

REPORTING AND COMPLIANCE

Reporting and Compliance

Workshare Professional offers reporting functionality. There are many benefits to this feature as it provides audit visibility by reporting on a document's activity, history and risk. This facilitates secure document compliance. Reports are generated using the easy to use and efficient Workshare Professional Report Wizard.

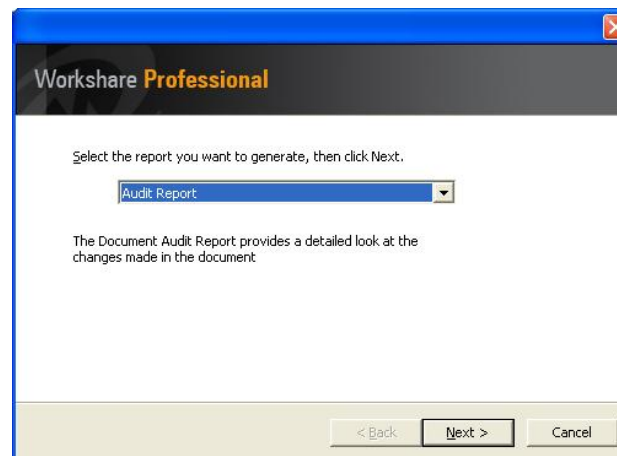
Generating Reports with the Report Wizard

The Report Wizard enables you to quickly and easily generate reports analyzing your documents. There are four different types of report and you can generate them in a number of formats including HTML, PDF or even raw XML, allowing you to use the data in your own style sheets.

Report Type	Description
Audit	Provides a detailed look at the review cycle including information about changes proposed to the document by each reviewer and their status (applied, rejected, flagged) as well as details of when the document was sent for review and the names and email addresses of the recipients.
History	Provides historical data on when a document was sent for review, recipient details, when responses were received and when changes were incorporated.
Review	Provides a PDF document that includes Redline documents showing changes that have been suggested to a document during the review process.
Risk	Provides a list of the content risk in a document that details a full account of the different types of hidden data in a document as well as the potential content policy violations

To access the Report Wizard:

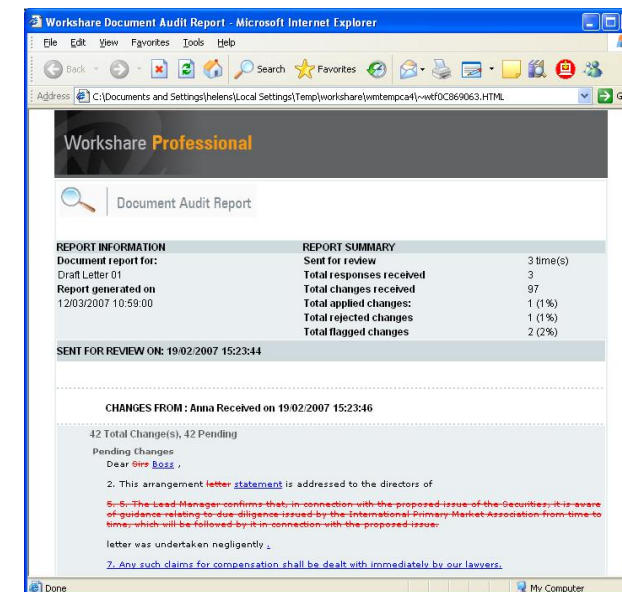
The Report Wizard is accessed by selecting Report Wizard in the *Workshare* menu (MS Word 2003/XP) or by selecting Reports in the *Workshare* tab (Word 2007).



WORKSHARE PROFESSIONAL QUICK REFERENCE

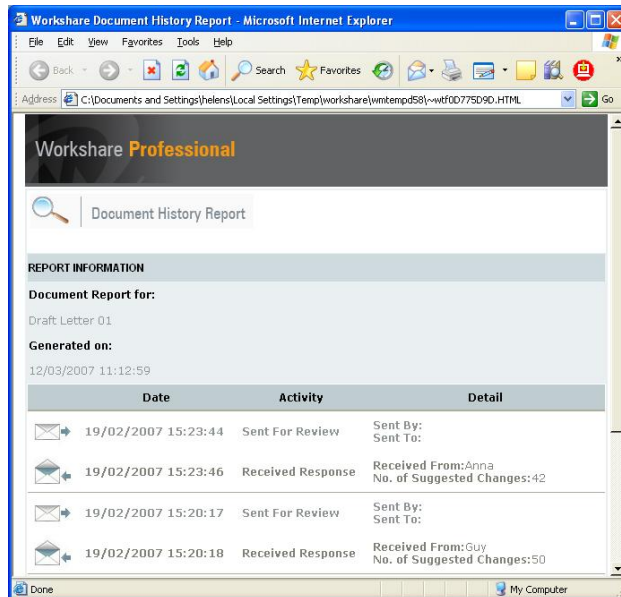
To generate an audit report:

1. Open the document for which you want to generate a report and open the Report Wizard.
2. In the Report Wizard, select Audit Report from the dropdown list and click Next.
3. Select the format of the report, HTML or XML, and click Next. The report is generated and once complete, a confirmation page is displayed.
4. Click Finish to display the report. An example HTML Audit report is shown below:



To generate a history report:

1. Open the document for which you want to generate a report and open the Report Wizard.
2. In the Report Wizard, select History Report from the dropdown list and click Next.
3. Select the format of the report, HTML or XML, and click Next. The report is generated and once complete, a confirmation page is displayed.
4. Click Finish to display the report. An example HTML History report is shown below:

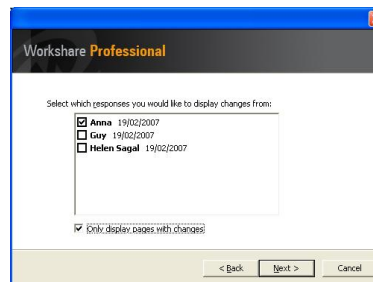


To generate a review report:

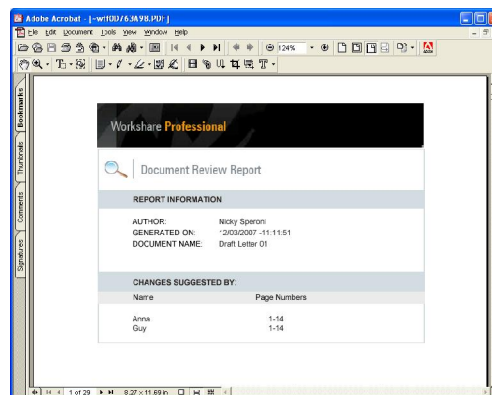
1. Open the document for which you want to generate a report and open the Report Wizard.
2. In the Report Wizard, select Review Report from the dropdown list and click Next.



Note: You can also generate a Review report by selecting Print Reports from the Actions dropdown menu in the Manage Changes page of the Workshare Panel.



3. Select which responses you want to include in the report. The responses are Redline documents (comparisons) that show the changes proposed by a reviewer.
4. If required, select the Only display pages with changes checkbox to exclude pages from the comparison that do not have any proposed changes.
5. Click Next. The report is generated and once complete, a confirmation page is displayed.
6. Click Finish to display the report. An example PDF Review report is shown below:



To generate a risk report:

1. Open the document for which you want to generate a report and open the Report Wizard.
2. In the Report Wizard, select Risk Report from the dropdown list and click Next.



Note: You can also generate a Risk report by clicking Report in the Content Risk page of the Workshare Panel.

3. Select the format of the report, HTML or XML, and click Next. The report is generated and once complete, a confirmation page is displayed.
4. Click Finish to display the report. An example HTML Risk report is shown below:

