

Workshare Protect 9.5

Release Notes

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What is Workshare Protect

Workshare Protect helps companies eliminate the risk of accidentally sharing sensitive data, without interrupting established workflows.

Key features of Workshare Protect include:

- Advanced, interactive metadata cleaning/PDF creation/secure file transfer for attachments in Outlook
- Comprehensive content risk protection enabling the discovery and removal of hidden sensitive data as well as visible sensitive data
- Options to save and share Office documents to Workshare online
- Access and visibility into online collaborative workspaces directly from Office
- Secure file sharing from all devices and browsers with metadata removal and end-to-end encryption
- Centralized policy design and enforcement administrator tools
- Centralized user account management and control
- Complete access to Workshare online functionality to share and collaborate on documents, including setting folder access and permissions, positional commenting and reviewer communications with presence indicators
- Desktop sync app to synchronize your online content to your local desktop

Note: *Workshare Protect can be installed without Microsoft Office integration. In this case, the metadata removal functionality is only available when sending emails.*

What's New in Workshare Protect 9.5

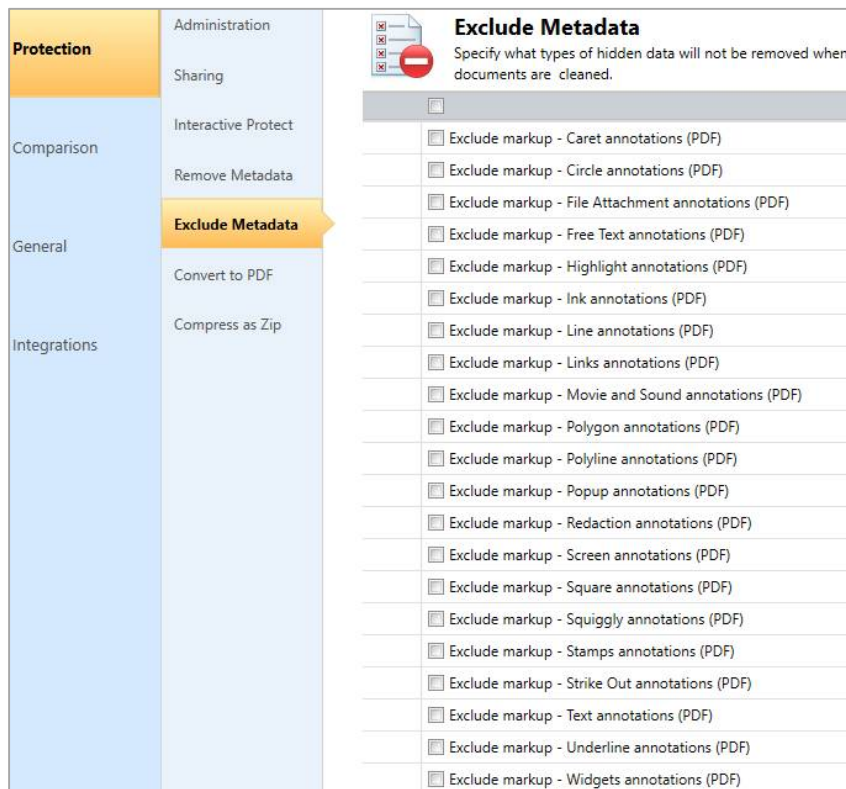
Workshare Protect 9.5 is a 32-bit and 64-bit release that focuses on improving performance. It includes the following new features.

Workshare Professional 9.5.4

This is a maintenance release which fixes a number of issues. In addition it includes the following new exclusion parameters:

- **Exclude markup annotations:**

When cleaning metadata from a PDF file, you have always been able to remove any markup in the file. (Markup is a tool used to make comments and annotations to PDF documents.) With 9.5.4, you can exclude specified types of annotations from the cleaning process. For example, Highlight annotations or Strike Out annotations or Caret annotations. These exclusions are configured in the Protection > Exclude Metadata category of the Workshare Configuration Manager.



Workshare Protect 9.5.3

- **Installation**

The NetDocuments ndOffice msi is no longer included in the Workshare installation bundle. Instead, it is a requirement that ndOffice must be installed in order to use the Workshare NetDocuments integration. This is to ensure the latest version of ndOffice is installed and brings the NetDocuments integration in line with our other integrations.

Workshare Protect 9.5.2

- **Environments:**
 - Added support for OpenText DM 16.2
 - Restored support for IBM Notes 9.0.1 FP7, FP8 and FP9

Note: *Interactive Protect and the replace email attachment with link features of Workshare are not supported in a Notes environment.*

Workshare Protect 9.5.1

- **Environments:**
 - Added support for iManage Work 10

This is just the first part of integration to iManage Work 10, mainly aimed at the users who are using it on their desktops in the office through the *Work 10 for Office* client, or still using earlier versions of *Filesite/Desksite* with the Work 10 server.

Note: *This release does not support Notes environments.*

Workshare Protect 9.5 GA

- **Improves Protect performance:**
 - Lightspeed clean is now the default setting. Lightspeed cleaning has been re-engineered. It is incredibly fast and very reliable. Workshare now removes metadata more quickly than any competitors - from 1.5 to 25 times faster depending on the size of the document.
 - The single Office add-in makes it quicker to load and doesn't slow Outlook. The performance enhancements delivered reduce the local memory consumption ensuring Workshare consumes fewer resources.

- **Provides faster synchronization time:**

Improvements to both uploads and downloads by increasing the minimum number of sync threads from 1 to 4, improving the access to the database and not processing redundant activities. Now entire matters can be synced to replace USB/CD delivery.

Also UI improvement to keep users informed in the desktop app of sync progress.

- **Aligns the 32-bit and 64-bit versions**

- **Improves licensing:**

No more interruption for users when they are in a licensed state and no more purchase links for end-users. A less intrusive renewal message is displayed only after the license term expires. There is also differentiation in the messaging for trial and paid users.

Workshare Protect 9.5 also includes the following changes in environment support, installation and configuration:

- **Environments:**

- Dropped support for Office 2007
- Added support for Windows Server 2016; dropped support for Windows Server 2008.

Note: *This release does not support Notes environments.*

- **Installation:**

- Reduction in MSIs and add-ins: Only one add-in in Outlook now and one less MSI to install.

- **Workshare Configuration Manager:**

The following parameters were added:

- **Report on content policy violations** (Protection > Administration)
- **Exclude Referenced documents (Lightspeed Clean only)** (Protection > Exclude Metadata)
- **Select 'Retain attachments in Sent Item' checkbox by default (Interactive Protect only)** (Protection > Sharing)

The following parameters were removed:

- **Delete ink annotations (Lightspeed Clean only)** (Protection > Interactive Protect and Protection > Remove Metadata)
Ink annotations cannot be removed when using Lightspeed clean. If using regular cleaning, ink annotations are considered a type of comment and can be removed.
- The **Email security dialog while discovering risk** option in the **When sending an email with attachments show** parameter (Protection > Administration)
Discovery is now so fast, there is no need for this option.

System Requirements

The recommended system requirements for Workshare Protect 9.5 are:

- Intel Core i3 @ 2.5GHz
- AMD Athlon 64 X4
- 4GB RAM

Workshare 9.5 has a 32-bit version for 32-bit Microsoft Office environments and a 64-bit version for 64-bit Office environments.

Certified Environments for Workshare 9.5 (32-bit version)

Workshare 9.5 (32-bit version) has been tested and certified in a number of environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support (support@workshare.com) for any help.

For details of which environments previous versions of Workshare Professional/Compare/Protect were certified against, refer to previous versions of release notes on the knowledge base.

Note: Unless otherwise stated, all environments are the English version with the en-us language set.

Operating System:

- Microsoft Windows 10 (32 bit and 64 bit)
- Microsoft Windows 8.1 (32 bit and 64 bit) + Japanese
- Microsoft Windows 7 SP1 (32 bit and 64 bit) + Chinese Simplified & French

Citrix:

- With Microsoft Windows Server 2012 R2 or 2016 (64 bit)
 - Citrix XenApp 7.5
 - Citrix XenDesktop 7.5

Note: Check with your Citrix vendor about which Windows operating system supports your version of Citrix.

Microsoft Office System:

- Microsoft Office 2016 (32 bit) – including click-to-run
- Microsoft Office 2013 SP1 (32 bit) + Japanese – including click-to-run
- Microsoft Office 2010 SP2 (32 bit) + Chinese Simplified & French

Email System:

- Microsoft Outlook 2016 (32 bit)
- Microsoft Outlook 2013 SP1 (32 bit) + Japanese
- Microsoft Outlook 2010 SP2 (32 bit) + Chinese Simplified & French
- IBM Notes 9.0.1 FP7, FP8 and FP9

Note: *Interactive Protect and the replace email attachment with link features of Workshare are not supported in a Notes environment.*

Browsers:

- Microsoft Edge, latest version
- Microsoft Internet Explorer 11
- Google Chrome, latest version
- Mozilla Firefox, latest version

Microsoft SharePoint:

- Microsoft SharePoint 2013 SP1

DMS Integration:

Note: *Check with your DMS vendor about which Windows operating system supports your DMS.*

- **NetDocuments**

ndOffice must be installed to use the Workshare NetDocuments integration.

Note: *If you want Workshare to be available when using the NetDocuments **Send to application** functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).*

- **iManage clients:**

- FileSite/DeskSite 9.0 Update 6 and above
- Work 10 Desktop for Windows 10.0 and above
- Work 10 web client (You will need to [install Workshare iManage Integration Server](#) in order to launch comparisons from the iManage browser interface.)

Note: *If you use an iManage Work 10 server, it must be installed on-premise or in an iManage private cloud. If it's a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91.*

- **OpenText:**
 - eDOCS DM 16.2
 - eDOCS DM 10
 - eDOCS DM 5.3.1 COM only (Patch 6)
- **Worldox:**
 - GX4

Workshare will endeavor to support future service packs of certified environments.

Certified Environments for Workshare 9.5 (64-bit version)

Workshare 9.5 (64-bit version) has been tested and certified in a number of environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support (support@workshare.com) for any help.

For details of which environments previous versions of Workshare Professional/Compare/Protect were certified against, refer to previous versions of release notes on the knowledge base.

Note: Unless otherwise stated, all environments are the English version with the en-us language set.

Operating System:

- Microsoft Windows 10 (64 bit)

Citrix:

- With Microsoft Windows Server 2012 R2 (64 bit)
 - Citrix XenApp 7.5
 - Citrix XenDesktop 7.5

Note: Check with your Citrix vendor about which Windows operating system supports your version of Citrix.

Microsoft Office System:

- Microsoft Office 2016 (64 bit) – including click-to-run

Email System:

- Microsoft Outlook 2016 (64 bit)

Browsers:

- Microsoft Edge, latest version
- Microsoft Internet Explorer 11
- Google Chrome, latest version
- Mozilla Firefox, latest version

DMS Integration:

Note: Check with your DMS vendor about which Windows operating system supports your DMS.

- **NetDocuments**

ndOffice must be installed to use the Workshare NetDocuments integration.

Note: If you want Workshare to be available when using the NetDocuments **Send to application** functionality, Microsoft Internet Explorer must be installed (although it does not have to be the default browser).

- **iManage clients:**

- FileSite/DeskSite 9.3 (64 bit) and above
- Work 10 Desktop for Windows 10.0 (64 bit) and above
- Work 10 web client (You will need to [install Workshare iManage Integration Server](#) in order to launch comparisons from the iManage browser interface.)

Note: If you use an iManage Work 10 server, it must be installed on-premise or in an iManage private cloud. If it's a Work 10.2 server, it must include iManage Work Web Server 10.2.0.91.

- **OpenText:**

- eDOCS DM 16.2
- eDOCS DM 10 (64 bit)

Workshare will endeavor to support future service packs of certified environments.

Important Information

Secure PDFs – Workshare Protect is unable to compare secure PDFs or convert secure PDFs to Word format. Secure PDFs are PDF files with security settings configured.

POP/IMAP – Workshare Protect does not support Outlook when it is configured with a POP or IMAP account.

Important installation information

- Workshare Protect installs program files to a sub-folder within the Workshare folder named **Modules**.
- **Install:** A user is unable to install Workshare Protect if Microsoft Windows Installer 3.1 is not installed. This can be downloaded from the following location <https://www.microsoft.com/en-us/download/details.aspx?id=25>.
- **Windows 7:** When UAC is set to **Default**, running the Workshare Protect install displays the UAC prompt. You must approve the prompt and Workshare Protect will be installed. Running the Workshare Protect MSI silently will fail when UAC is set to **Default** because the user is not given the opportunity to approve the UAC prompt. Therefore for silent installs, disable UAC.

If you have installed any Alpha or Beta builds of Workshare Protect, we strongly recommend that you first uninstall them before installing Workshare Protect 9.

Change Requests Fixed

The following are fixed customer change requests that have been validated for this release - for more information, please contact Customer Support.

Workshare Professional 9.5.4

The following are fixed customer change requests that have been validated for the Workshare 9.5.4 release:

CR#	Ref	Description
PRO-196	CR01043109	Scanned documents are corrupted after scrubbing the 'Property' metadata with Protect
PRO-225	CR01104565	Protect converting PDF/A file contents to white text
PRO-256		Risk elements count incorrectly displayed on Document Risk Report while performing Content Risk action for PowerPoint documents having modify password restriction.
PRO-260	CR01106474	6pt Japanese text appear as 'High Risk' elements in Content Risk Report
PRO-591	CR01120269	Right- click menu is severely lagged when Workshare is integrated with OpenText.
PRO-735		Continuous spinning is displayed on IP pane when threshold limit is set in WCM.
PRO-760	CR01129657	Workshare was unable to create a reply. Ensure that your default mail program in internet explorer is set correctly

CR#	Ref	Description
PRO-786	CR01130122	Outlook warning message "Want to save your changes?" when closing email and Workshare add-in is being enabled
PRO-802	CR01065327	Paragraph styles change to 'Normal' when cleaning reviewers in track change documents
PRO-824	CR01067400	HP scanned PDF's are becoming corrupted after cleaning with IP, Protect Profiles or batch clean.
PRO-834	CR00175543	Change Bars are not retained when converting to PDF from Compare ribbon
PRO-851	CR01074067	Stamp signatures in PDF documents being removed when deleting markups
PRO-869	CR01076568	'Member not found' error displayed when forwarding emails containing linked images in the signature
PRO-901	CR01074432	Word documents losing margins when cleaning fields
PRO-905	CR01072966	Scanned PDF version 1.3 document gets corrupted when cleaning
PRO-98	CR01099133	Professional 9.5 64 bit: "WorksharePolicyDesigner-787.X64.exe" fails to install
PRO-995	CR01133425	"The setting could not be created" error message displayed when converting documents to PDF
PRO-998		Unable to perform Workshare actions from FileSite right click context menu when FileSite is configured with 2 worksite servers using SAML & Normal method.
PRO-1009	CR01134033	Error: 'Content discovery failed' when cleaning excel sheets containing Russian Cyrillic characters
PRO-1118	CR01134663	Attachments are not cleaned or converted to PDF when SimplyFile application is integrated with Outlook and Exchange cached mode is off
PRO-1136	CR01137311 (Spike)	Error message: Namespace is undefined when connecting to iManage Work 10 using Microsoft Azure single sign on
PRO-1141	CR01137545	Style Separators becoming regular paragraph marks and splitting paragraphs after cleaning
PRO-1162	CR01138618	Uninstalling Workshare makes the iManage icons in Word and Outlook disappear
PRO-1259		Unable to perform workshare actions from Filesite right click context menu when Filesite is configured with worksite servers using SAML/Normal method.

CR#	Ref	Description
PRO-1275	CR01140073	"Unexpected Error. Illegal characters in path" when forwarding an email containing an .MSG attachment with quotation mark " in the subject field
PRO-1297	CR01141162	Error message: Invalid file. The file you have been trying to upload is invalid. Please try to uploading a valid ZIP file when uploading Workshare's Office Extension to iManage Work 10 server
PRO-1298	CR01141137	Incorrect version of OpenText displayed in the 'Save as' dialogue box
PRO-1351	CR01143443	Protect 9.5 64 bit: Attachments are not cleaned or converted to PDF when Egress application is integrated with Outlook and Exchange cached mode is off
PRO-1367	CR01143544	Microsoft Word documents are not converted to PDF
PRO-1377		No Permissions...' error dialog is shown while performing 'Share' or 'Save to My Files' operations on documents of size greater than 5MB with hybrid user accounts.
PRO-1428		Both Original and Converted pdf attachments are shown in Sent Items folder when PDF action performed using 'Send and Protect'.
PRO-1448		DMS save functionalities are not working when user configured with 'legacy' server in Outlook and WCM.
PRO-1458	CR01148702	Outlook attachments are not updated when Forwarding email with existing attachments in Online Mode
PRO-1462	CR01148703	Conflict with Workshare Ribbon Add-in and ndOffice with the DocumentClose event
PRO-1469		Do you want to open the document from disk' message is displayed when iManage is configured with Legacy server and server is disconnected in WCM.
PRO-1470		iManage work' login dialog is displayed when saving the converted pdf document to legacy server when both work10 and legacy servers are configured in both outlook and WCM.

Workshare Protect 9.5.3

The following are fixed customer change requests that have been validated for the Workshare 9.5.3 release:

CR #	Ref	Description
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CR #	Ref	Description
01043533	PRO-87	Workshare temp files/folders are not being removed when using Advanced security dialog or desktop profiles.
01110921	PRO-398	Workshare Configuration Manager crashes when launching in Administrator mode.
	PRO-524	Error displayed when converting additional attachments to link.
01121371	PRO-616	“Test connection failed. Failed to connect to the server” is displayed when connecting to iManage Work 10 using a SAML AD authentication method.
01129671	PRO-761	Error: “Document profile is invalid. Document type for this format is not available on iManage server” is displayed when attempting to save a .doc file to iManage.
01100041	PRO-126	Warning message: “A program is trying to access email address information stored in Outlook.”
01098438	PRO-231	Error: “No valid launch method is found” is displayed when launching the .wpf file from DM server.
01111205	PRO-409	Ability to allow PowerPoint comparison reports to be saved as an attachment to the original presentation in OpenText DM.
01113092	PRO-470	Convert to PDF option in Microsoft Word generates incorrect modified and accessed time.
01113679	PRO-477	“Cache distribution lists” and “Cache distribution lists refresh rate (days)” options are no longer available within the Workshare Configuration Manager.
	PRO-529	Documents are opened with Temp file name when clicking the preview button in the “Workshare Protect - Convert to PDF” window.
	PRO-531	Original document is also being uploaded to Workshare along with the .zip file when both link and zip actions are performed.
01116698	PRO-538	Interactive Protect cleaned attachments are being processed by Protect Server when “Skip processing on messages processed by Workshare Protect Client” is checked.
01117949	PRO-567	Saving A3 page comparison as PDF results in missing content.
01120268	PRO-590	Document ID is displayed instead of Document Description when selecting documents from OpenText.
01121390	PRO-623	Document ID is displayed instead of Document Description when selecting documents from iManage FileSite.

CR #	Ref	Description
01083253	PRO-663	Workshare add-in in Excel causes a warning in Excel when using the Query function.
01124544	PRO-675	Carbon Black software is flagging Workshare.Professional.msi contains malware during installation.
01129786	PRO-766	Protect 9.5.2 – RPC error when converting Word documents to PDF using Interactive Protect.
01129780	PRO-767	Pro9 Update 7a – GDI leak occurs when using the iManage ribbon in Outlook.
01098336	PRO-39	Request to show “Unsupported Microsoft Office 6/95 file formats” error message when cleaning unsupported .doc Word documents using content risk.
01094095	PRO-91	Closing Word or Excel is taking 20-30 seconds when Workshare add-in is enabled.
01049562	PRO-201	Request to modify default comment in Save dialog to OpenText
01077212	PRO-307	Open PDF in Word results in a blank document.
	PRO-628	Registry key not set when installing with Desktop Shortcut turned off.
01125821	PRO-736	Convert to PDF option stays checked in Interactive Protect panel when deselecting it and clicking “Apply”.

Workshare Protect 9.5.2

The following are fixed customer change requests that have been validated for the Workshare 9.5.2 release:

CR #	FB #	Description
01105299		Forwarding certain emails with PDF attachments causes Outlook to hang or crash.
01075183		‘Interactive Protect could not be started for this message’ error displayed on Send when Payne Metadata Assistant 5 add-in enabled.
01109471		‘Insufficient memory to continue the execution of the program’ error when forwarding certain emails containing a .msg file.
01111190		‘System.OutOfMemoryException’ error when forwarding certain emails with attachments from Sent Items folder.
01052011		Missing parts of file name after converting documents containing dots in the file name to PDF.

CR #	FB #	Description
01094845		Completing a task completes all tasks and makes Outlook crash.
01093241		Custom policies are not triggered when using the 'Send and Protect' button.
01072628		White field codes in footer cannot be cleaned.
01051305		Letter-sized PDFs are created from A4-sized source documents.
01105223		'Insufficient memory to continue the execution of the program' error when sending an email containing a .msg file.
	45219	In Outlook (inline view), the Link option is still shown after converting an attachment to a link.
	45484	When performing zip and convert to link actions, the unzipped original document is also uploading to Workshare along with zip file.
	45657	The Workshare Getting Started Guide doesn't launch after re-running the Workshare Configuration Assistant.
	45694	After converting attachments to links and then deleting those links from the body of the email, a 'Value cannot be null' error is displayed when sending the email.

Workshare Professional 9.5.1

The following are fixed customer change requests that have been validated for the Workshare 9.5.1 release:

CR #	FB #	Description
1093288	45592	Error appears after attempting to use the Convert to link option on a PDF over 250MB.
1074548	42722	Certain custom Block policies are triggered unexpectedly when sending emails with attachments to recipients with email addresses on the Outlook Auto-Complete list.

Workshare Professional 9.5 GA

The following are fixed customer change requests that have been validated for the Workshare 9.5 GA release:

CR #	FB #	Description
00431065	19552	Local Open or Save dialog box does not appear in Excel

CR #	FB #	Description
01036602	36362	Ability to configure Interactive Protect convert to PDF setting in WCM
01047815	37364	RPC error when converting Office documents to PDF using Interactive Protect
01051283	38311	Unable to share documents with long filenames
01051614	38558	Clean before PDF option is not selected when using combine files in Workshare
01051797	38471	Sharing an iManage Word doc in Word causes the file to be named with DocID instead of the doc name
01054364	38915	Could not load file or assembly 'ChilkatDotNet4, Version=9.1.1.0' when sending emails with attachment
01056051	39305	Revision number, last Printed, total Editing time are not being removed when using content risk
01057021	39457	Excel hangs when using Workshare Content Risk
01057775	39625	Custom fonts and macros not being saved to normal.dotm when Workshare addin is enabled
01061739	40432	Convert to link does not work when including yourself
01062319	40593	Outlook crashes when trying to forward certain emails.
01062343	40600	Unable to clean documents created with TMS template.
01063259	40758	Unable to clean certain Word documents when 'Small text' metadata option is checked
01063789	40861	Convert track change document to PDF automatically accepts changes
01067665	41606	Hidden text is removed when sending documents internally.
01068870	41798	Notification bar for Interactive Protect is not displayed correctly in Outlook 2016
01069584	41958	Password dialog triggers when sending a password protected document internally
01069681	41926	Unable to save docs with long file-names into NetDocuments when include document descriptions is enabled
01070668	42066	Email signature is not populated when using send document from FileSite
01071390	42180	Legal-sized PDFs are created from letter-sized source documents

CR #	FB #	Description
01072374	42251	Object reference not set to an instance of an object" when sending email with or without attachment to multiple distributions list
01072975	42399	Linked signature images are stripped and sent as attachments when sending email with ACN and IP enabled
01073165	42484	Unable to clean and send a password protected PPT/X docs when a dot (.) and name/number before file extension
01073553	42486	Protect flagging PDF signature as invalid when sending and cleaning PDF attachment
01073730	42556	Interactive Protect panel does not automatically trigger when sending a Word document as an attachment
01083512	44356	Unable to re-share documents that was shared once in a Group on Connect.

Known Issues

The following are known issues in the Workshare Protect 9.5 release - for more information, please contact Customer Support.

Ref	Description
PRO-1563 01149167	When documents include checkboxes, the data in the checkbox (such as an X) is removed when the document is cleaned with lightspeed clean.
PRO-1564 01150846	Attachments are still cleaned after deselecting all individual options in the Interactive Protect panel.
PRO-1009/ 01134033	A "Content discovery failed" error is displayed when cleaning Excel sheets containing Russian Cyrillic characters
PRO-851/ 01074067	Stamp signatures in PDF documents are removed when deleting markups using Batch Clean.
PRO-528	IBM Notes 9.0.1 FP7 only. Attachments are duplicated in sent items when the email is processed through desktop profiles or all mail profiles. This is an issue with IBM Notes .
PRO-527	IBM Notes only. Attachments are not automatically compressed to a zip file when the limit specified in the WCM is reached.
PRO-525	The positioning of signature components in RTF format emails can be incorrect after processing with Protect.
PRO-255	Unable to use Content Risk on a password-protected document in Read Only mode without entering the password.

Ref	Description
PRO-225/ 01104565	Protect is converting the contents of specific PDF/A files to white text.
PRO-99	The Link option is displayed in the attachments bar even after deleting all attachments from an email written in plain text format.
01018743	The font in the email body changes to Times New Roman when sending attachments to groups in Interactive Protect.
40574	A user is not automatically logged into Professional after logging into the desktop app first (64-bit version only).
40597	The local file store dialog is displayed when browsing for files from the desktop app when a DMS is set as the default (64-bit version only).
45219	In Outlook (inline view), the Link option is still shown after converting an attachment to a link.
45484	When performing zip and convert to link actions, the unzipped original document is also uploading to Workshare along with zip file.
45581	When sending an email to a distribution list and applying the Secure File Transfer or Clean & Secure File Transfer policy (Protect Profile dialog), the email is processed and sent without showing the information dialog about the recipients within the distribution list.
45583	When a machine is restarted before the convert to link process has completed, files which are not synced are moved to a conflict state in the desktop app.
45620	When replying to an email and attaching a particular PDF, using Interactive Protect to clean the PDF can trigger an error.
45657	The Workshare Getting Started Guide doesn't launch after re-running the Workshare Configuration Assistant.
45694	After converting attachments to links and then deleting those links from the body of the email, a 'Value cannot be null' error is displayed when sending the email.

Contact Info

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

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For details of Workshare patents, see www.workshare.com/patents

Revisions

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