

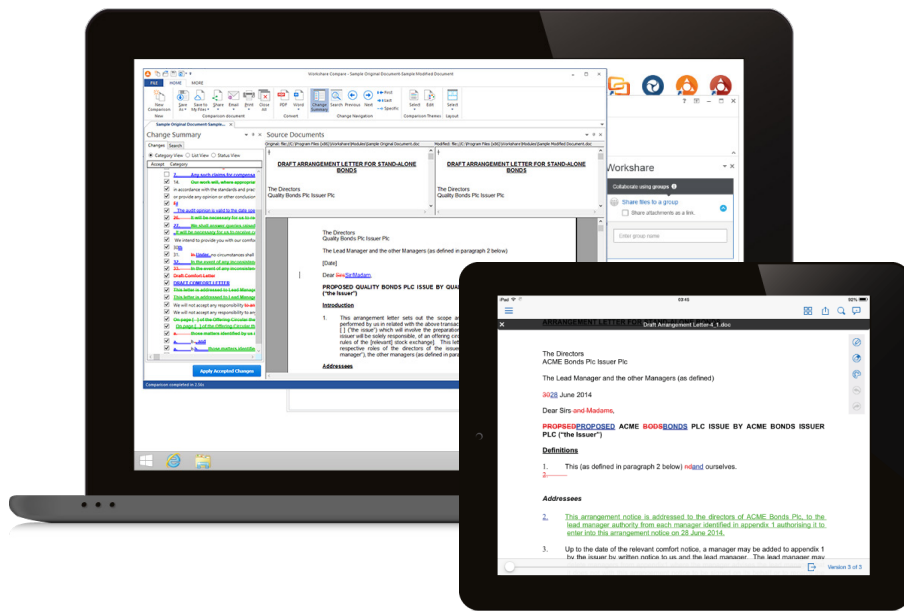


# Workshare 9

## Getting started guide

# Hello and welcome to Workshare 9

We're experts in document collaboration, and we have a simple concept with a simple goal – to help you work on documents with other people by giving you the right tools to do it. Workshare Professional combines three elements, each one designed to optimize a stage of the document review cycle.



## Compare your files

Seamlessly compare your documents, no matter the length or complexity of them, to spot all differences with the highest level of accuracy.

## Share files securely

Send large or sensitive files securely without email size limits restricting you. Clean files to ensure no sensitive information hidden within your files is shared inadvertently.

## Access files on the go

No matter where your files are stored, you don't need to be at your desk to access them. Search for and work on them, and compare to previous versions.

Let us show you around...

# Compare

## Compare Word, PDF or PowerPoint files

Compare two or more documents and instantly see any differences between them. There are two separate applications, depending on what type of documents you're comparing:

- **Workshare Compare** is used to see changes between Word documents and PDFs.
- **Workshare Compare for PowerPoint** is used to see changes between PowerPoint presentations.

There are several ways to access Compare and Compare for PowerPoint. Choose whichever option is most convenient for you.

### On your desktop

Double-click one of the icons on your desktop.

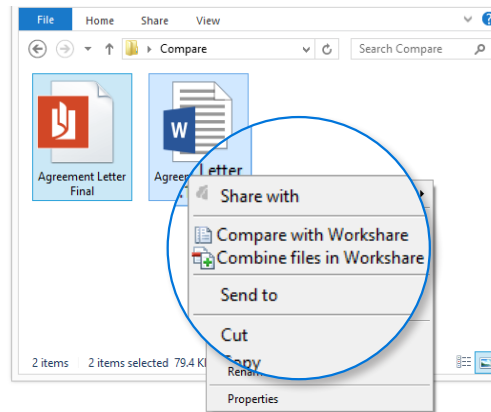


To compare Word or PDF files, select Workshare Compare. To compare PowerPoint files, select Workshare Compare for PowerPoint.

Once Compare or Compare for PowerPoint is open, you can select files to compare.

### In Windows Explorer or your DMS

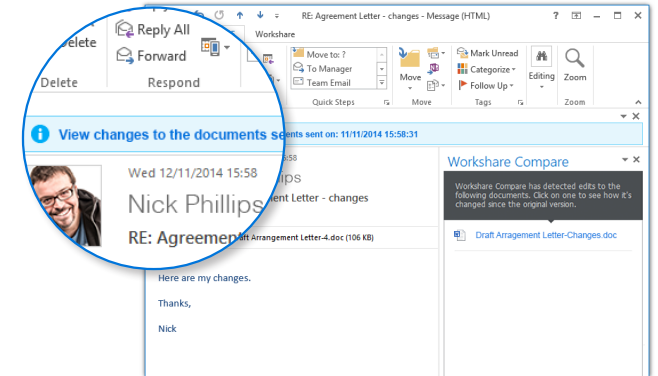
Select one or two documents, right-click and select **Compare with Workshare**.



Depending on which file types you've chosen, Compare or Compare for PowerPoint will be launched.

### In your email (Word documents only)

Workshare automatically detects if a received attachment is a changed version of a file you sent previously.



Click the attachment in the Workshare Compare panel to launch a comparison of the two documents.



# Compare

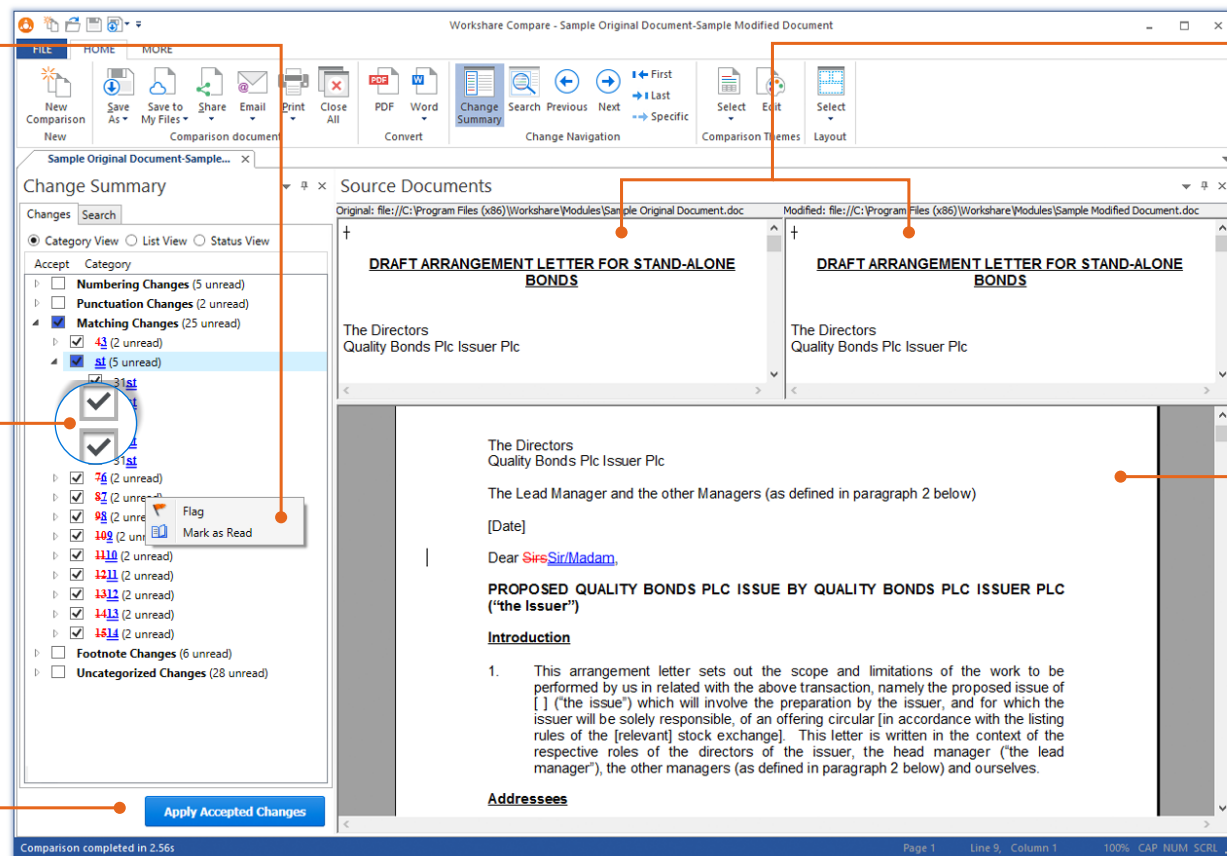
## Understand, implement and communicate changes between Word and PDF files

Once you've compared Word or PDF documents, you'll instantly see any differences between them in the Compare application. You can now manage your changes and save the comparison document (Redline document) or add your changes right from Compare and save the new version as a Word document.

**Flag** a change for review later. Right-click a change to see this option.

**Accept** a change by selecting it.

**See** the documents you're comparing.



**See** the comparison document (Redline document) with the changes displayed.

When you're ready, click **Apply Accepted Changes**.

A new Word document will open with the changes accepted. Any changes you did not accept will not be applied. You can save this Word document locally or to your DMS. If you have Connect, you can also **save** it to Connect so you can take the document with you wherever you go or **share** the document with others in a flexible workspace.

# Compare

## Understand and communicate changes between PowerPoint presentations

Once you've compared PowerPoint presentations, you'll instantly see any differences between them in the Compare for PowerPoint application. You can save the comparison as a PDF or a Compare for PowerPoint file (.WPF), or you can print the comparison.

**Save** the comparison as a .WPF file, which can be opened in Compare for PowerPoint.

**Create** a comparison report, which presents the changes in a PDF that you can save or send.

**Print** the comparison.

**See** the changes in the current slide.

**See** a list of the changes. Click a change to see where it's located in the presentations.

**See** all the slides in the presentations you're comparing.

🟢 - This icon indicates the slide is the same.

🟡 - This icon indicates the slide has been changed.

To view only changed slides, select **Hide unchanged slides** in the **View** tab.

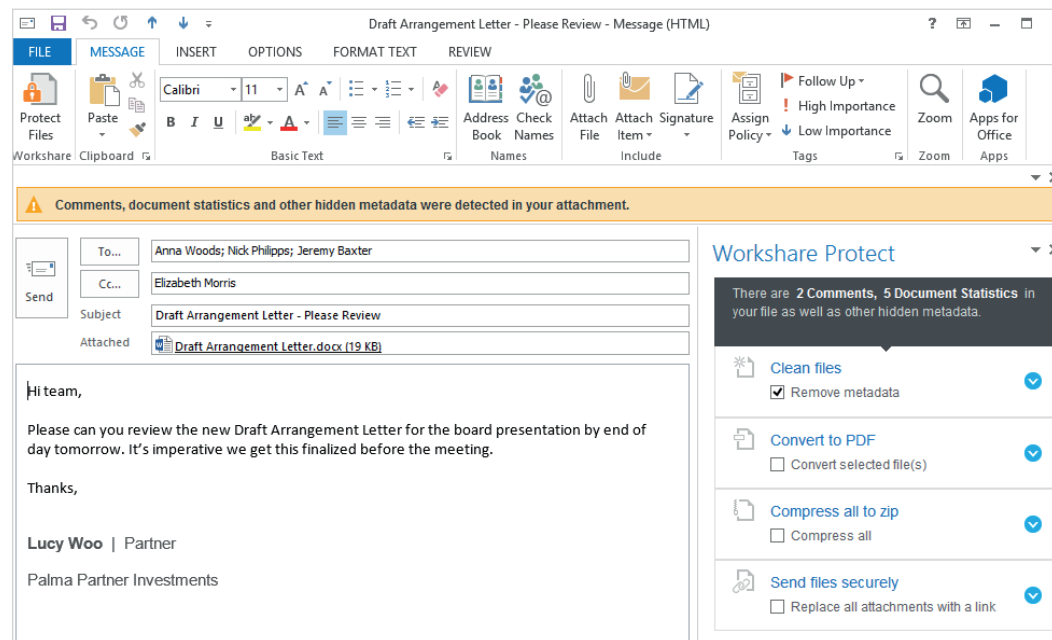
Slide Number	Change Numbers	Type	Status	Details
9/	1	Slide move source	#a	
/10	2	Slide move destination	#a	
/12	3	Inserted slide	#a	
12/13	4-5	Replaced text	#a	QualityQuality Management and Performance Measures
12/13	6-7	Replaced text	#a	\$Define quality managementmanagement plans
12/13	8	Inserted text	#a	\$How will you monitor and control costs?
12/13	9	Inserted text	#a	\$How will you monitor and control schedule?

# Share

## Identify risk in attachments

Workshare enables you to protect yourself from accidentally sharing sensitive data you may want to keep private. You can find and remove hidden metadata. For example, this could be track changes, the author's name, server names, keywords, routing slips, authoring trails, hidden slides, comments, speaker notes or hidden sheets. You can also convert your documents to PDF or PDF/A.

The primary way to access Workshare's protect functionality is in email. When you add an attachment to a new email, Workshare automatically scans the document for sensitive data, and reports on what's found in a notification at the top of your email and in the Interactive Protect panel on the right of your email.



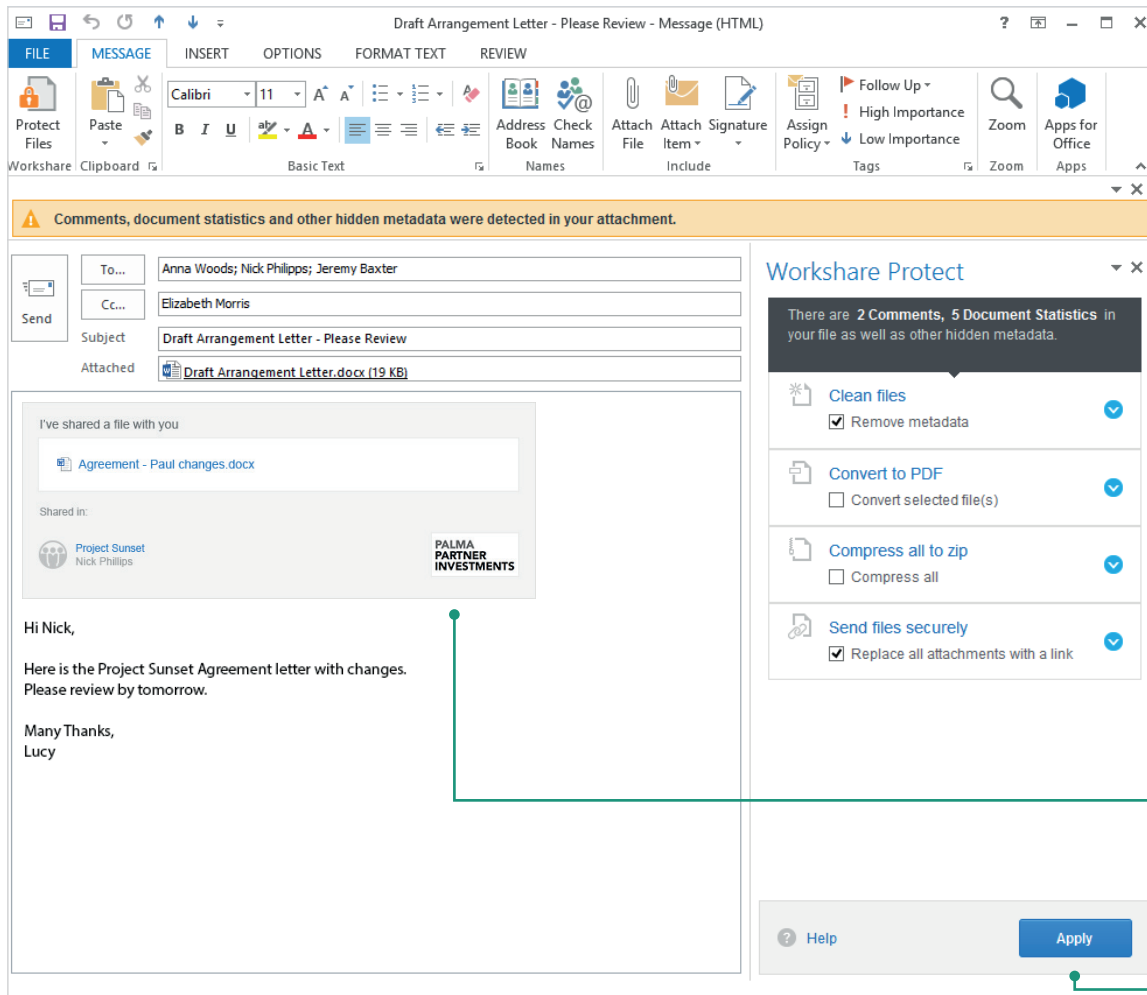
You can also protect documents if you're not emailing them. In open Office documents, click **Content Risk** in the Workshare tab to get a comprehensive report of all metadata in the file. You can then remove selected metadata.

**i** Depending on how your administrator's configured your settings, you may be notified of sensitive data when you click the **Send** button. If this happens, you'll see either the Protect Profile dialog or Email Security dialog instead of the Interactive Protect panel. For more information, see the Workshare 9 User Guide by searching "workshare 9 user guide" in the knowledge base: [workshare.force.com/knowledgebase](https://workshare.force.com/knowledgebase)

# Share

## Protect your attachments before you email them

From the Interactive Protect panel, you can see what risky information is in your documents and remove it. You can also send attachments to a secure location and send recipients a link to that location.



**See** what sensitive data is in your attachments.

**Control** and **secure** your documents. You can expand these options to specify which metadata is removed and which documents are protected.

**Share** your documents in a workspace where you can review them with others.

The document protection options you've selected (such as removing metadata or converting to PDF) will be applied and the documents will be saved in a folder in Connect. A link to the folder will be added to your email.

The recipients of your email can access the documents by clicking the link when they receive the email.

**Apply** your changes when you're ready. While your documents are being processed, you can write your email.

# Access

## Save, share and get live updates

Workshare enables you to connect to the people you work with, the documents you care about and the devices you use. Workshare integrates with the Compare application, Microsoft Office and your desktop in different ways. Choose the one that's right for the document's stage in the review cycle.

### Save your documents or redlines

You can work on your private documents wherever you want by simply adding them to Workshare. They'll be accessible online, on your desktop and on your mobile.

Choose the way that's easiest for you:

- Drag and drop the document into **My Files**, found in your **Workshare sync** folder.
- If you have a document open in Compare, Word, PowerPoint or Excel, you can use the **Save to My Files** button.

### Share your documents or redlines

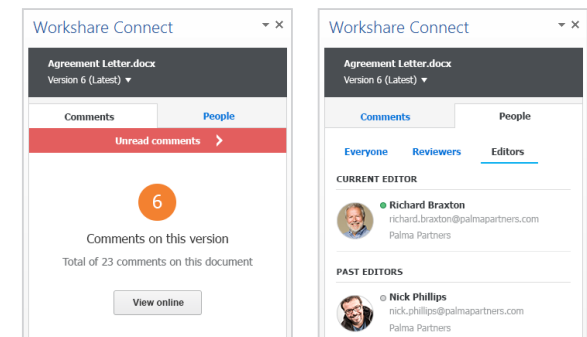
When you're ready to work with others to review the documents, you can share them in a group or a folder.

Choose the way that's easiest for you:

- Drag and drop the file into a group or a folder in your Workshare sync folder.
- If you have a document open in Compare, Word, PowerPoint or Excel, you can use the **Share** button.
- If you have the Interactive Protect panel open in a new email, you can share your attachment by selecting **Replace all attachments with a link**.

### Get live updates on your collaboration

If you've shared a document to a group, you'll see the Workshare Connect panel when you open the document in Word, PowerPoint or Excel.



The panel gives you real-time updates on what's happening to your document in Workshare, including who is sharing your document, how many comments have been made, and whether any new versions have been added.

#### Workshare sync folder

When you install Workshare 9, the **Workshare sync** folder automatically appears under **Favorites** in Windows Explorer. You can use it to synchronize content between your PC and Connect. For more information, see the Workshare 9 User Guide by searching "workshare 9 user guide" on the knowledge base: [workshare.force.com/knowledgebase](https://workshare.force.com/knowledgebase)



# Access

## Access your private documents and collaborate in groups

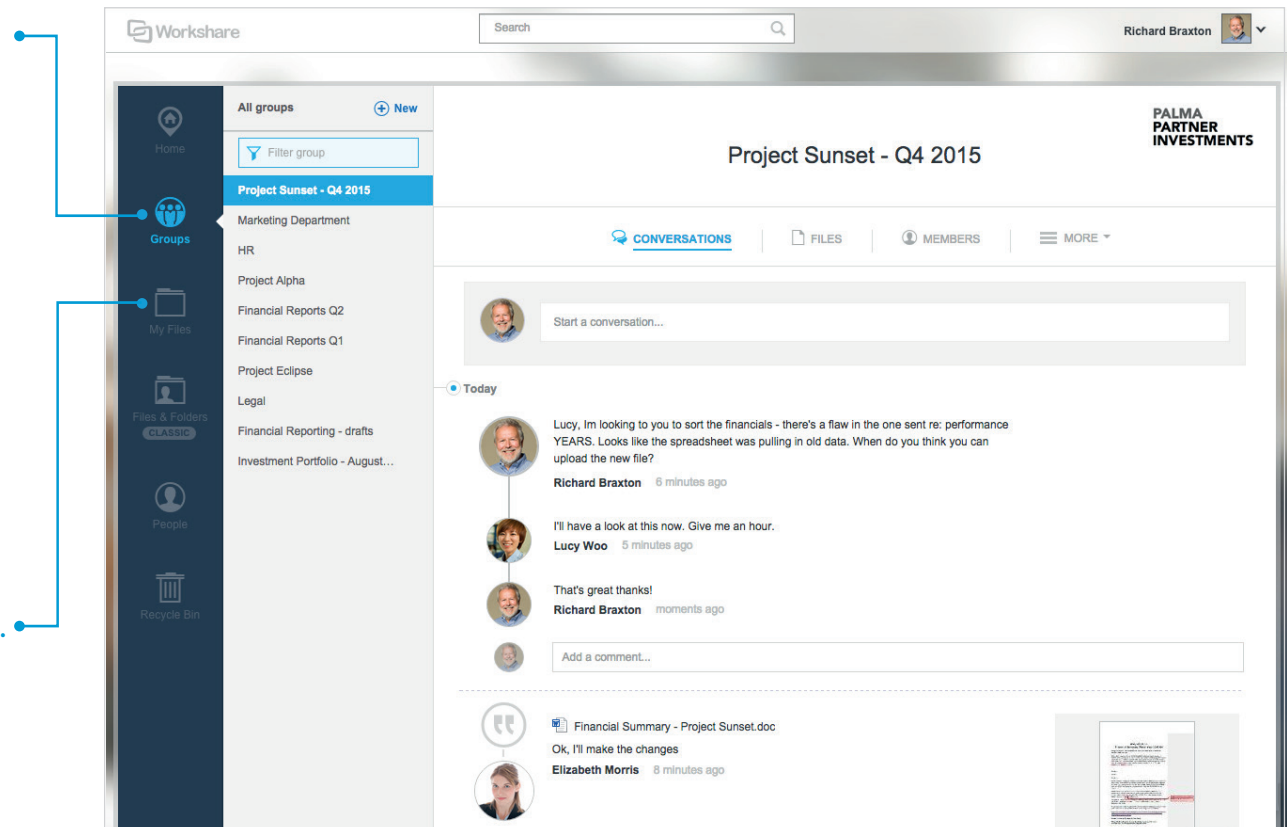
You can access your private documents and groups at any time. Just open the Workshare desktop app or go to **my.workshare.com**.

You can **share** documents on Workshare in a **group**. Groups are workspaces where you can share files with people inside and outside your company. You control what people can do with your documents and how they can be accessed.

- Anyone can post to **Conversations** to share an idea with the group. It's a great place to discuss how the work is going and understand what will happen next to the documents.
- **Files** is where you can see your documents, mark changes to be made and upload new versions when they're ready.
- The people you see in **Members** have access to the files and conversations in the group. These people will take the documents through to the next stage of their evolution.

When you **save** documents to Workshare, they appear in **My Files**. This area is where you can keep files you need to access but don't want to share. They sync across your devices so you can keep working from anywhere.

Edit them, move them or delete them – it won't affect anyone else. When you're ready to work with others, you can share a copy to a group.



- i** You can also use the **Workshare sync** folder for accessing files. Any changes you make in your **Workshare sync** folder will be reflected in the web app and vice versa. For more information, see the Workshare 9 User Guide by searching "workshare 9 user guide" on the knowledge base: [workshare.force.com/knowledgebase](https://workshare.force.com/knowledgebase). Additionally, you can get the Workshare mobile app for free from the App Store. With the app, you can access and review content from your tablet or mobile.

## Knowledge base

For step-by-step instructions  
to use these features, see

[workshare.force.com/knowledgebase](https://workshare.force.com/knowledgebase)

## Technical support

If you've got a support license,  
email us at

[support@workshare.com](mailto:support@workshare.com)