

# WORKSHARE PROTECT 9

## Release Notes



## Table of Contents

What is Workshare Protect.....	3
What's New in Workshare Protect 9.....	3
Office 64-bit support .....	3
Install .....	4
Protect – additional Exclude Metadata parameters .....	4
Interactive Protect customization .....	5
Interactive Protect – automatic apply .....	6
Interactive Protect – PDF individual attachments .....	6
Protect – sending large files.....	7
Protect – manage permissions.....	7
Protect - links shortcut .....	8
Save/share to Workshare online from Microsoft Office.....	8
Workshare desktop app .....	9
Workshare online inside Office .....	9
NetDocuments integration .....	10
Click-to-run certification .....	10
Licensing change.....	10
Options removed .....	11
System Requirements.....	12
Certified environments for Workshare Protect 9 (32-bit version) .....	12
Certified environments for Workshare Protect 9 (64-bit version) .....	14
Important Information.....	16
Important installation information .....	16
Change Requests Fixed.....	16
Known Issues .....	30
Contact Info .....	32

## 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

Workshare Protect 9 includes the following new features:

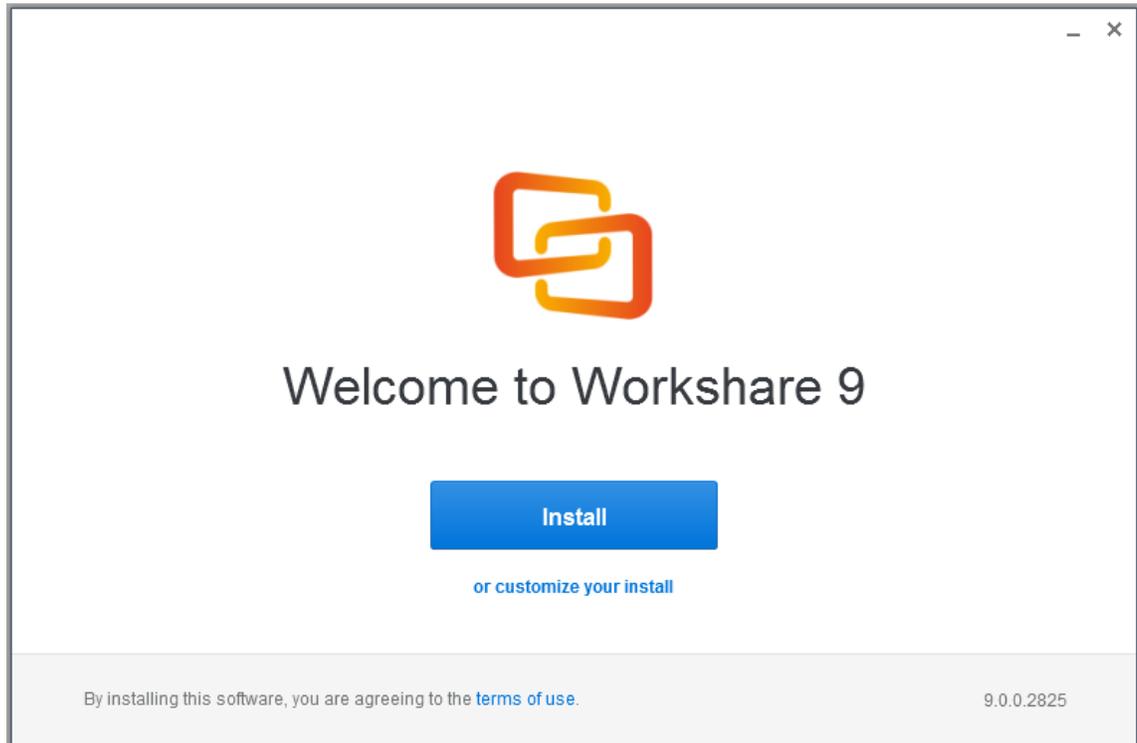
### Office 64-bit support

This release includes a full 64-bit version of Workshare Protect 9. This is a 64-bit application that includes the full feature set of Workshare Protect. Full system requirements are provided on page 14.

## Install

Workshare Protect 9 installs more smoothly with less user interaction required and installs fewer add-ins. For example, in Outlook, there is only one add-in and in Word, there are only two add-ins.

There is also rebranding and new messaging on the installation screens.

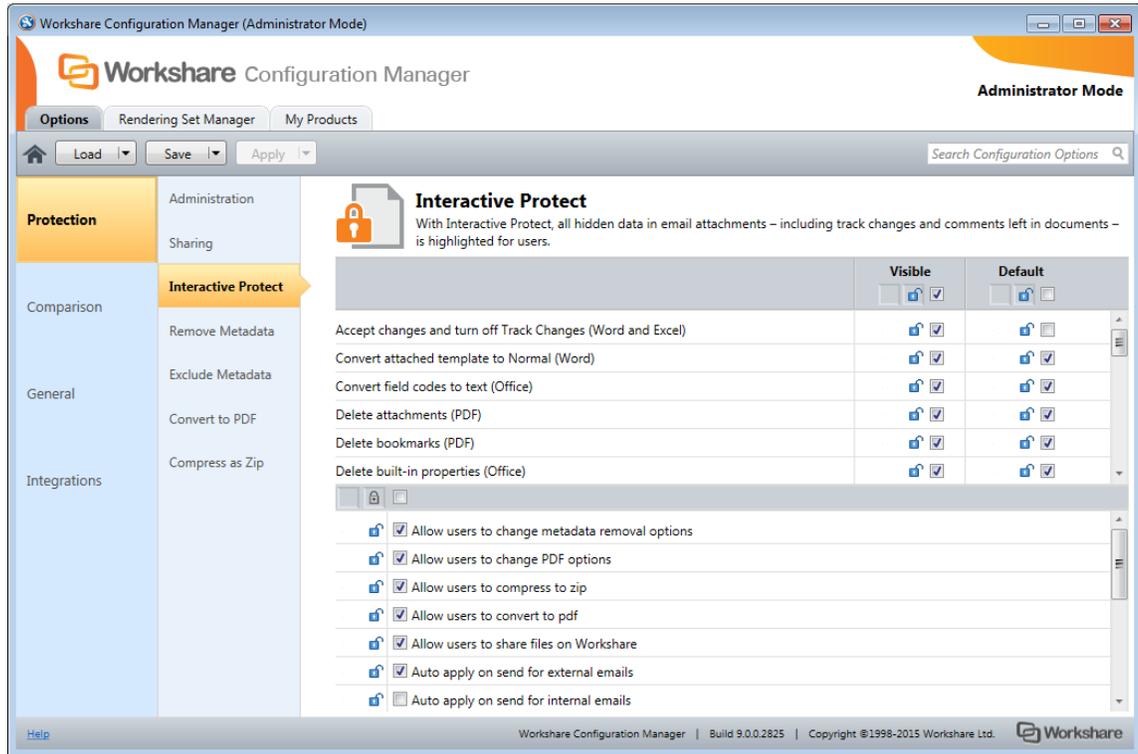


## Protect – additional Exclude Metadata parameters

The **Protection>Exclude Metadata** parameters enable you to exclude certain types of metadata from being removed when documents are cleaned. The types of metadata that can be excluded from cleaning are custom properties and field codes from Office documents and now markups from PDF files. When cleaning, the user can still select to clean these types of metadata and all custom properties, field codes or markups will be cleaned, except for the ones explicitly excluded in **Protection>Exclude Metadata**. These parameters apply when Workshare Protect is cleaning attachments (using Interactive Protect, the Protect Profile dialog or the Email Security dialog) as well as cleaning open Microsoft Office documents. The two new parameters are **Exclude Annotation Links (PDF)** and **Exclude Annotation Widgets (PDF)**.

## Interactive Protect customization

There is a new category in the Workshare Configuration Manager – **Protection > Interactive Protect** – dedicated to Interactive Protect. In both User and Administrator mode, you can set which metadata will be visible in the Interactive Protect panel and whether it will be selected and cleaned by default.



In addition, administrators can set:

- What specific areas are available to users in the Interactive Protect panel and whether users can change settings in those areas – for example, Administrators can hide the **Convert to PDF** section or leave it visible but not allow users to change options within it.
- To automatically apply Interactive Protect settings even when the user does not click **Apply**.
- When to automatically display the Interactive Panel.

## Interactive Protect – automatic apply

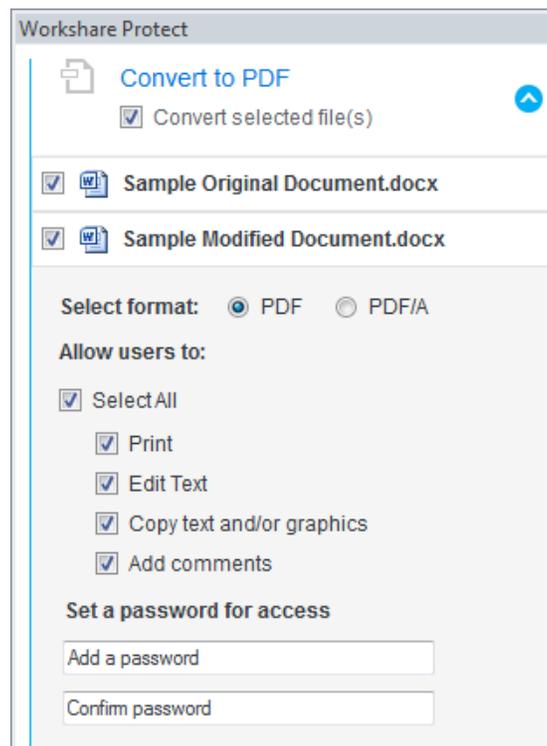
Previously, when the user did not click **Apply** in the Interactive Protect panel, the default profile would be applied to the attachments. Now, if the user does not click **Apply**, one of two things could happen:

- If the parameter to automatically apply on send is selected in the Workshare Configuration Manager (**Protection>Interactive Protect** category), the Interactive Protect settings made in the panel will still be applied when the user clicks **Send**.
- If the parameter is not selected, no processing will occur.

*Note: The **Auto apply on send for external emails** parameter is selected by default and the **Auto apply on send for internal emails** parameter is NOT selected by default.*

## Interactive Protect – PDF individual attachments

With Protect 9, you can now select to convert individual attachments to PDF in the Interactive Protect panel rather than selecting to convert all or none.



Finally, the Interactive Protect panel now display in the main Outlook window as well as the message window.

## Protect – sending large files



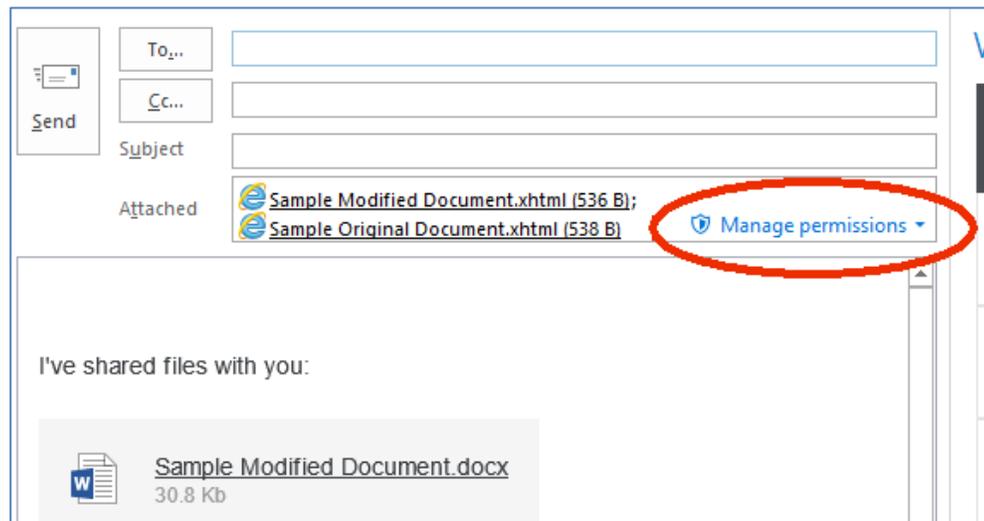
The Add Large Attachment button is now called **Attach as Link** and it is displayed by default. Use the **Attach as Link** button to save a large file to a folder in Workshare and send recipients a link to the location.

Interactive Protect can be configured to automatically send a link to files when an attachment exceeds a specified size. In this scenario, as soon as you attach a file above the specified size, they are automatically converted to links. This is configured in the Workshare Configuration Manager (**Protection > Sharing** category) by specifying a value for the **Automatically convert to link(s) when total attachment size exceeds (MB)** parameter.

Interactive Protect can also be configured to automatically select the convert to link option in the Interactive Protect panel when an attachment exceeds a specified size. In this scenario, as soon as you attach a file above the specified size, the **Replace all attachments with a link** checkbox in the **Convert to link** area is selected when the Interactive Panel displays. This is configured in the Workshare Configuration Manager (**Protection > Interactive Protect** category) by specifying a value for the **Automatically select 'Convert to link' when total attachment size exceeds (MB)** parameter.

## Protect – manage permissions

When you upload attachments to Workshare and send recipients links to the files in Workshare, you can set access permissions for the Workshare folder. For example, you can specify that access to the folder will expire after a certain date or that members of the folder can only view files and not download. Now you can modify those permissions after converting attachments to links but before sending your email using the Manage permissions option in the attachments bar.



## Protect - links shortcut

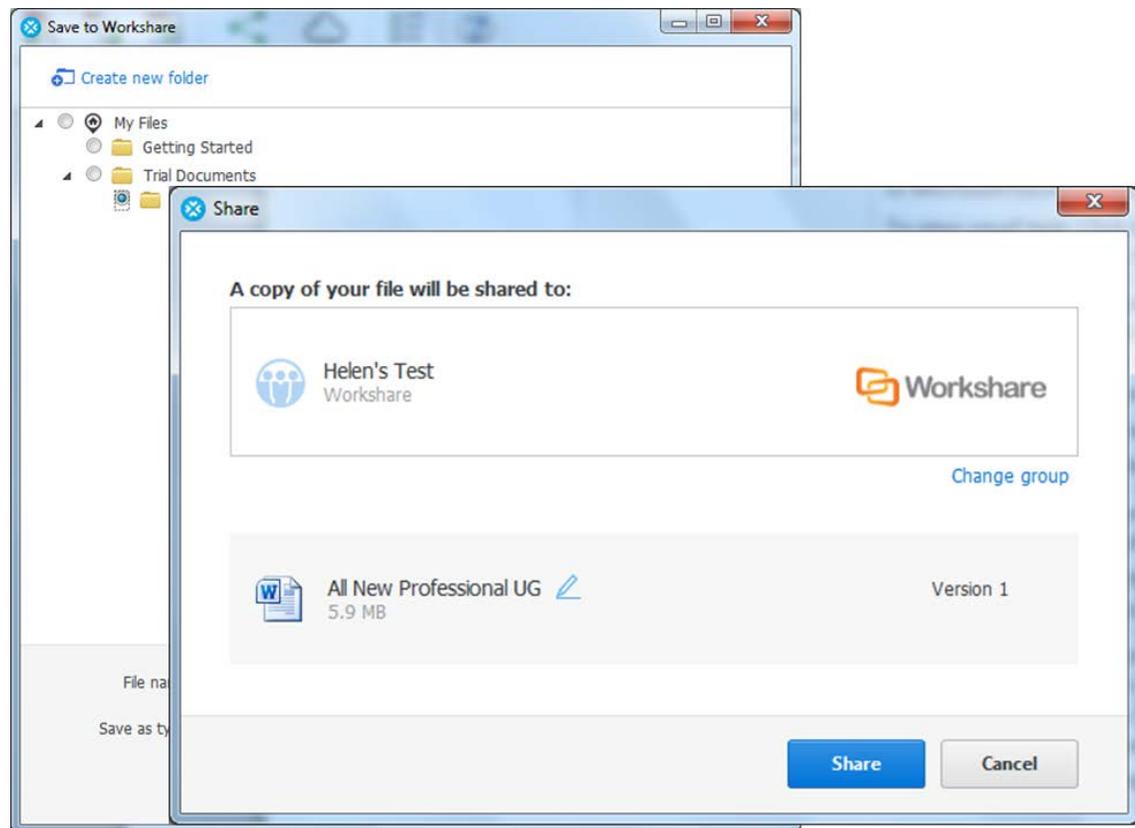
Whatever the Protect user experience set up in your environment, when you have a shortcut on the attachment bar, you can convert your attachments to links in a single click.

This is configured in the Workshare Configuration Manager (**Protection > Sharing** category) by selecting the **Display Link on attachments bar** parameter.

## Save/share to Workshare online from Microsoft Office

With the Connect element installed, you can save your Office documents to Workshare online so they will be accessible to you online at all times and you can share your files to groups in Workshare online so you can collaborate on them with others.

You can save and share Word, Excel and PowerPoint files in their native format or converting them to PDF as you save or share. The file is shared to a group in Workshare and a link to the file is sent to group members by email.



## Workshare desktop app

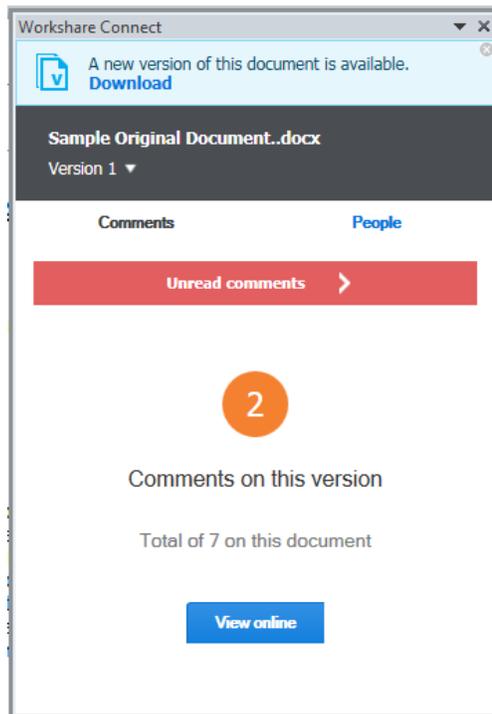
The installation of the Connect element includes an updated desktop app - the application that syncs content between Workshare online and your desktop. This means that even when offline, you can access and review your Workshare content. You can also add updated files or new files and as soon as you are online again, they will be synced.

If your Protect installation is integrated with a DMS, the desktop app benefits from this integration too. This means, for example, when adding files to the desktop app, the default open location will be the DMS. This can be switched off in Preferences in the desktop app.

The desktop app is launched after installation of Protect and you sign in to Workshare once to retrieve license information and begin synchronization. A welcome page is displayed in desktop app.

The interface of the desktop app is very similar to that seen when accessing my.workshare.com through a browser.

## Workshare online inside Office



With the Connect element installed, you can display the Workshare Connect panel inside Office which provides a window into your shared documents in Workshare online. When you have shared a document into a collaborative workspace in Workshare online and you open the document locally, the Workshare Connect panel provides a view of what is happening with your collaboration. You can see the other reviewers (who you shared the document with) and whether they are online at the moment. You can also see how many comments have been made on the document and whether any new versions have been added to it. With a single click you can open the document in the Workshare web app and join in the collaboration by viewing comments and making your own comments.

When another reviewer adds a new version of the document, you are notified in the Workshare Connect panel. With a single click, that new version is opened in Word. Now the Workshare Connect panel will ask if you'd like to see what's different between this new version and the previous version. With a single click, both versions are compared in Workshare Compare.

## NetDocuments integration

The NetDocuments integration now includes the ability to convert documents to PDF from within NetDocuments using the send to application functionality.

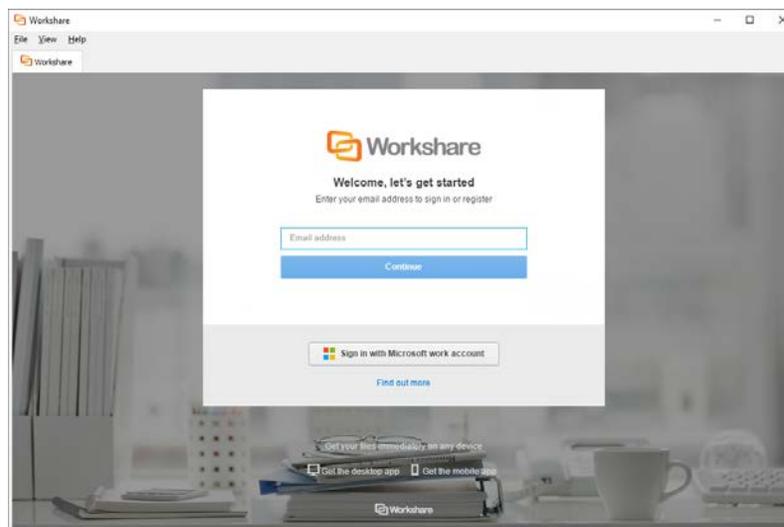
## Click-to-run certification

Workshare 9 is now certified with Microsoft's click-to-run. Click-to-run is a Microsoft streaming and virtualization technology that is used to install and update Office products.

## Licensing change

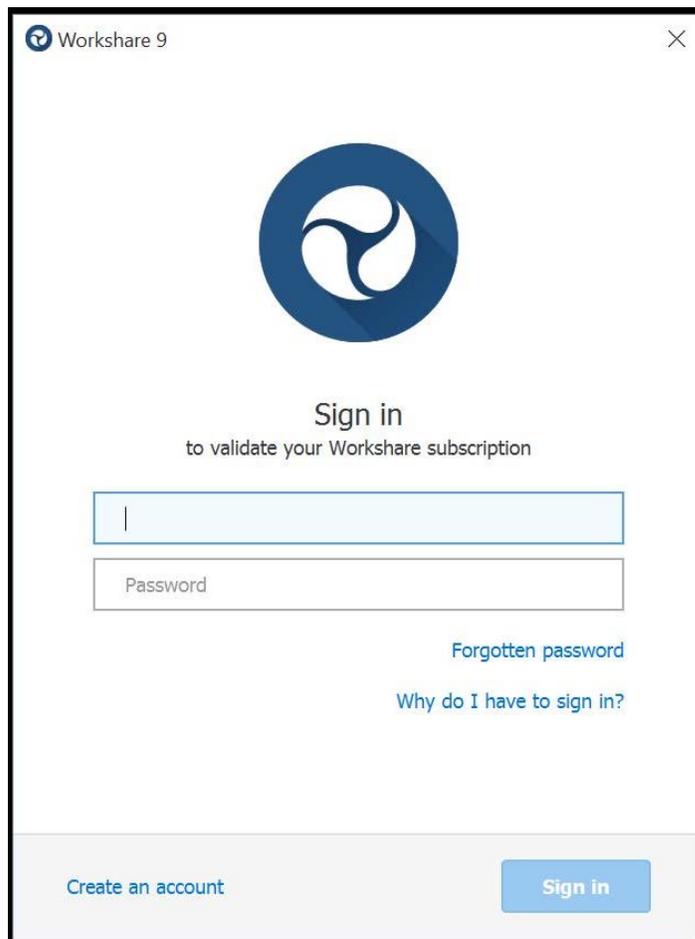
Licensing of Workshare is done via my.workshare.com. When purchasing a Workshare product, you are required to create a Workshare account. A license entitlement is created and assigned to the account, waiting to be used. After installation, you are prompted to log in to your Workshare account in order to retrieve your license entitlements. This can be in either of the following ways:

- When File Share & Sync (the Connect element) is included in the installation, the Workshare desktop app is launched after install and you will see the following:



If you do not log in at this point, then.....

- The first time you access Workshare functionality, for example, by clicking any option in the Workshare tab, you will see the following:

A screenshot of a web dialog box titled "Workshare 9" with a close button in the top right corner. The dialog features the Workshare logo, a "Sign in" heading, and a sub-heading "to validate your Workshare subscription". Below this are two input fields: the first is empty, and the second is labeled "Password". There are two links: "Forgotten password" and "Why do I have to sign in?". At the bottom, there is a "Create an account" link on the left and a "Sign in" button on the right.

Enter your Workshare credentials (email address and password) and click **Sign in**. Your license entitlements are retrieved and you have access to all Workshare functionality. This is the only time a user is required to log in to Workshare.

## Options removed

Some options that were previously available in Protect have been removed because the functionality is now available in a better and more accessible way. You will no longer see:

- Vertical Workshare panel in Office
- Redact
- Displaying content risk inside the Workshare panel in Word

## System Requirements

The system requirements for Workshare Protect 9 are as follows:

<b>Minimum System Requirements</b>	Intel Pentium 4 3.2GHz processor 1.5GB RAM 1GB free disk space
<b>Recommended System Requirements</b>	Intel Core 2 DUO @ 2.2GHz AMD Athlon 64 X2 4400+ 2GB RAM 2GB free disk space

## Certified environments for Workshare Protect 9 (32-bit version)

Workshare Protect 9 (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](mailto:support@workshare.com)) for any help.

For details of which environments previous versions of Workshare 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 (64 bit)
  - Citrix XenApp 7.5
  - Citrix XenDesktop 7.5
- With Microsoft Windows Server 2008 R2 SP1 (64 bit)
  - Citrix XenApp 6.5
  - Citrix XenDesktop 6.5
  - Citrix XenDesktop 5.6

**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 2013 (32 bit) + Japanese
- Microsoft Office 2010 SP2 (32 bit) + Chinese Simplified & French
- Microsoft Office 2007 SP3 (32 bit)

**Email System:**

- Microsoft Outlook 2016 (32 bit)
- Microsoft Outlook 2013 SP1 (32 bit) + Japanese
- Microsoft Outlook 2013 (32 bit) + Japanese
- Microsoft Outlook 2010 SP2 (32 bit) + Chinese Simplified & French
- Microsoft Outlook 2007 SP3 (32 bit)
- IBM Lotus Notes 9.0.1
- IBM Lotus Notes 9.0

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

**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:**
  - FileSite 9.3.1
  - FileSite 9.3
  - FileSite 9.2
  - FileSite 9.0 Update 6
  - FileSite 9.0 Update 5 (+ EMM)
  - FileSite 8.5 SP3 Update 5/6
  - DeskSite 9.3.1
  - DeskSite 9.3
  - DeskSite 9.2
  - DeskSite 9.0 Update 6
  - DeskSite 9.0 Update 5
  - DeskSite 8.5 SP3 Update 5/6
- **OpenText:**
  - eDOCS DM 10
  - eDOCS DM 5.3.1 COM only (Patch 5)
  - eDOCS DM 5.3 COM only (Patch 5 Rollup 4 & 5)
- **Worldox:**
  - GX3
  - GX4

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

## Certified environments for Workshare Protect 9 (64-bit version)

Workshare Protect 9 (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](mailto:support@workshare.com)) for any help.

For details of which environments previous versions of Workshare 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**

**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:**

- FileSite 9.3.1 (64 bit)
- FileSite 9.3 (64 bit)
- DeskSite 9.3.1 (64 bit)
- DeskSite 9.3 (64 bit)

- **OpenText:**

- 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 <http://www.microsoft.com/downloads/details.aspx?FamilyID=889482FC-5F56-4A38-B838-DE776FD4138C&displaylang=en>.
- **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.

CR #	FB #	Description
00431065	19552	Local Open or Save dialog box does not appear in Excel
01041861	36415	Request the ability to set as default 'Retain attachments in Sent Item' option
01050670	38252	Cannot Save Attachment' error displayed when forwarding emails containing linked images in the signature
01059200	39974	Unable to send zip folder with nested msgs with attachments when using desktop profile or advanced dialog
01063259	40758	Unable to clean certain Word documents when 'Small text' metadata option is checked

CR #	FB #	Description
01065211	41047	Outlook crashes intermittently when emails are being sent with attachments externally
01067629	41605	Signature is lost when cleaning Word files using Interactive Protect.
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
01071356	42159	pcgREline Contents are removed from text Content Control boxes when 'Small Text' metadata is enabled
01072374	42251	Error when sending email with or without attachment to multiple distributions list
01072628	42370	White field codes in footer cannot be cleaned
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 pwd protected PPT/X docs when a dot (.) and name/number before file extension
01073165	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
01073730	42950	Wrong attachment sent when same document name is in use
01078338	43345	Interactive Protect removes contents from DOCX docs when sending as attachments through Wordox or LFS
01066299	41355	Applocker blocking certain Workshare DLLs
01079468	43516	Error when converting Excel documents to PDF using advanced PDF security and metadata options
01076208	43060	Error creating PDF when selecting pages to convert to PDF
01075838	43055	Convert to PDF, saving or emailing as PDF takes a long time to complete in certain environments
01034329	35033	Batch cleaning replicates page numbers in Word when cleaning field codes
01061759	40460	'Remove metadata' option cannot be unchecked by default in Interactive Protect panel

CR #	FB #	Description
01058370	39770	'Do you want to save changes to this message?' dialog pops up when closing Outlook
01060865	40291	Print preview showing SFTLinkPermission XML code
01054960	39073	Cleaning particular combination of Word, Excel or PPT files results in unexpected cleaning for document properties in Word files
01047815	37364	RPC error when converting Office documents to PDF using Interactive Protect
01061739	40432	404 error page or file not found when using convert to link and sending to your own address
00141308	21453	Request to change wording of 'Hidden track change'
00148200	21360	Protect triggers when PAB contact name does not match Domino Directory
00160489	20804	Ability to hide/disable/password-protect Administrator Mode accessible from Workshare Configuration Manager (User Mode)
00161391	21451	Removal of "Email Address " option from the WCM
00161392	21451	Removal of "Email User Name " option from the WCM
00165075	21454	Request to honour 'Shared as' property when converting to PDF and saving as a related document
00167135	12021	Asian/Wingdings characters entered in email body when pressing backspace
00170258		Request for 'Advanced Options' to Reflect Options Set through Configuration Manager
00175397		Request for SharePoint Connector to Support SharePoint Server Farms
00180823	11725	Convert file dialog box is displayed when using 'Convert to PDF' option in Workshare ribbon
00181923		Request for Compatibility with Windows Server 2012 (and with R2)
00182223	12905	Delay of 2 to 3 minutes when sending message with lots of embedded images
00184524	14312	Request to rename Save dialog to OpenText instead of Hummingbird
00184554	14295	Attachments appear to disappear from emails when using EMM

CR #	FB #	Description
00239158	13272/ 11291	Incorrect formatting is displayed when PowerPoint documents are converted to pdf using 'Convert to PDF' option
00293932	18597	Error: An error occurred while executing the PDFClean action for the file
00316672	20560	Attachment duplicated when cleaning email with signature
00324286	22562	Unable to send DOCX document with a comma in the filename using Clean&PDF profile
00355918	17751	Request to integrate with IBM Notes 9 (Lotus Notes)
00370359	18227	Interactive Protect GUI Incorrectly Displayed When Text Size Is Set To 125%
00374333		Request ability to set 'Interactive Protect Panel behaviour' in the WCM
00374745	19796	Error message 'Contact your System Administrator ' Workshare has not been configured to send large files with current settings. Please either remove large file(s) or contact your System Administrator
00374827	18398	Ability to customize the email link text 'View these files using Workshare'
00374828		Ability to choose which file to convert to PDF
00375365	18636	Workshare Word Addin preventing word documents from switching
00377937	18638	Batch clean' options are not visible when changing text size in Windows
00388108	16240	Links & Images are broken if the advanced risk report is viewed in Google Chrome and Firefox
00407608		Ability to remove Convert to PDF or Compress all to zip options
00436493		Ability to convert to pdf and zip specific documents
00436591	19682	Unable to remove White text on other background colours
00436638	19684	White text on other background colours is removed when paragraph marks are inserted
00440597	19815	Disabling 'allow users to override option' prevents other settings to function
00440630	20265	Error Professional.Options.Exporter.Launcher.ex: has stopped working

CR #	FB #	Description
00440913		Request For Dynamic Interactive Protect Apply / Apply Changes Button
00443521	19962	Ability to send Word documents with document protection and convert to PDF without prompt to enter password in interactive protect panel
00460634	20246	An error occurred while executing the clean action for the file <.pptx>
00467149	20415	Emails are cleaned when options "Apply Workshare Protect" for internal and external Email are unchecked
00467186	20400	Zip files triggers select folder dialog box
00481282	20515	Autonomy iManage integration cannot be locked from editing in WCM
00482559	20516	Interactive protect takes long time to clean large files (14 MB)
00486524	20662	Equitrac is prompting when converting redline to PDF
00493349	20779	Unknown error 0x80131604 sending email after applying MS KB2863911 to Office 2013 SP0
00493363		Ability To Apply Interactive Protect Settings To 'Send' Button In Outlook
00494765	20859/ 24112	Legal Size Is Not Automatically Detected When Sending Redline As PDF, Changes To Letter
00498673	22332	Always show panel not honoured when adding a second attachment
00505239	22911	Ability To Select Certain Attachment For PDF Conversion.
00511746	21792	Ability to Reconcile Outlook sent items with original attachment rather than SFT Link.
00513139	21099	'Clean & PDF' profile causes workshare protect to hang
00513229	22311	Ability to turn On/Off/Show alert to specific metadata found using Interactive Protect
00513252	21147	Excel hangs when 'Workshare Ribbon Addin for Office' addin is enabled
00514621	21166	Adobe hangs when 'Workshare Outlook COM Addin' addin is enabled
00521205	21273	Content status built-in property is not removed from .xls files
00543116	21458	Send Link not triggers ZIP file when using custom policies

CR #	FB #	Description
00562245	21554	Shape colour changes to pattern when converting PPTX files to PDF
00597064	21575	Unable to clean password protected Excel workbooks
00610789	21697	Error Microsoft Outlook has stopped working
00619059	21831	Unable to send emails to Gmail addresses - Error in IAddrBook.OpenEntry
00652004	22025	Workshare Professional Attachments(s) Alert & Compare Addin causes Illegal characters in path error
00657181	22082	Error occurred while saving this file, please try again
00660039	22135	Error returned from a call to a com object - Interactive Protect
00662956	22180	Workshare was unable to create a reply. Ensure that your default mail program in internet explorer is set correctly
00662999	22183	Request to have alert message if the user makes changes in interactive protect and does not click apply button
00663051		Request to integration between protect Server and professional so that items cleaned in protect Server are not prompted in interactive protect
00682762	22558	PDF conversion forced if PDF/A is set as default
00684325	22661	Unchecking PDF/A option from advanced dialog box unlock the PDF security settings in WCM
00685757	22683	Error this command line is not available when cleaning small text
00685759		Request for send button to process metadata based on the state of interactive panel without clicking apply
00724148	23042	Error illegal characters in path when sending a zip file with Japanese characters
00732304	23124	Opening word attachment from outlook takes 20-30 seconds to load
00732402	22311	Ability to remove ZIP feature from Interactive Protect panel
00733808	22930	Metadata discovery not available for these files: DOCX, PPTX, XLSX
00735264	23250	Cross-references are removed when sending Word document and converting to PDF
00746265	23338	Error 'This command is not available' when cleaning hidden text

CR #	FB #	Description
00746297		Request to suppress interactive protect panel showing when inserting unsupported file types
00750458	23430	Error 'Range cannot be deleted' when cleaning hidden text
00755998	23471	Illegal characters in path error when converting Word documents to PDF
00773954	23574	An error occurred while executing the PDFclean clean action for the file
00776945	23744	Grammatical Error : A footer were detected in your attachments
00777003		Interactive panel remains after clicking apply
00777042	23825	Copy of emails remain in outbox folder when using send document from DeskSite
00777116	23918	Remove metadata option does not remain unchecked after clicking apply
00777117	23863	Grammatical errors displayed in the risk analysis pane
00778538	23878	Outlook hangs when sending certain pdf links
00778566	23941	Object reference error when sending email via 'Direct replies to' option
00780255	24024	Long delay emailing certain XLSX file(s)
00780404	24101	Clientprofiles policies are not honoured when 'Enable automatic generation of default profile' is disabled
00780440		An error occurred while executing the clean action for the file
00818704	24711	Excel document with hidden sheet crashes when using print option
00823080	24807	Autoprofiling error: Error description unknown error 0x80040157
	16358	PDF/A file is sent as PDF after cleaning metadata
	20735	Protect Files button is not enabled when we add encrypted zip file containing files in a folder
	22474	"Unable to clean" error is displayed while cleaning excel document through content risk option in Workshare ribbon
777006	23827	Workshare Ribbon Addin for Office causes Excel shortcut key dialog boxes to be hidden
	24073	Track changes are not cleaned in batch clean when Lightspeed clean is ON

CR #	FB #	Description
	24222	User is unable to perform Workshare Combine/Convert to PDF actions on shared encrypted Excel document
	24641	Password prompt appears again, while converting encrypted Excel/PowerPoint document to PDF with pages option enable
	25844	Document is corrupted while sharing encrypted documents through IP without applying Password on IP pane
	25901	Object Reference..' error banner is displayed while performing Share operations in new mail window
818673	26048	Images are not displayed
847353	26204	An error occurred while executing the clean action for the file.
	26310	Version is not added to the file in latest folder if we perform 'Save to My Files' after performing 'Save as' action
	26331	In Interactive Protect. post to groups not correctly rendered with large fonts
	26335	There was an error...' is displayed while performing 'Open in Word..' action on PDF document
	26403	User is navigated to Group instead of file preview when we click on 'Link to file' link on Share dialog
	26478	WCM options are not reflected to latest build after upgrade
	26509	Different behavior is displayed while clicking on Share from ribbon and Connect pane for unsaved document
863057	26537	Installation error when old version of Microsoft Visual C++ 2012 Redistributable package is installed
874122	26718	Outlook crashes when using 'Close original message window when replying...'
	26946	[Mixpanel] Update user-agent in http header with installed product and version
665797	27094	OpenText eDocs DM10 support
963995	27366	Request to sign all Workshare dlls
889856	26982	New Terminal Server Registry keys for Professional 9
876202	27326	An error occurred while executing the PDFclean clean action
912598	27328	Right-click menus integration missing from DeskSite and FileSite 9.0 update 6

CR #	FB #	Description
964856	27397	Add "Why do I have to sign in?" link to Sign in dialog
920183	27115	Turning off Connect panel not remembered
947115	27512	Please select Compare or Protect Module' when installing Workshare.Professional.msi
	27371	Enhance licensing
00967379	27507	Object reference not set to an instance of an object when clicking forward
00981861	27954	New attached files are not triggered in window reply
	28097	Workshare 9 msp build failure
	28380	Update the reminder/expired pages to allow the user to refresh the license without having to click on Purchase Now
00805582	24424	Email signature is not populated when using send document menu from DeskSite
	27629	Profile setting changes are not reflected in Workshare Configuration Manager after loading wso file
00976102	27712	Spal.dll error is displayed on launching Outlook
	28014	Workshare options are displayed twice in PowerPoint, when we run Workshare Configuration Assistant after running Citrix terminal registry keys
00980358	27921	Workshare Configuration Manager shows incorrect Connect subscription type
00125114	19852	Ability to utilise Outlook default font when emailing from Compare and Word
00866083	26854	Interactive Protect not triggered using Outlook 2013 in window reply
00874094	26700	Protect .policy files are not created during installation
00876091	26879	Password required dialog box is displayed when cleaning non-password protected pdf
00889807	26976	Metadata detection does not trigger Interactive protect panel
00926073	27246	Sync icon missing from WorkSite group in Outlook ribbon after installing Pro
00958128	28371	Best Authority plugin does not function correctly when Workshare add-in is enabled
00958370	27348	Duplicate interactive panel appears when Egress switch add in is enabled

CR #	FB #	Description
00969679	27678	Unchecking all metadata types in Interactive Protect panel cause skip cleaning the entire document
00969734	27679	Adjusting Quick Access Toolbar commands not remembered within Word
00969761	27704	HKCU settings are not applied when changing options in WCM (Admin Mode)
00971484	27804	Ability to enter proxy server details in the Configuration Manager
00975120	27869	Request for interactive protect panel to automatically expand and show the metadata removal choices
00981878	27934	User is unable to connect to SharePoint 2013 via HTTPS url through WCM.
00984388	28073	Retain attachments in Sent Item' option does not attach a copy of the attachment
00996219	28887	Ability to remove the added .pdf extension once using Convert to PDF and saving into FileSite
01000802	29045	Custom macros not being saved to normal.dotm
01006636	29445	Outlook hangs when Workshare Ribbon Add-In for Microsoft Office is enabled
01014630	30315	Unable to preserve changes to normal.dotm
01999887	29084	Workshare temp files/folders are not being removed automatically from %temp%
	28950	WCM hangs when clicking on 'Login' button after changing 'Use server' option
	29162	Typo in text beside to 'Workshare Professional' option on 'Send To Application' dialog.
	29113	Include latest released version of Connect for Desktop
	29727	Share to Groups email HTML redesign
01016425	30735	Password required dialog options are incorrectly displayed on Japanese version of Windows 7
01018668	31096	OK and Cancel buttons in Password required dialog are not visible when display is set to 125%
00778603	23887	Active setup registry keys are not created at first login
01001716	29121	"There was a problem with the installation - Fatal error during installation" when Connect is already installed

CR #	FB #	Description
01012247	29879	Workshare Protect metadata removal policy error: The system cannot find the file specified during installation
01013361	30088	Workshare repair window appears upon launching Workshare Configuration Manager for the first time
	30837	Upgrade.Bundle.exe does not update version number in Programs & Features
	24500	Metadata related options are not disabled when 'Remove metadata' checkbox is unchecked
01017144	30813	Sign in window pops up when inserting a 'Text from File' in Word
01018854	31213	Interactive Protect hangs during discovery contents for Excel files
00989357	30911	Please login to a server is displayed when using Offsite
01004885	30571	Error "Cannot edit Range" when cleaning documents with small text
00523915	21274	Search not responding after clicking load defaults to default in Workshare Configuration Manager
00166684	22454	Changes to speaker notes in moved slides not detected
00682812	22600	No progress bar displayed when clicking Send and Protect if 'Email security dialog while discovering risk' is set
00829479	25338	Grammatical error after applying patch from CR 00724148
00836047	25935	File names from the zip file are incorrectly displayed in Interactive Protect panel
	29996	Workshare didn't detect any changes' banner is displayed for all emails which containing documents with WS Tracking ID
01014638	30316	Error in Action. The following error occurred while executing the Clean action for the file <name>
01014724	30349	Unable to delete document reviewers
	31288	Password prompt is not displayed when sending protected document through Interactive Protect panel
	31337	BCC warning dialog is not displayed when sending document through Add Large Attachments from Interactive Protect panel
	31575	Error is displayed if user performs Secure File Transfer action for the second time and clicks 'Apply' while forwarding a mail

CR #	FB #	Description
	31602	All sections in Interactive Protect panel are not displayed when document is attached after performing Secure File Transfer action in rich text format
	31612	File shared information is not updated in the mail body after performing Secure File Transfer action in rich text format
	31425	Cleaning metadata process is cancelled for all files when cleaning for password protected file is cancelled
	31753	Skip button not displayed on the password dialog
	31754	Skip button on Excel sheet password request dialog not working
	31327	State of "Get return receipt" option is changed if user unchecks "Recipients can invite others to this folder" option.
00471003	20441	Get return receipt does not work if users are not logged in
	31933	Secure File Transfer and inline view related information is not updated in Help file
	31741	New Connect user password policy
	30835	License expired/unvalidated/missing error messages
01015369	30483	Ability to set 'Remove metadata' option unchecked by default in Interactive Protect panel
	30806	Enable Send Files Securely as the default
	30808	HTML update for Send Files Securely
	30809	Automatically enable Secure File Transfer checkbox when total attachments over X MB
01017395	30866	Request to be compatible with DeskSite/FileSite 9.2
	30926	Extend the Phone Home functionality to transparently update features
	30968	Update Help files and Quick Start Guides
	31737	Rename option display text
	31740	Update date: Copyright ©1998-2015 Workshare
01021897	31800	Request to show NetDocuments server location for Australia
01026793	33140	PDF conversion and print queue pauses when converting Word document to PDF
	32894	Office 2016 Support
	33137	Convert to PDF button causes Microsoft Word to freeze up upon opening another document

CR #	FB #	Description
	33986	License Notification Nags are not displayed when user has below 30 days of license
	31409	Unable to create PDF/A documents using 'Combine Files in Workshare' option.
00993603	28648	Sharepoint integration error: The document needs to be saved
01014754	30350	Unable to convert PPTX with gradient fill shapes to PDF
01018726	31140	E-mail messages are stuck in the Outbox in Outlook
00996226	31298	Missing Workshare icons on Filesite ribbon in Outlook
01020714	31572	Spell checking skipped when using 'Send and Protect'
	31793	Interactive Protect panel is not updated in expected way when valid password was entered to 'Password required' dialog
01022466	32045	Converting a Word document to PDF via the Word ribbon causes the next document to be opened to not function
01022446	32097	The following error occurred while processing the email: Member not found. (Exception from HRESULT: 0x80020003)
01024367	32616	Content risk remove fails in Excel when macros is checked
	33036	An error occurred..' dialog is displayed when uploading the documents into Workshare App from SharePoint
	33186	Convert to Link option is enabled by default, if user removes .wsl document and then attaches normal document.
01027538	33252	Document reviewers are not being removed from DOCX files using Interactive Protect
	33394	Unable to save documents containing # character to NetDocuments
01028359	33442	Cannot save the attachment. The operation failed. An object cannot be found
	33982	Only one attachment is detected for processing if unlicensed - other attachments are not listed in Interactive Protect pane
	34000	Error dialog is displayed when user tries to share files to themselves.
	32571	Document needs to be saved' message is displayed when user tries to perform 'Combine files' option to document from SharePoint
01019161	31299	Remove temporary file attribute when creating PDFs

CR #	FB #	Description
01023002	32176	Treat .asd files like regular unsupported files instead of alerting to metadata
01029834	33780	Workshare.PdfCreator.exe, Workshare.Pdf.Combine.exe and WINWORD.exe processes do not terminate
01036003	35254	Professional 9 Update 5 - Request for compatibility with iManage 9.3
01029324	33783	Professional 8 PR1 - Workshare does not honor Filesite Open/Save dialog configurations
01030077	33886	Pro 9 MR4 - Incorrect spelling for the word 'seperated' in Convert to PDF dialog box
01030289	34001	Pro9 U3 - Emails are not tagged on first attempt using ePredict for WorkSite when Interactive Protect is enabled
01033821	34723	Password required dialog for protected Excel documents displayed out of screen
01033966	34727	Cleaning options under PDF security in Convert to PDF panel do not match with Content Risk settings in WCM
01034311	34881	Word document zoom level resized when converting to PDF within Word
01034821	35034	New changes of attached document are being removed by Interactive Protect
01039357	35974	Content discovery failed when emailing redline with track changes
01041955	36486	Contents are removed from text Content Control boxes when locking options set
1030354	34002	Document with +62 characters in file name is truncated on Workshare Protect progress bar
1038512	35838	Unable to skip cleaning speaker notes in PowerPoint when using cleaning options from the Convert to PDF panel
1046952	37224	Email signature not populated when attaching comparison to email using Compare
1057021	39457	Excel hangs when using Workshare Content Risk
1054960	39073	Cleaning particular combination of Word, Excel or PPT files results in unexpected cleaning for document properties in Word files
1043080	36649	Error: "Unexpected error. Value cannot be null. Parameter name: value" when using Interactive Protect

CR #	FB #	Description
1058414	39794	'Some files are in unsupported formats' message appears in Interactive Protect panel when emailing comparison documents
1039572	36835	Ability to integrate with 'Click-to-Run' Office 2016
1048921	37703	Ability to send a PDF of changed pages only
1032094	34293	iManage servers instances are removed when disabling the option 'Allow users to override'
1044539	36834	Attachment duplicated when using 'Recent Items' to attach a document
671392	37018	Attachments change order after cleaning using Interactive Protect

## Known Issues

The following are known issues in the Workshare Protect 9 release - for more information, please contact Customer Support.

ID	Details
<b>01018743</b>	Font changes to Times New Roman in email body when sending documents to groups from Interactive Protect.
<b>41891</b>	Toggling PDF and PDF/A options in the Convert to PDF dialog causes PDF security configuration and password protection options to be disabled (64-bit version only).
<b>40597</b>	Local File Store dialog is displayed when browsing for files in the desktop app when DMS is set as default (64-bit version only).
<b>40574</b>	User is not automatically logged into Protect after logging into the desktop app first (64-bit version only).
<b>40430</b>	'Color is not resolved yet' error is displayed when at least one document contains Opulent design background.
<b>39743</b>	Unable to transfer content from Excel to Word using drag and drop.
<b>39625</b>	Custom fonts and macros not being saved to normal.dotm when Workshare add-in is enabled.
<b>38528</b>	After converting Office documents with dots in the file name to PDF, parts of the file name are missing.
<b>37429</b>	Digitally signed emails showing as encrypted not digitally signed after cleaning.

ID	Details
37311	Excel spreadsheet hangs when sharing as an attachment through Outlook.
35636	Cleaning certain PDF attachments results in the PDF file changing to 2KB file size.
35474	Activated users are still prompted to sign in to license Professional when using the feature "Save to My Files" in Word.
26667	The right-click Combine pdf with Workshare option is not displaying for Office documents after upgrade. Issue observed in Windows 7 SP1 Office 2010 SP2.
26585	License expiry dialog is displayed when logged in as SSO user through share action. Issue observed in Windows 8.1 Enterprise x64-G Office 2013 SP1 DeskSite 9 Update 5.
26584	Account name is not displayed in the WCM > My Products after re-launching WCM. Issue observed in Windows 7 SP1 Office 2010 SP2.
26490	Cleaning Options button does not respond in Workshare Protect dialog while converting to PDF password protected XLS/XLSX. Issue observed in Windows 7 SP1 Office 2010 SP2.
26377	The Save... prompt is not displayed when closing the document after performing clean action through Content risk. Issue observed in Windows 7 SP1 Office 2010 SP2.
26353	Workshare options are not displayed correctly if display font size changed to 125% or 150%. Issue observed in Windows 7 SP1 Office 2010 SP2.
26309	Exception is displayed in the system tray when performing secure file transfer action on document containing '['( or ')]' in the name. Issue observed in Windows 7 SP1 Office 2010 SP2.
26107	Document is not auto saved to DM server after performing Share action. Issue observed in Windows 7SP1(x64) Office 2013 SP1 (x86) eDocs DM 5.3.1 Patch 5 (COM Only).
26024	The Workshare Connect icon is not shown in the Control Panel after upgrading in MSI mode. Issue observed in SharePoint 2013 SP1 Windows 8(x64) Office 2013.
25915	Links in Excel files are not cleaned when user deselects Exclude field codes with hyperlinks in the WCM. Issue observed in OpenText DM 5.3.1 COM Suite Patch 5 - Windows 8.1(x64) Office 2013 Outlook.
25913	ADM files do not contain license information when generated in the WCM Admin Mode. Assuming that the license entry is generated, but empty then this is as expected. ADM files can't contain entries that are larger than 256 characters so we don't try.

ID	Details
25617	Error saving.. is displayed when sharing files to a group containing special characters in its name. Issue observed in Windows 7 SP1(x64) Office 2010 SP2 FileSite 9 Update 5 + EMM.
24926	Workshare warning dialog is not displayed when user clicks See changes link from PowerPoint in Protect standalone build. Issue observed in Windows 7 SP1 Office 2007 SP3.
23947	WCM options of removed features are still displayed in ADM file. Issue observed in AD Server: Windows Server 2008 Enterprise (X86) SP1 Client : Windows 7 SP1(x64) Office 2010 SP2.
22054	'No valid launch method is found' error is displayed when launching a .WPF file from DM server. Issue observed in OpenText DM 5.3.1 patch5 Windows 8.1 Office 2013.

## Contact Info

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

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

EMEA: +44 207 539 1400

US: +1 415 590 7705

For sales enquiries, contact the Workshare Sales team:

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

EMEA: +44 207 426 0000

US: +1 415 590 7700

APAC: +61 2 8220 8090

 Workshare Ltd.  
© 2017. Workshare Ltd. All rights reserved.

Workshare Professional and Workshare DeltaView are registered trademarks of Workshare Ltd. Workshare Compare, Workshare Protect, Workshare 3, Workshare DeltaServer, SafetyGain, and the Workshare logo are trademarks of Workshare Ltd. All other trademarks are those of their respective holders.

Trademarked names may appear throughout this guide. Instead of listing these here or inserting numerous trademark symbols, Workshare wishes to state categorically that no infringement of intellectual or other copyright is intended and that trademarks are used only for editorial purposes.

The authors/publishers of this guide and any associated help material have used their best efforts to ensure accuracy and effectiveness. Due to the continuing nature of software development, it may be necessary to distribute updated help from time to time. The authors would like to assure users of their continued best efforts in supplying the most effective help material possible.

The authors/publishers, however, make no warranty of any kind, expressed or implied, with regard to Workshare programs or help material associated with them, including this guide. The authors/publishers shall not be liable in the event of incidental or consequential damages in connection with, or arising out of, the programs or associated help instructions.

Workshare Ltd., 20 Fashion Street, London E1 6PX [www.workshare.com](http://www.workshare.com)