

Workshare Professional Module Installation Guide

WORKSHARE

THE LEADER IN SECURE CONTENT COMPLIANCE

Company Information

Workshare Professional Module Installation Guide

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About This Guide

This *Workshare Professional Module Installation Guide* provides an overview of the modules that make up Workshare Professional, describing the functionality available with each, and describes how to install modules individually and add or remove modules at a later time.

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Chapter 1. Introducing Workshare Professional

Workshare Professional is a desktop application that automates managing changes to business documents as well as protecting against unauthorized content disclosure. Workshare Professional is designed for the way that you work – within Microsoft Office. Workshare Professional integrates with your existing desktop productivity software Microsoft Word, Excel and PowerPoint and your email applications such as Microsoft Outlook or IBM Lotus Notes. In addition, many companies use Document Management Systems (DMSs) to track and store key documents and Workshare Professional integrates out of the box with several leading DMSs.

Workshare Professional provides:

- Fast and accurate multi-party document review
- Elimination of version/master proliferation and confusion
- Fast and accurate document comparison including “one-to-many” comparison
- Policy-driven content risk management and PDF conversion
- Discovery and removal of hidden data and visible content leaks
- Secure PDF conversion anywhere and on email send
- Extended and secured document control over email and portals
- Accurate conversion of PDF files to Microsoft Word files

Workshare Professional Functionality

Workshare Professional functionality is separated into modules that can be included in or excluded from an installation as required. The modules are as follows:

- Review and Audit
- Compare
- Protect

You purchase your Workshare license according to the modules you require.

Review and Audit Module

The Review and Audit module in Workshare Professional enables you to manage changes to business documents rapidly and easily. It reduces frustration and delays by finding and incorporating changes in important documents.

When you have the Review and Audit module installed, you can:

- Send a document for review to one or many reviewers
Workshare Professional enables you to easily send a document to several people.
- Receive responses back from reviewers
When a document is sent using Workshare Professional, it is 'tagged' so that when colleagues return a changed document to you via email, Workshare Professional recognizes the revised document as a revision to your original.
- Import responses into the original review document and instantly see any changes proposed
Whenever any attachments that contain suggested changes to your documents are opened from your email, Workshare Professional automatically analyzes the documents for suggested changes. Workshare Professional identifies all changes made to the document, regardless of whether the reviewer used track changes or not.
- Apply or reject changes proposed by reviewers as required
Workshare Professional provides an intuitive and simple way to review, understand, and incorporate changes to a Microsoft Word document. Multiple suggestions from several people are presented in a concise consolidated view within Microsoft Word. This consolidated view enables you to act upon each change - to apply, reject, or flag for follow-up.
- Convert PDF files to DOC format
Workshare Professional enables you to quickly and easily convert PDF files into Microsoft Word files from within Microsoft Word and by right-clicking closed PDF files on your desktop or DMS.

Compare Module

The Compare module in Workshare Professional enables you to compare documents and instantly see any differences between them.

When you have the Compare module installed, you can:

- Compare a document against a previous version or against another document entirely
Understanding differences between one version of a document and the next is a critical function when editing and reviewing documents in multi-user environments. You can compare single documents from within Microsoft Word or using the Workshare Compare application.

- Compare a document against multiple documents
Workshare Professional performs comparisons accurately and seamlessly even in complex situations where a document may have several previous versions. You can compare a document with multiple documents using the Workshare Compare application.
- Compare DOC files and PDF files
You can compare DOC with DOC or PDF with PDF or DOC with PDF from within Microsoft Word or using the Workshare Compare application.

Protect Module

The Protect module in Workshare Professional provides comprehensive content risk protection enabling the discovery and removal of hidden sensitive data as well visible sensitive data. Content risk is defined in security policies. Hidden data may include information such as track changes, author's name, server names, keywords, routing slips and authoring trails. Visible sensitive data may include financial information, social security numbers, credit card numbers or profanity.

When you have the Protect module installed, you can:

- Discover content risk in open Microsoft Office documents
Workshare Professional integrates with Microsoft Office providing an option to display a comprehensive report of all the content risk in a document while it is open in Microsoft Word, Excel and PowerPoint. Content risk is displayed according to its risk level (high, medium, low).
- Remove content risk from open Microsoft Office documents
Once you have discovered the content risk in Microsoft Office documents, you can remove selected types of hidden data as required.
- Receive alerts when open Microsoft Office documents contain content risk
Workshare Professional can be configured so that when open Microsoft Office documents trigger a breach of a security policy, a real-time policy alert in the bottom right of the screen or a smart tag notifies you of the policy breach.
- Exercise control when an email or its attachment contains content risk
Workshare Professional prevents you from accidentally emailing confidential information by alerting you before the email is sent when an email or its attachment breaches security policies. Depending on the actions defined for policy breaches, emails may be blocked, sensitive data removed, attachments can be zipped or converted to PDF. Security policies can specify different actions when a document is sent internally or externally.
- Restrict access to sensitive documents through classification
Classification levels such as "For Internal Use" or "Confidential" can be applied to documents so they can then be prevented from being emailed either to any user, or to external users.

- **Convert DOC files to PDF**
Workshare Professional enables you to quickly and easily convert Microsoft Office documents into PDF (Portable Document Format) from within Microsoft Office environments and by right-clicking closed files on your desktop or DMS.
- **PDF Anywhere**
Workshare Professional enables you to create and combine PDF files from any application, for example, an email application, a browser or Notepad.

Chapter 2. Installing Workshare Professional

Workshare Professional can be installed on a single workstation or deployed across a network. It can be installed to work with your local file system or with your DMS. This guide describes how to install Workshare Professional to work with your local file system on a single workstation. For a complete description of all installation options, refer to the *Workshare Professional Installation Guide*.

The installation process includes a step where you can select which specific Workshare Professional modules you want to install.

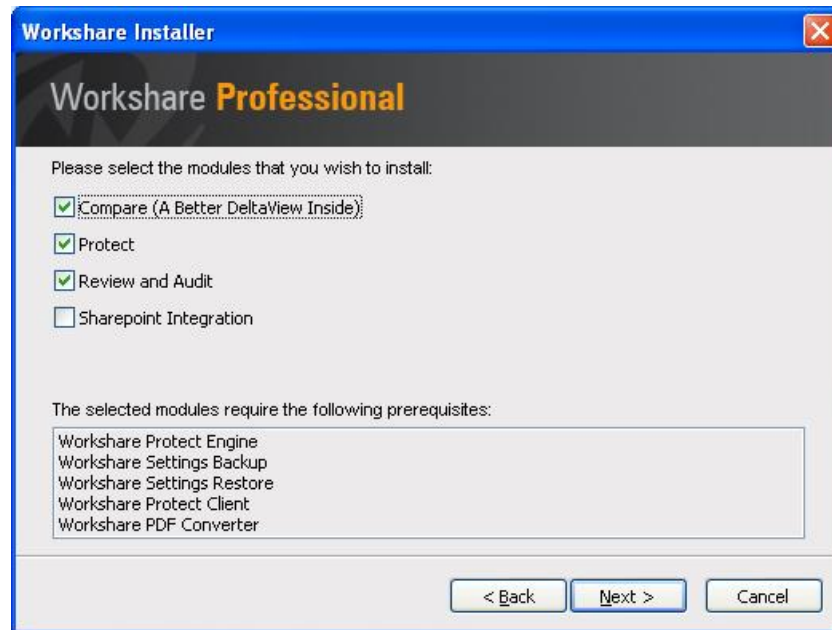
Installing All Workshare Professional Modules

Before beginning the installation procedure, make sure that all other programs are closed and disable any anti-virus software.

To install Workshare Professional modules:

1. Double-click WorkshareInstall.exe (or WorkshareHummingbird.exe or WorkshareInterwoven.exe depending on your DMS). The Workshare Installer is displayed.
2. Click Next. The License Agreement screen is displayed.
3. Read the agreement and select the I accept the terms of this agreement checkbox.

4. Click Next.



Note: After installation, you can install/uninstall specific modules of Workshare Professional by running the WCA from the Windows Start menu. Refer to *Modifying Module Installation*.

5. Select the modules you want to install and click Next. Workshare Professional creates the necessary folders and copy files. If you are integrating Workshare Professional with a DMS, the DMS integration module files are also installed. The installation process may take a few minutes. A progress bar indicates the progress of the installation.
6. After this process is completed, click Finish. This completes the installation of Workshare Professional. You are now able to start using Workshare Professional. For a full description of the Workshare Professional functionality, refer to the *Workshare Professional User Guide*.



Note: Ensure that the system user has write access to the policy sets folder - Documents and Settings/All Users/Application Data/Workshare/Protect Enterprise/PolicySets.

Modifying Module Installation (Partial Installs)

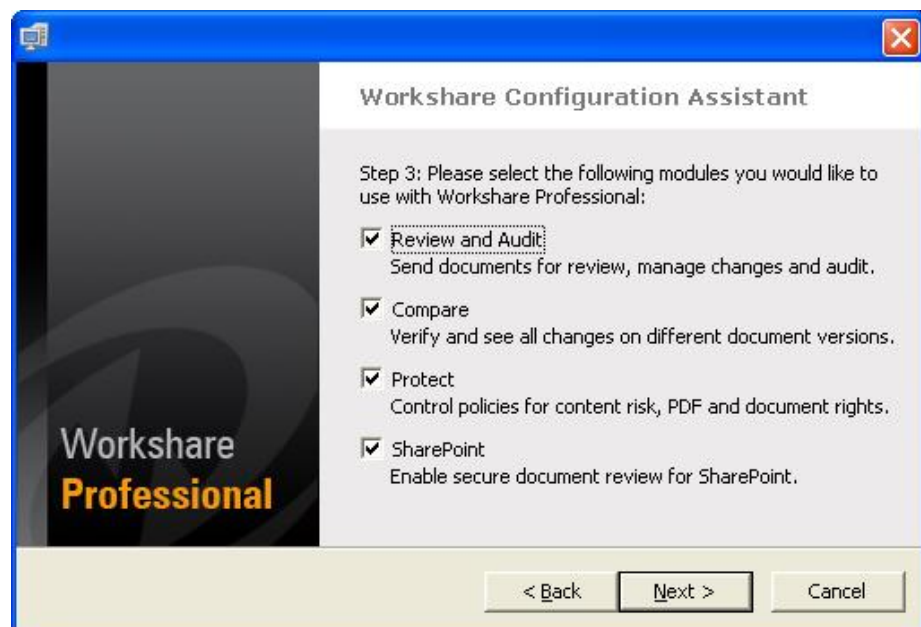
You can change the Workshare Professional modules you have installed at any time by re-running the Workshare Configuration Assistant (WCA).



Note: You can only install modules for which you have a license. Please refer to Workshare Customer Support for information on licensing.

To re-run the WCA:

1. From the Windows Start menu, select Programs > Workshare < Workshare Configuration Assistant. The WCA is automatically launched and performs a number of system checks. Once the checks are completed, the licensing screen is displayed.
2. If you have previously licensed Workshare Professional, click Next to continue. If you have not yet licensed Workshare Professional or you want to change your license details, click Add Additional Authorization Code and enter your license authorization code into the required field. Click Next to validate the code.
3. Depending on your license, the WCA displays the Workshare modules available for installation.



4. Use the checkboxes to deselect the modules that you no longer require and select the modules you want to install.

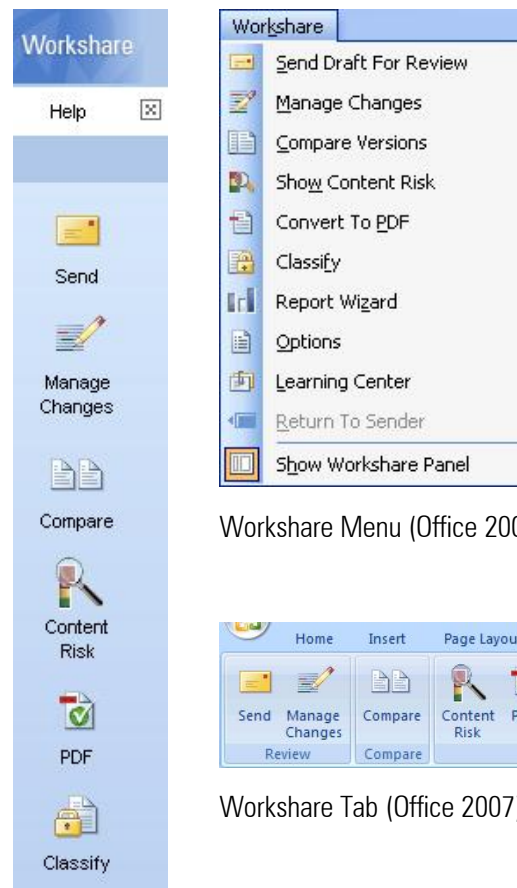
5. Click Next. The WCA registers the necessary components on your system. When this is completed the WCA runs diagnostic checks on your system.
6. When the checking process is finished, click Next.
7. Click Finish.

Chapter 3. Module Functionality

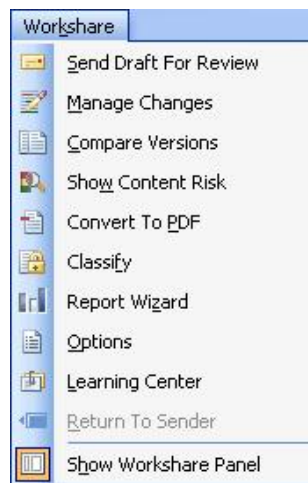
The installation of specific Workshare Professional modules determines what functionality is available in the Workshare Panel and what functionality is enabled in the Workshare menu or Workshare Ribbon.

All Modules

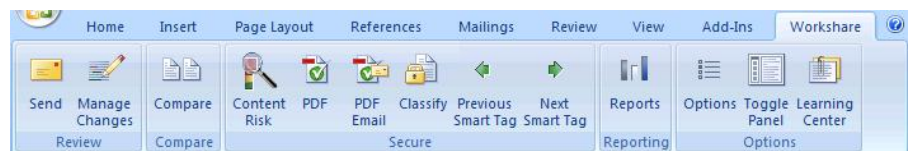
You can combine modules in any way and install one, two or three modules as required. When all modules are installed, the Workshare Panel in Microsoft Office and the Workshare menu/Workshare tab in Microsoft Word are displayed as follows:



Workshare Panel



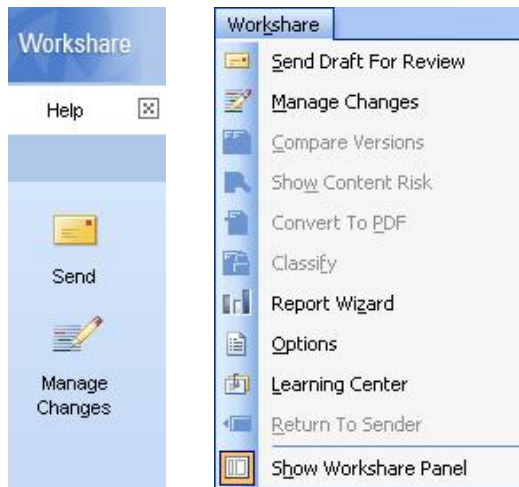
Workshare Menu (Office 2003/XP)



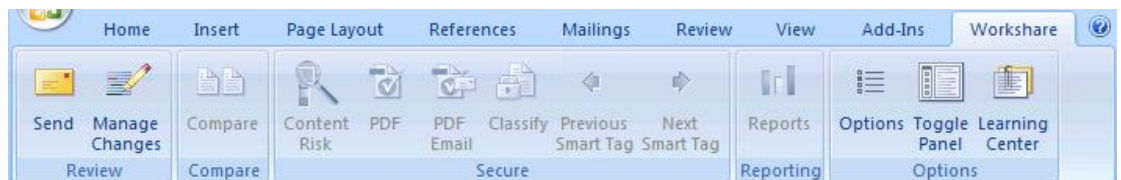
Workshare Tab (Office 2007)

Review and Audit Module

When only the Review and Audit module is installed, the Workshare Panel, Workshare menu and Workshare tab are displayed in Microsoft Word as follows:



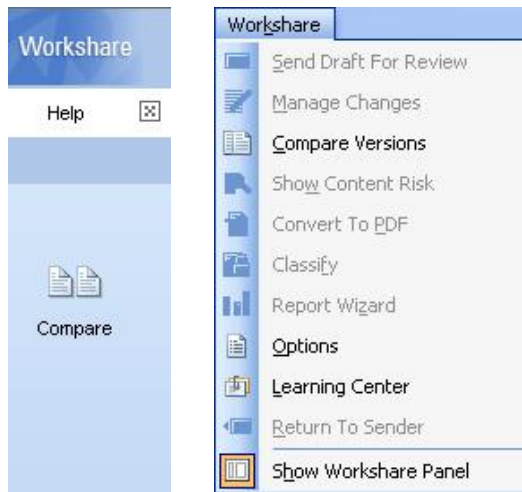
Workshare Panel Workshare Menu (Office 2003/XP)



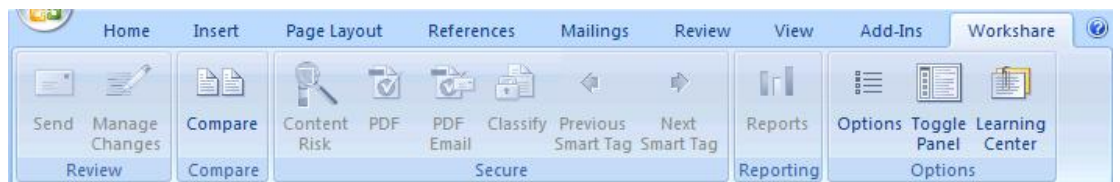
Workshare Tab (Office 2007)

Compare Module

When only the Compare module is installed, the Workshare Panel, Workshare menu and Workshare tab are displayed in Microsoft Word as follows:



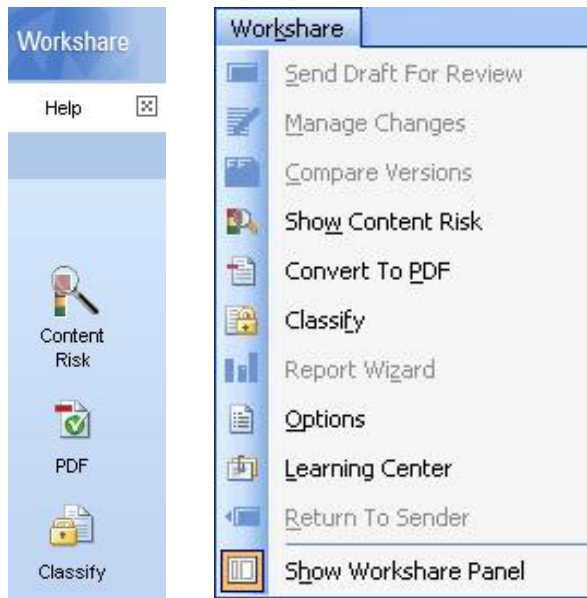
Workshare Panel Workshare Menu (Office 2003/XP)



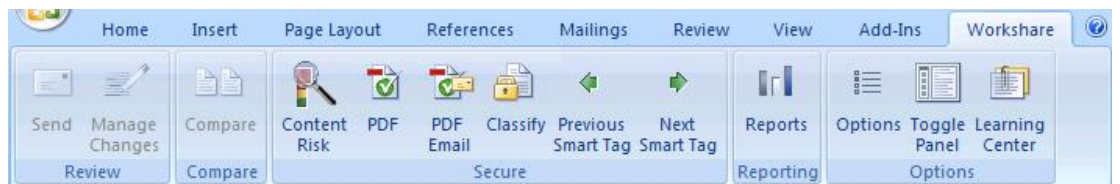
Workshare Tab (Office 2007)

Protect Module

When only the Protect module is installed, the Workshare Panel in Microsoft Office, the Workshare menu and the Workshare tab in Microsoft Word are displayed as follows:



Workshare Panel Workshare Menu (Office 2003/XP)



Workshare Tab (Office 2007)