user can choose versions of an iManage document from the recent files dropdown in the document selection dialog. When a document doesn't have versions, the dropdown will show only recent files. | Not selected |
| Include document descriptions in the Redline file name | If selected, the document description is included in the name for a Redline document when it is saved. | Selected |
| Include document locations in the Redline file name | If selected, the document location is included in the name for a Redline document when it is saved. | Not selected |

| Parameter | Description | Default |
|---|---|---------------------------------|
| Set default format when saving Redline | The default format for the Redline document when saving a Redline (WDF, RTF, DOC, DOCX, TEXT or PDF). | Portable Document Format (.pdf) |

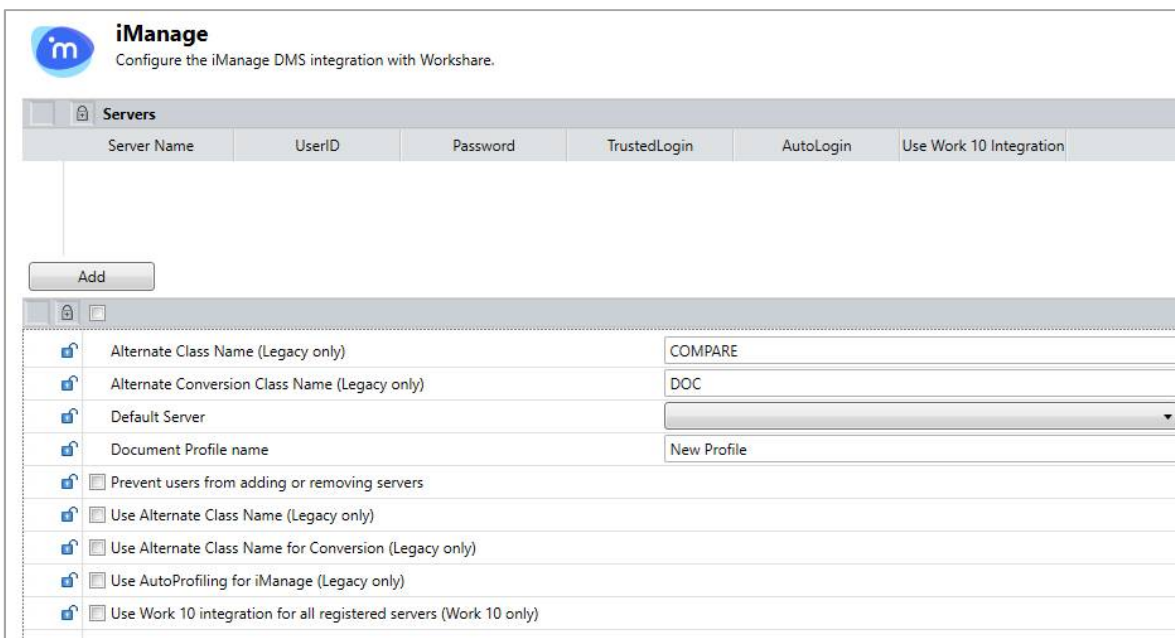
Integrations > iManage

The **Integrations > iManage** category is where you can add details of your iManage server as well as set specific parameters determining how Workshare interacts with iManage.

In User Mode, the **Integrations > iManage** category is available for iManage license holders only.

***Note:** In order for this category to be available, you must ensure your Workshare license includes the iManage integration.*

In Administrator Mode, the **Integrations > iManage** category is always available.



iManage
Configure the iManage DMS integration with Workshare.

Servers

| Server Name | UserID | Password | TrustedLogin | AutoLogin | Use Work 10 Integration |
|------------------------------------|--------|----------|--------------|-----------|-------------------------|
| <input type="button" value="Add"/> | | | | | |

Configuration Options:

- ☒ Alternate Class Name (Legacy only): COMPARE
- ☒ Alternate Conversion Class Name (Legacy only): DOC
- ☒ Default Server: [Dropdown Menu]
- ☒ Document Profile name: New Profile
- ☐ Prevent users from adding or removing servers
- ☐ Use Alternate Class Name (Legacy only)
- ☐ Use Alternate Class Name for Conversion (Legacy only)
- ☐ Use AutoProfiling for iManage (Legacy only)
- ☐ Use Work 10 integration for all registered servers (Work 10 only)

The list of configured iManage servers is displayed in the **Servers** section of the right pane. You can add an iManage server as required.

To add an iManage server:

1. In the **Integrations > iManage** category, click **Add**. An entry is added to the list of iManage servers in the **Servers** section.

| Server Name | UserID | Password | TrustedLogin | AutoLogin | Use Work 10 Integration |
|----------------------|----------------------|----------------------|--------------------------|--------------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2. In the **Server Name** field, enter the name of your iManage server.
3. In the **UserID** and **Password** fields, enter the user login details that enable login to the specified server. If you connect to your iManage server using your Windows account, select the **TrustedLogin** checkbox only.
4. Select the **AutoLogin** checkbox to automatically connect to the server and authenticate the user at startup. If you do not select this checkbox, the server can be registered but will not be authenticated at startup. This may be useful in a multi-server environment when you want to save the overhead of authenticating all the servers at startup.

Note: If a document ID is passed to a Workshare product for a document on a server for which it has details (a registered server) but to which it is not connected, then the Workshare product will automatically connect to that referenced server.

5. When both your server and clients are Work 10, select the **Use Work 10 Integration** checkbox.

Note: If you have any legacy iManage setup, for example, a Work 10 server and FileSite/DeskSite clients, do not select this option.

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

To delete a server from the list, click **Remove** to the right of the server details.

The **Integrations > iManage** parameters are described in the following table:

| Parameter | Description | Default |
|--|---|---------|
| Alternate Class Name (Legacy only) | For legacy (pre-Work 10) iManage environments. If the Use Alternate Class Name parameter is selected, the class name to use. This class MUST exist on your iManage server. | COMPARE |
| Alternate Conversion Class Name (Legacy only) | For legacy (pre-Work 10) iManage environments. If the Use Alternate Class Name for Conversions parameter is selected, the class name to use when converting to PDF. This class MUST exist on your iManage server. | DOC |

| Parameter | Description | Default |
|--|--|--------------|
| Default Server | The default iManage server to use in multi-server environments. Select one of your configured servers to be the default server. | |
| Document Profile name | When automatically profiling documents, the document profile name to use. | New Profile |
| Prevent users from adding or removing servers | If selected, users cannot add or delete server details in User mode. | Not selected |
| Use Alternate Class Name (Legacy only) | For legacy (pre-Work 10) iManage environments. If selected, the class name (specified in the Alternate Class Name parameter) is used in the profiling when saving Redline documents (comparisons). | Not selected |
| Use Alternate Class Name for Conversion (Legacy only) | For legacy (pre-Work 10) iManage environments. If selected, the class name (specified in the Alternate Conversion Class Name parameter) is used in the profiling when converting documents to PDF. | Not selected |
| Use AutoProfiling for iManage (Legacy only) | For legacy (pre-Work 10) iManage environments. If selected, automatic profiling is performed when adding documents to the iManage database. | Not selected |
| Use Work 10 integration for all registered servers (Work 10 only) | <p>In Work 10 environments, if selected, all servers will use the Work 10 integration.</p> <div> <p><i>Tip! Workshare automatically detects iManage servers and will auto-populate the server list. However Workshare assumes legacy servers so does not select the Use Work 10 Integration checkbox. Selecting this parameter is a quick way of ensuring all your servers use the Work 10 integration.</i></p> </div> | Not selected |

Integrations > Microsoft SharePoint

The **Integrations > Microsoft SharePoint** category is where you can add SharePoint sites configured on your SharePoint server details as well as set specific parameters determining how Workshare interacts with Microsoft SharePoint.

In User Mode, the **Integrations > Microsoft SharePoint** category is available for SharePoint license holders only.

Note: In order for this category to be available, you must ensure your Workshare license includes the SharePoint integration.

In Administrator Mode, the **Integrations > Microsoft SharePoint** category is always available.

Microsoft SharePoint
Configure Microsoft SharePoint integration with Workshare.

| Servers | |
|--|--------------------------|
| The site's URL | Metadata Cleaning Policy |
| Add | |
| Default View | <input type="text"/> |
| <input type="checkbox"/> Profile New Documents | |
| <input type="checkbox"/> Use Views | |

The list of specified SharePoint sites is displayed in the **Servers** section of the right pane. You can add new SharePoint sites configured on your SharePoint server as required.

To add a SharePoint site:

1. In the **Integrations > Microsoft SharePoint** category, click **Add**. An entry is added to the list of SharePoint sites in the **Servers** section.

| Servers | |
|----------------------|---|
| The site's URL | Metadata Cleaning Policy |
| <input type="text"/> | Internal Cleaning Policy ▼ Test Remove |

2. In the text box, enter the complete URL for the SharePoint site location.
3. From the **Metadata Cleaning Policy** dropdown list, select how the site is to be considered for policy application purposes. If you select **Internal Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed internally. If you select **External Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed externally.
4. Click **Test** to confirm connection to the specified site.

To delete a site from the list, click **Remove** to the right of the site details.

The **Integrations > Microsoft SharePoint** parameters are described in the following table:

| Parameter | Description | Default |
|------------------------------|---|--------------|
| Default View | The default view selected in the list of Use Views. | |
| Profile New Documents | <p>If selected, when a document is saved into SharePoint, a form is displayed to collect document metadata.</p> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: To enable this profiling feature, the SharePoint site must have custom content types set up.</p> </div> | Not selected |
| Use Views | If selected, a dropdown list of the views available in a SharePoint document library is displayed in the top right of the SharePoint browser window. This acts as a filter for the files displayed by the browser. | Not selected |

Registry Configuration

This section describes configuration of Workshare that is done by making changes in the Registry.

Important: *If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Only system administrators should attempt to make changes in the Registry.*

Convert Hyperlinks

When converting documents to PDF files, the Workshare PDF driver does not by default convert hyperlinks. Some PDF reader will convert hyperlinks within a PDF. If you want the Workshare PDF driver to convert hyperlinks when creating the PDF, you need to create the Registry value **PDFFileNameOptionsEx** in the Registry key SOFTWARE\Workshare\Options\10.00\Internal\PDF with a string value of **0x00140091**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user. Note that enabling this feature will impact performance and will slow down the PDF conversion process. If you want to turn the Convert Hyperlinks feature off, you should either remove this Registry value or change the Registry value to **0x00040091**.

Small Text Removal

When Workshare is configured to clean/delete small text (smaller than 5 points), it will check content for half sizes as well as full sizes (4.5, 4, 3.5, 3, 2.5, 2, 1.5, 1, 0.5) and this may slow down the cleaning process. If you want Workshare to just clean full point sizes (4, 3, 2, 1), you need to create the Registry value **HalfPointSmallTextSupport** in the Registry key SOFTWARE\Workshare\Options\10.00\Protect\ProtectAdmin with a string value of **true**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user.



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