

Workshare Professional and PDF

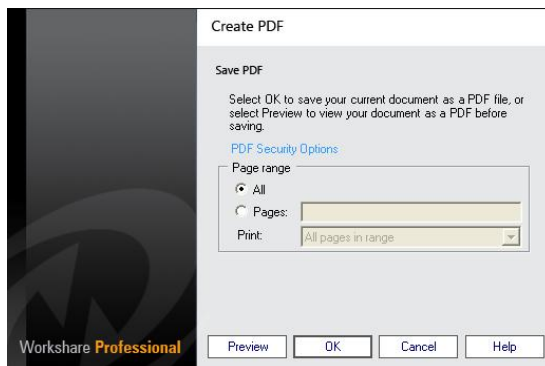
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Converting Documents to PDF

Workshare Professional enables you to quickly and easily convert Microsoft Word, Excel and PowerPoint documents into PDF (Portable Document Format). This functionality is available from within an open document or when the document is closed. Before Workshare Professional converts the document, you can select to remove sensitive hidden data from the document.

To convert an open document to PDF:

1. Open your document and click PDF in the Home page of the Workshare Panel. The *Create PDF* dialog is displayed:



2. (Optional) Click the PDF Security Options link to clean document as well as set PDF security options. The *PDF Security Options* dialog is displayed.



3. Select the Clean before PDF checkbox if you want to remove hidden data from the document before converting it to PDF. You can then click the Advanced Cleaning Options link to specify which hidden data to remove.
4. If required, select one or more of the security options to prevent recipients from printing, editing or copying from the PDF document or adding comments to it.
5. If required, set a password to protect the security settings by entering the password twice in the relevant fields. When a password is specified, the recipient can only change the security for the PDF (by selecting Document Security from the *File* menu in Adobe Acrobat) after entering this password.
6. Click OK.
7. If you want to create a PDF of part of the document only, select the Pages radio button and specify a page range. From the Print dropdown list, you can then select whether to PDF all pages in the specified range or only the odd or even pages.



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

8. Click OK, specify the name and location for the PDF file and click Save. The document is converted to PDF.

To convert a closed document to PDF:

Right-click the closed Microsoft Word, Excel or PowerPoint file on your desktop or DMS and select Convert to PDF with Workshare. The *Create PDF* dialog is displayed. Continue as described in the procedure above.

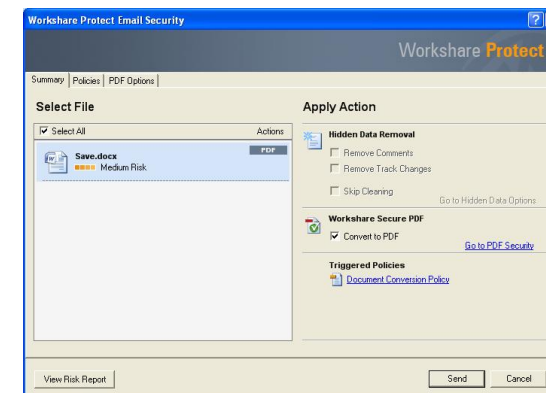
PDF and Emails

Workshare Professional provides organizations with the ability to enforce PDF creation on documents leaving the organization through policy rules. Your system administrator can create policies that contain certain pre-defined policy triggers that force you to convert documents to PDF when they are sent by email.

Additionally, Workshare Professional enables you to quickly and easily convert open Microsoft Word, Excel and PowerPoint documents into PDF and send them by email. Before Workshare Professional converts the document, you can select to remove sensitive hidden data from the document.

To convert attachments to PDF:

1. When you send an email that triggers a PDF action, Workshare Professional notifies you that your attachment(s) will be converted to PDF.




If your administrator has enabled you to override the PDF settings and you do not want to PDF the attachment(s), you can deselect the Convert to PDF checkbox.

2. Click Go to PDF Security to display the different PDF conversion options.

3. Select one or more of the security options individually or select the Full Security checkbox to select them all. The security options include preventing recipients from printing, editing, copying from or adding comments to the PDF attachment.
4. If required, set a password for access to the PDF security settings by entering the password twice in the relevant fields.
5. Repeat steps 3 to 4 for additional attachments to specify individual PDF settings for each attachment if required.
6. Click Send to send the email. Workshare Professional converts the attachments to PDF and applies your settings before sending the email.

To convert documents and email:

1. Open your document in Microsoft Word, Excel or PowerPoint and click the Convert to PDF and email button  in the toolbar (MS Office 2003/XP) or select PDF Email in the *Workshare* tab, Secure group (MS Office 2007). The *Create PDF* dialog is displayed.
2. Follow the procedure to create a PDF as described in steps 2 to 8 above.
3. After specifying a save location and clicking Save, an email message window is displayed with a PDF of the open document as an attachment.
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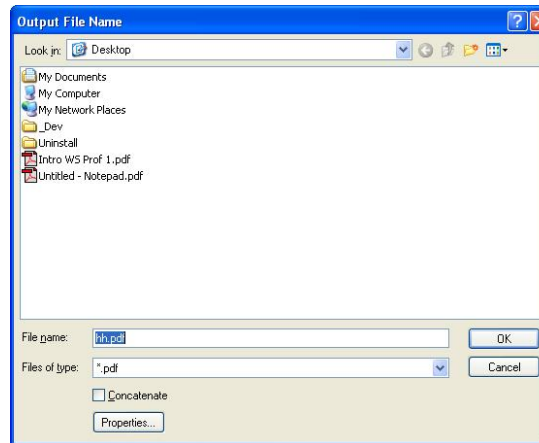
PDF Anywhere

Workshare enables you to create and combine PDF files from any application, for example, an email application, a browser or Notepad. You can convert to a new PDF file or you can append to an existing PDF file.

To convert to PDF from anywhere:

1. Click Print in the application.
2. In the *Print* dialog, select Workshare PDF Publisher as the printer.


3. Specify other settings as required and click Print. The *Output File Name* dialog is displayed.



4. Specify a name for the PDF in the File name field or, if you want to add to an existing PDF, select the Concatenate checkbox and browse to and select the existing PDF.
5. Click OK. The open document is converted to PDF and saved as specified or added to an existing PDF.

PDF to Word Conversion

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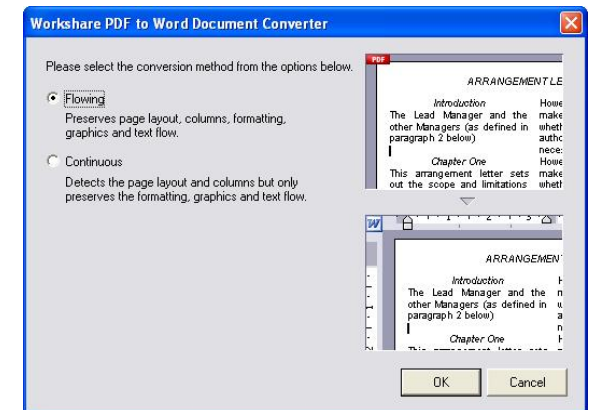
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 - From Microsoft Word 2007, click the Office Button and select Open. Browse to the PDF file and click Open.

The Workshare PDF to Word Document Converter dialog is displayed.



2. Select a conversion method according to how much of the formatting and layout you want to preserve and click OK. The PDF document is converted to DOC format and is opened in Microsoft Word.

 *Note: The name in the title bar will still include the PDF extension. However, the document is in DOC format.*

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