

Workshare Professional 10 & NetDocuments

User Guide

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Introducing the Workshare Professional Integration with NetDocuments

Workshare Professional reimagines multi-party review and collaboration and ensures the safe and accurate exchange of information, enabling the collaborative evolution of high value business documents.

Workshare Professional is a desktop application that automates managing changes to business documents, protects against unauthorized content disclosure and delivers the world's most secure PDF creation, all in one integrated solution.

The integration with NetDocuments provides key comparison functionality for your NetDocuments files as well as conversion to PDF. In particular:

- Comparison of Word, PowerPoint, Excel and PDF files, including image-based PDF files
- Comparison of selected pieces of content, such as a single paragraph or clause
- Ability to accept/reject changes in a comparison and then create new documents
- Advanced comparison features including one-to-many comparisons (Word and PDF files), version comparisons, and access from within Office and NetDocuments

The functionality is available within NetDocuments as follows:

- From within NetDocuments, use **Send to application** to compare your chosen files in Workshare Compare
- When comparing, browse to NetDocuments from within the Workshare Compare document selection dialog
- After running a comparison, save the redline to NetDocuments
- From within NetDocuments, use **Send to application** to convert your chosen files to PDF using Workshare
- When converting to PDF, save the PDF to NetDocuments

This document describes how to perform this functionality. For a complete description of all Workshare functionality, refer to the *Workshare Professional User Guide*.

Setting Up the NetDocuments Integration

In order to integrate NetDocuments into Workshare Professional, you must select NetDocuments during the installation and perform some simple configuration in NetDocuments.

Note: *ndOffice must be installed to use the Workshare NetDocuments integration.*

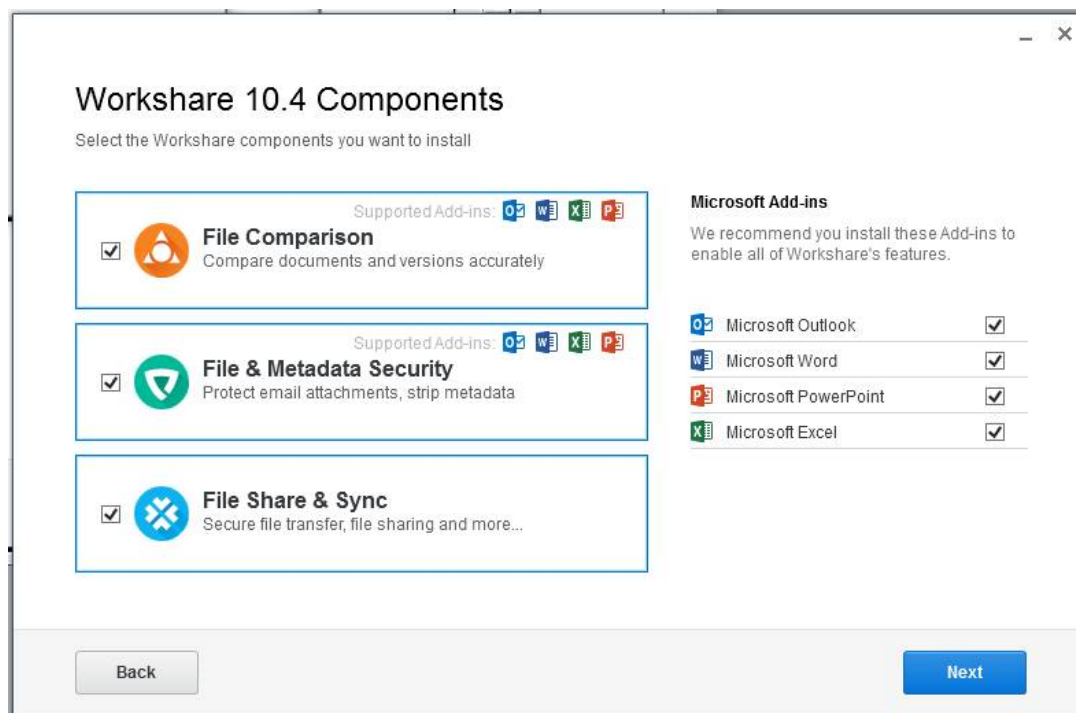
Installing the NetDocuments integration

During a Workshare Professional installation, on a single machine or a network deployment, you select which DMS integration you want to include.

On a single machine.....

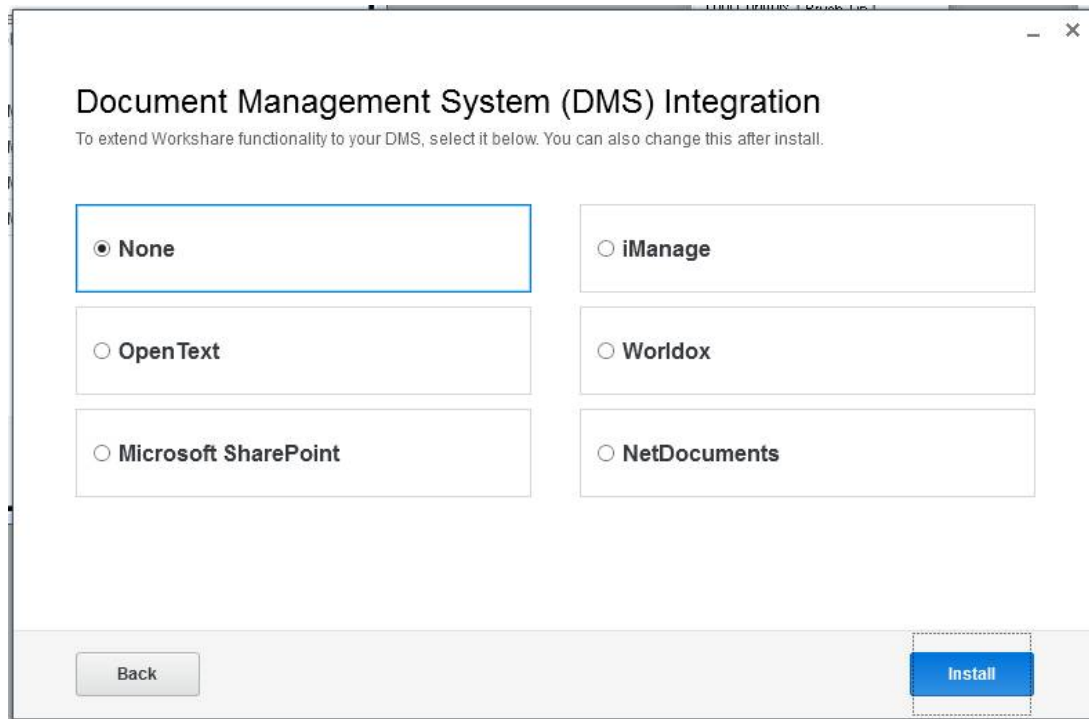
To install Workshare Professional with NetDocuments integration:

1. Double-click the executable file.
2. Click **or customize your install**.



3. Select the Workshare components and the Microsoft add-ins that you want.

4. Click **Next**.



5. Select **NetDocuments**.

6. Click **Install**. The installation process may take a few minutes. A progress bar indicates the progress of the installation. After this process is completed, click **Finish**.

In a network deployment.....

You can use the executable file or the MSI files found within the executable file to install Workshare from the command line.

An example command line install to install Workshare Professional with NetDocuments integration is:

```
msiexec.exe /i <path to shared directory>\Workshare.Professional.msi  
REINSTALL=ALL REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1  
INSTALL_NETDOCUMENTS=ON /qn
```

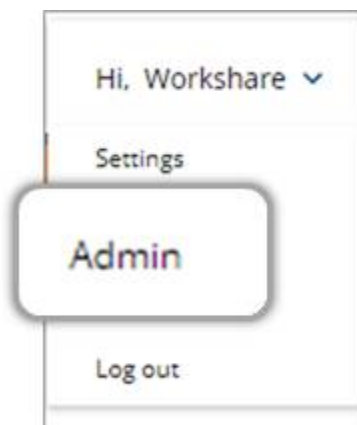
For further information about installation, refer to the *Workshare Professional Installation Guide*.

Configuring NetDocuments

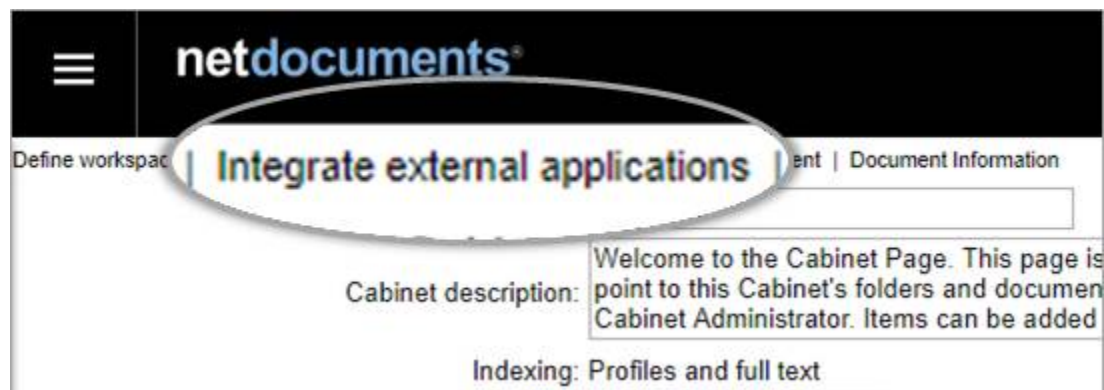
In order to maximize the integration of Workshare Professional in NetDocuments, you should add Workshare as an application to your NetDocuments cabinets. Workshare comparison and convert to PDF functionality will then be available when using NetDocuments **Send to application** functionality.

To add Workshare as an application:

1. Click your user name and select **Admin** in the top right of the NetDocuments window.



2. From the **Cabinets** list, click the cabinet you want to add Workshare to.
3. Click **Integrate external applications** at the top of the page.



- A list of available published applications is displayed and you can select the app you want to be available in the *Send to Application* dialog.

netdocuments® DOCUMENTS On Demand™

External Applications
Acme Ltd

Web Applications

External web applications that have been integrated with NetDocuments are listed here. Those selected below will appear in the Send to Application dialog, so users can easily send documents from NetDocuments to these applications.

Add unpublished app

Application Name	Application Description	Application Vendor
<input checked="" type="checkbox"/> Workshare PDF	Convert to pdf with Workshare	Workshare
<input type="checkbox"/> Test application	Test application	Corp.
<input checked="" type="checkbox"/> Workshare Compare	Fast and accurate comparison of two documents.	Workshare

Local Applications

Identify the items to display on the Send to Application dialog if found on the local computer:

☐ Workshare (Compare)

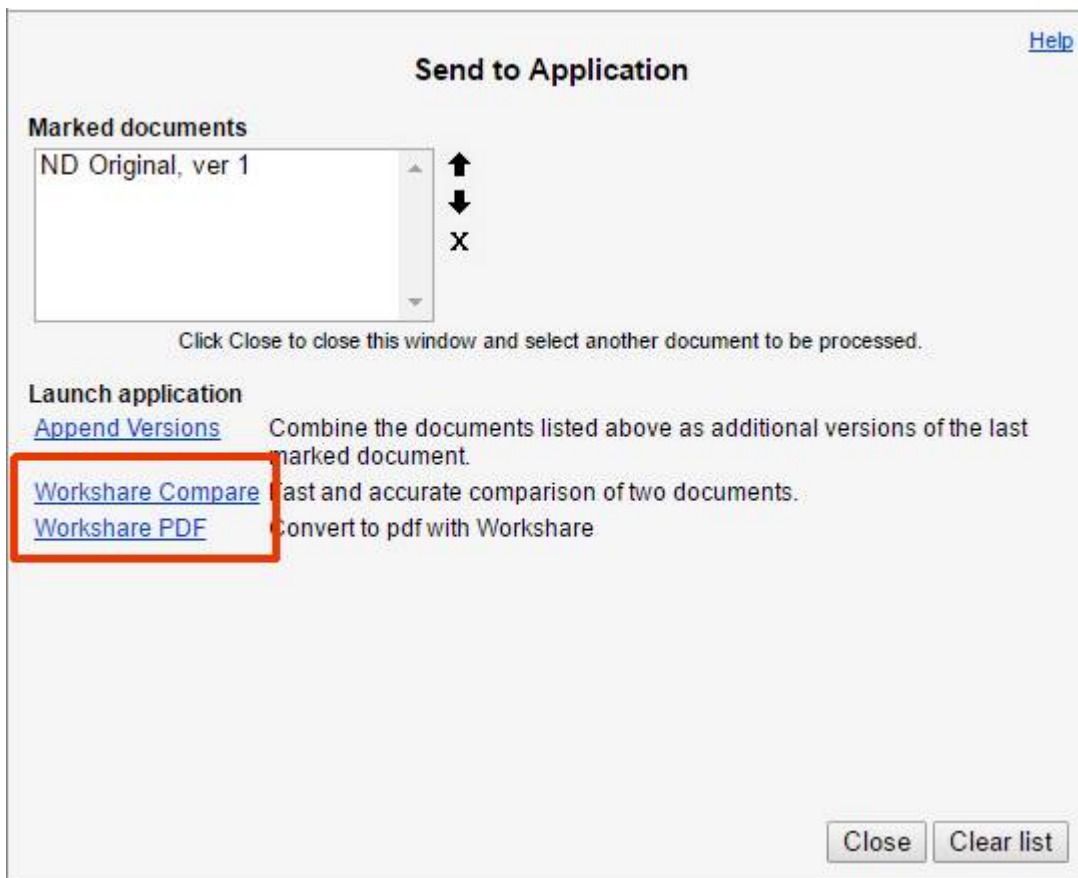
Cancel or Save

- Make sure **Workshare Compare**, **Workshare Compare for Excel** and **Workshare PDF** are selected in the **Web Applications** section and that **Workshare (Compare)** is deselected in the **Local Applications** section.

Note: Deselecting **Workshare (Compare)** in the **Local Applications** section ensures there is not an additional unnecessary "Workshare" entry in the *Send to Application* dialog.

- Scroll down and click **Save**.
- Scroll to the bottom of the cabinet page and click **Submit**.

Now when a user selects the **Send to application** option in NetDocuments, **Workshare Compare** and **Workshare PDF** are listed as available applications.

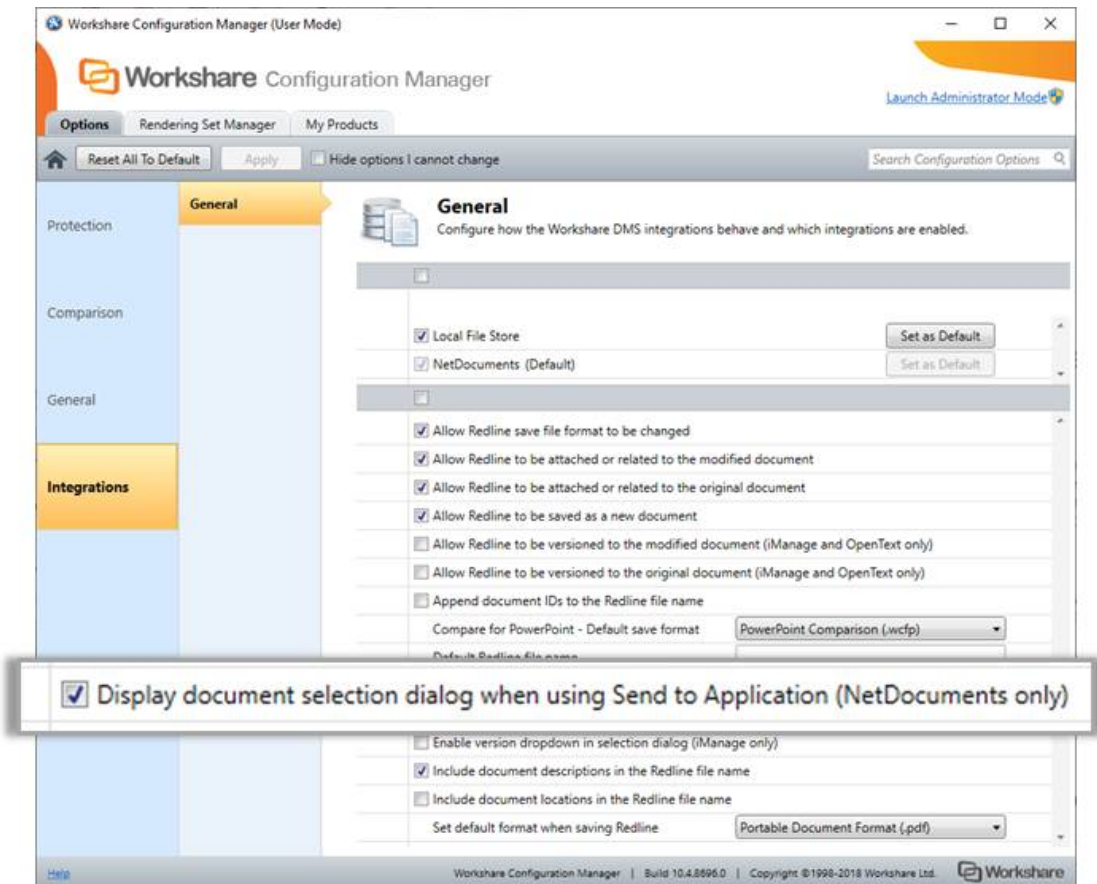


Configuring Workshare

There is no major configuration required in Workshare Professional to enable the NetDocuments integration. There is a single parameter that can be set to determine if the document selection dialog is displayed when comparing.

To configure NetDocuments in Workshare Professional:

1. Access the Workshare Configuration Manager, for example, from the Start menu, select **Programs > Workshare > Workshare Configuration (User Mode)**.
2. Select **Integrations > General**.



3. By default, the **Display document selection dialog when using Send to Application** parameter is selected so the document selection dialog is displayed when using Send to Application. This enables you to switch original and modified documents, add further documents to compare, change the rendering set and so on. In particular, you can change the comparison mode to Fast. If you don't want the Workshare Compare document selection dialog to display, but simply want the comparison to run, deselect this parameter.
4. Click **Apply** to apply any changes.

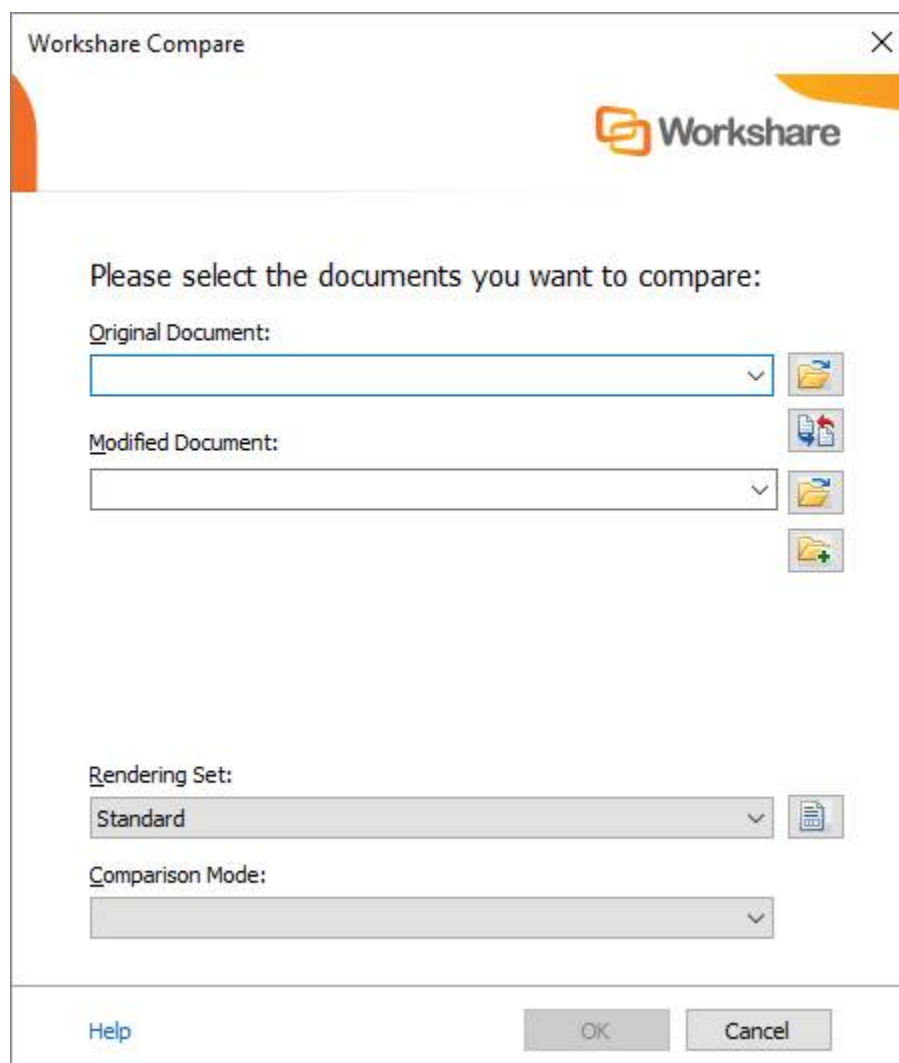
Browsing to NetDocuments from Compare


Comparing Word and PDF files

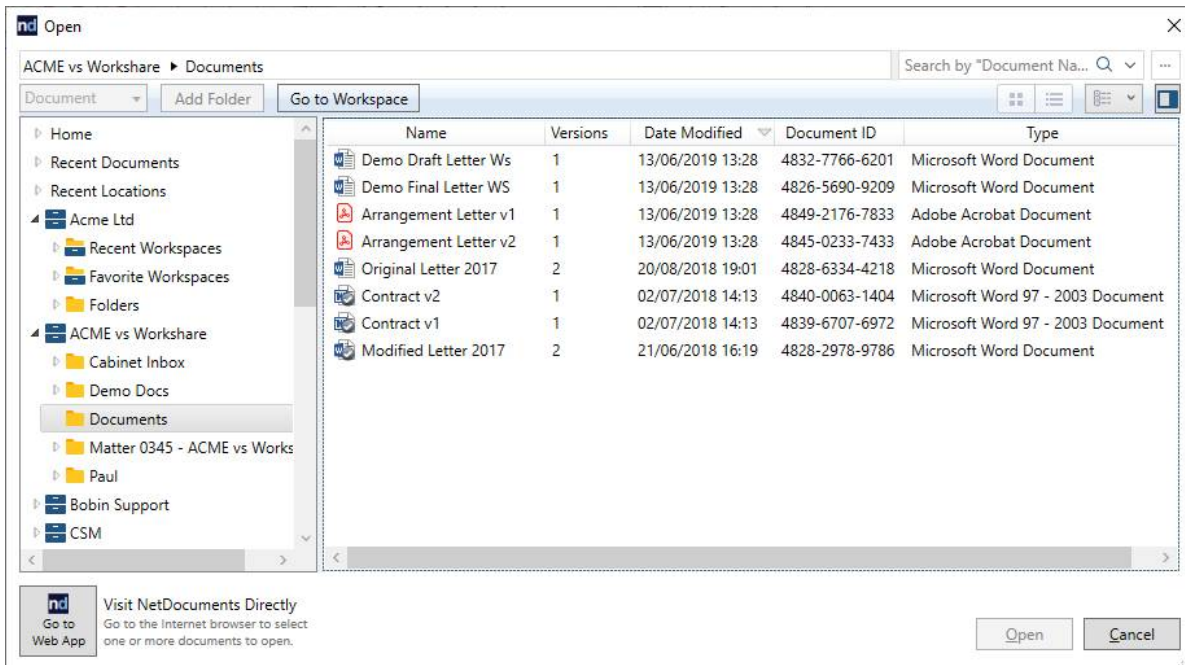
In this scenario, you launch Workshare Compare as a standalone application from your desktop or the Start menu. You then select the documents you want to compare from NetDocuments. Launching Workshare Compare in this way enables you to perform one-to-many comparisons - comparing a single original document against multiple modified documents.


To compare Word and PDF files:


1. Double-click the Workshare Compare shortcut on your desktop or from the Start menu, select **Programs > Workshare > Workshare Compare**. The following dialog is displayed:





2. Click  to the right of the **Original Document** field. If you are not logged into NetDocuments, log in using the *Login* dialog displayed.
3. Navigate to the document location in NetDocuments and select your original document that you want to compare against a modified document.

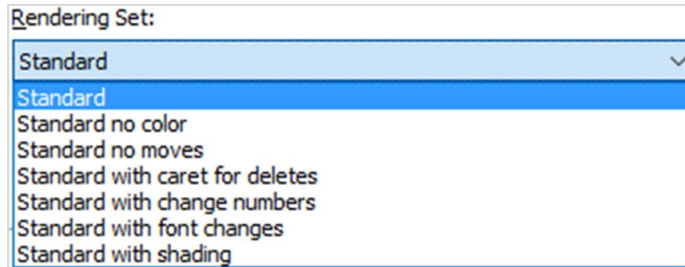


4. Click **Open**. The selected document is displayed in the **Original Document** field.
5. Click  to the right of the **Modified Document** field.
6. Navigate to the document location in NetDocuments and select your modified document that you want to compare against the original document.
7. Click **Open**. The selected document is displayed in the **Modified Document** field.

***Tip!** To swap the original and modified documents, click . This button is only available if you are comparing two documents rather than comparing multiple documents against an original document.*

8. If you want to compare the original document against another document, click . An additional **Modified Document** field is added.
9. Click  to the right of the second **Modified Document** field.
10. Navigate to the document location in NetDocuments and select a further modified document that you want to compare against the original document.
11. Click **Open**.

12. Repeat step 9-11 to add further documents as required.
13. From the **Rendering Set** dropdown list, select the rendering set you want to use. Rendering sets contain parameters that define how changes are displayed in the redline (comparison) document. You can select from the standard rendering sets provided with Workshare Compare or you can create and customize your own rendering sets.



Note: Clicking  to the right of the **Rendering Set** field displays the **Rendering Sets Manager** where you can create, modify and delete rendering sets.

14. From the **Comparison Mode** dropdown list, select the type of comparison you want to perform from the following:
- **Standard:** Workshare Compare performs a regular comparison.
 - **Fast:** When comparing a DOC or DOCX file against another DOC or DOCX file, Workshare Compare performs a binary comparison which is faster than a standard comparison.

Note: The **Fast** option is only available if the **Enable fast comparison** parameter (**Comparison > Administration** category) in the **Workshare Configuration Manager** is selected.

- **Text Only:** Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.
 - **Compare without OCR:** Workshare Compare compares PDF files without first performing OCR. With image-based PDF files, Workshare Compare will first apply OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text in order to compare. If you do NOT want Workshare Compare to perform OCR, select this option.
15. Click **OK**. The comparison process is launched and an *In Progress* dialog is displayed.

Tip: Progress is also indicated by the shading in the Task Bar icon for Workshare



When the comparison is complete, the redline is displayed in the Workshare Compare window. If the original document has been compared against multiple documents, each redline is displayed in a different tab. For a full description of the Workshare Compare interface, refer to the *Workshare Professional User Guide*.

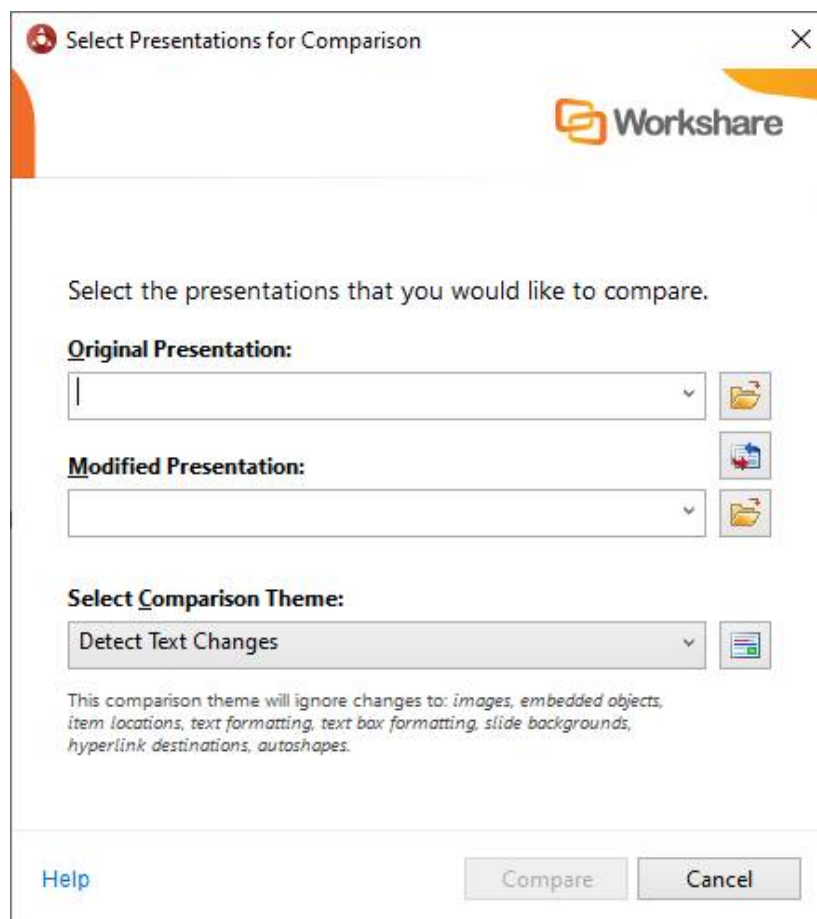
Note: When comparing a PDF file, the display may vary according to the type of PDF - the software used to create the PDF file. For example, Adobe, Amyuni, CutePDF, novaPDF, and so on.


Comparing PowerPoint presentations

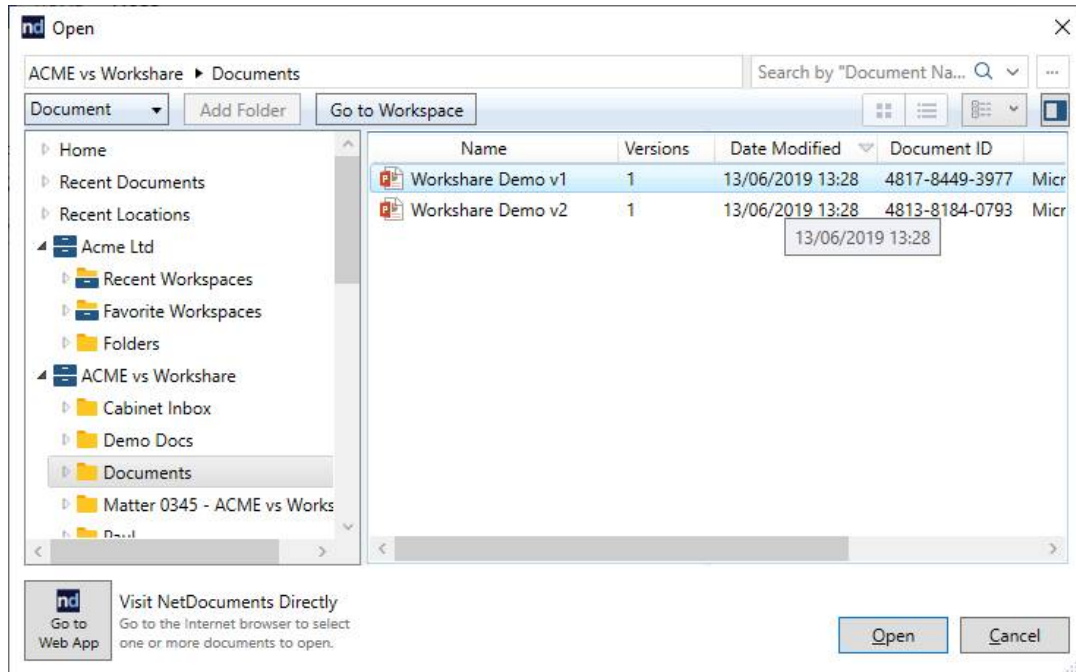
In this scenario, you launch Workshare Compare for PowerPoint as a standalone application from your desktop or the Start menu. You then select the presentations you want to compare from NetDocuments.


To compare PowerPoint presentations:

1. Double-click the Workshare Compare shortcut on your desktop or from the Start menu, select **Programs > Workshare > Workshare Compare for PowerPoint**. The following dialog is displayed:




2. Click  to the right of the **Original Presentation** field. If you are not logged into NetDocuments, log in using the *Login* dialog displayed.
3. Navigate to the file location in NetDocuments and select your original presentation that you want to compare against a modified presentation.



4. Click **Open**. The selected file is displayed in the **Original Presentation** field.
5. Click  to the right of the **Modified Presentation** field.
6. Navigate to the file location in NetDocuments and select your modified presentation that you want to compare against the original presentation.
7. Click **Open**. The selected file is displayed in the **Modified Presentation** field.

Tip! To swap the original and modified presentations, click .

8. From the **Select Comparison Theme** dropdown list, select the comparison theme you want to use. Comparison themes contain a set of parameters that define exactly what is compared as well as how changes are displayed. You can select from the standard comparison themes provided with Workshare Compare for PowerPoint or you can create and customize your own comparison themes.

Note: Clicking  to the right of the **Select Comparison Theme** field displays the Comparison Themes Manager where you can create, modify and delete comparison themes.

- Click **Compare**. The comparison process is launched and a progress dialog is displayed.

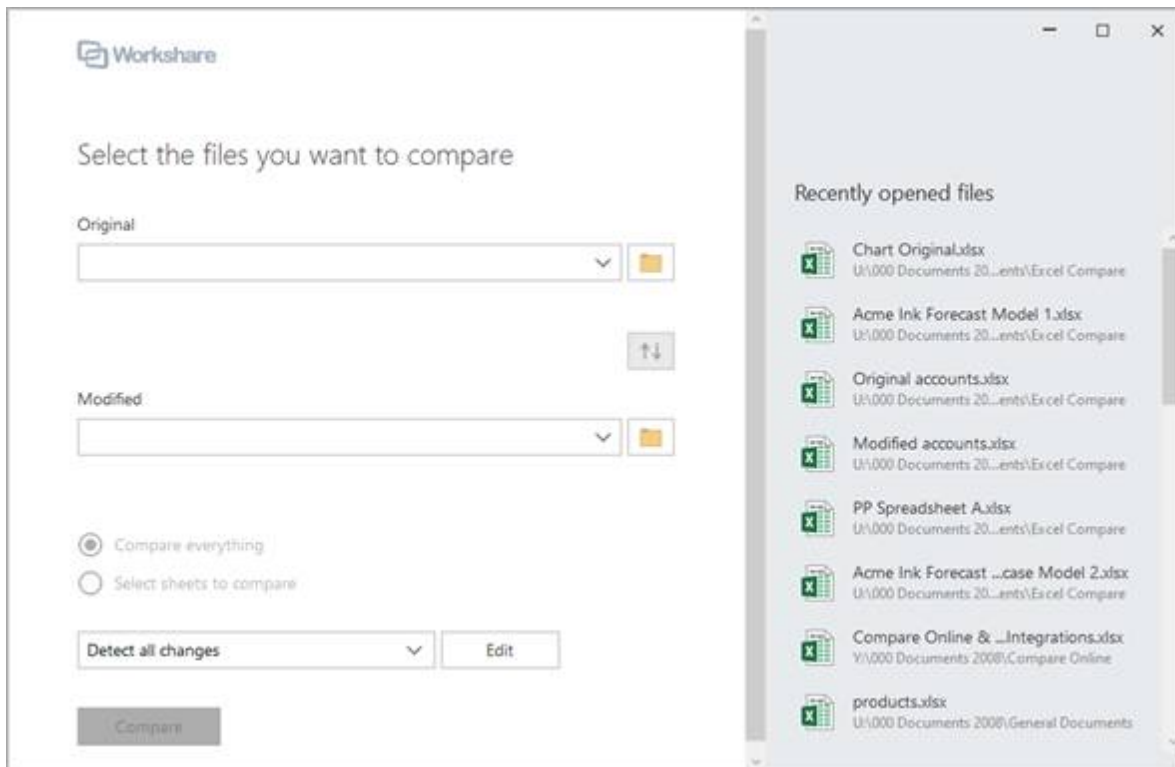
When the comparison is complete, the Workshare Compare for PowerPoint window is displayed showing the changes between the selected presentations. For a full description of the Workshare Compare for PowerPoint interface, refer to the *Workshare Professional User Guide*.

Comparing Excel spreadsheets

In this scenario, you launch Workshare Compare for Excel as a standalone application from your desktop or the Start menu. You then select the spreadsheets you want to compare from NetDocuments.

To compare Excel spreadsheets:

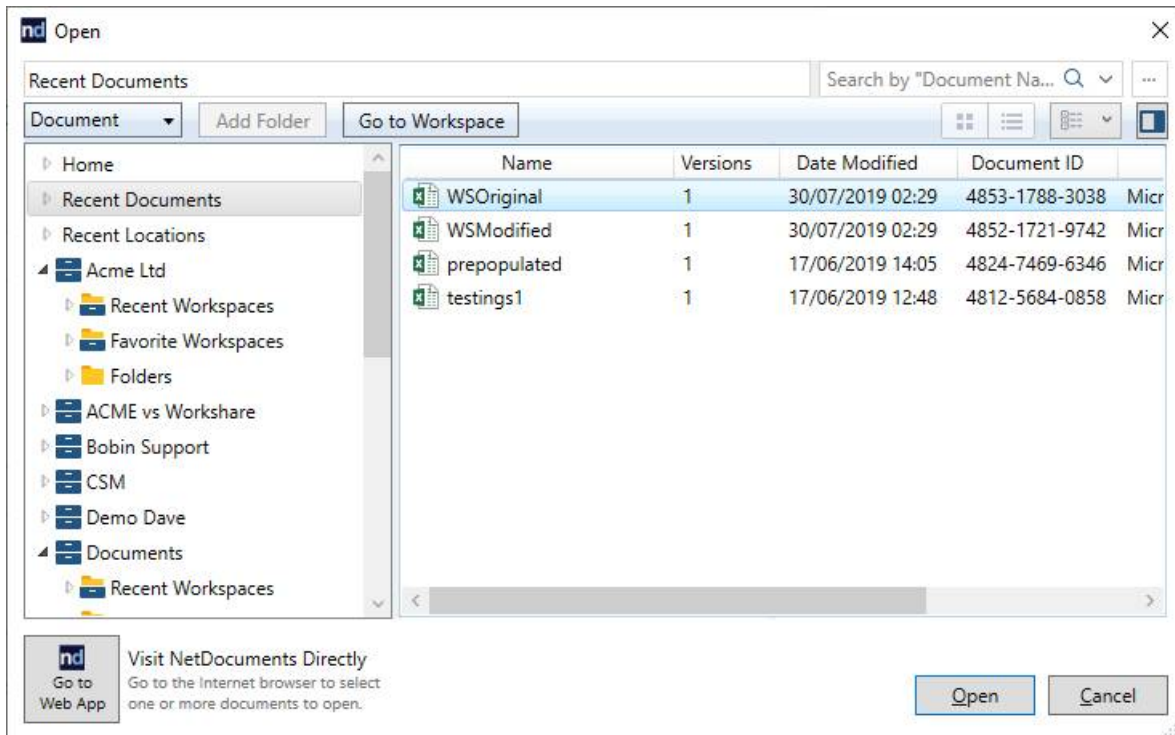
- Double-click the Workshare Compare for Excel shortcut on your desktop or select **Workshare Compare for Excel** from the Start menu. The following dialog is displayed:




- Click  to the right of the **Original** field. If you are not logged into NetDocuments, log in using the *Login* dialog displayed.

Tip! If you want to compare a recently used file, drag the file from **Recently opened files**.

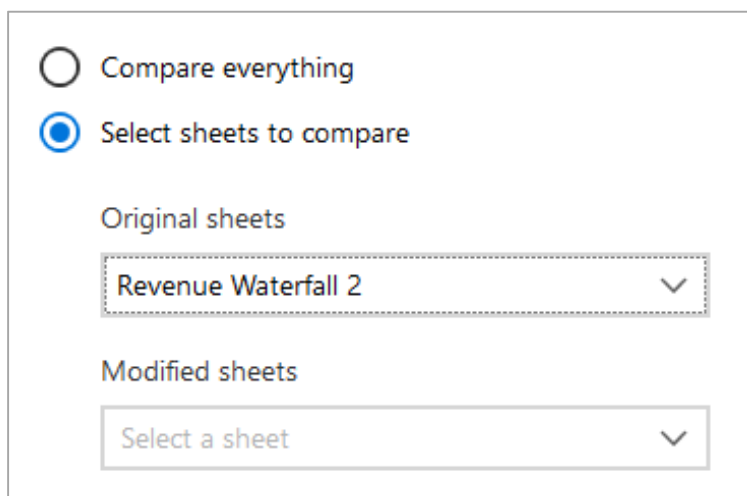
3. Navigate to the file location in NetDocuments and select your original spreadsheet that you want to compare against a modified spreadsheet.



4. Click **Open**. The selected spreadsheet is displayed in the **Original** field.
5. Click  to the right of the **Modified** field.
6. Navigate to the file location in NetDocuments and select your modified spreadsheet that you want to compare against the original spreadsheet.
7. Click **Open**. The selected spreadsheet is displayed in the **Modified** field.

Tip! To swap the original and modified spreadsheets, click .

8. If you want to compare individual sheets, select the **Select sheets to compare** radio button.



☐ Compare everything
☒ Select sheets to compare

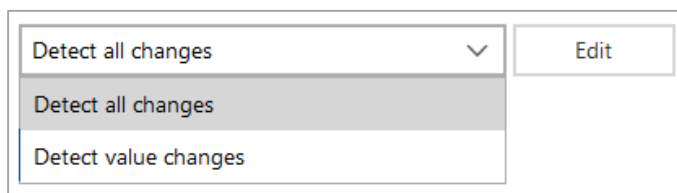
Original sheets

Revenue Waterfall 2

Modified sheets

Select a sheet

9. Select the sheet in your original spreadsheet and the sheet in your modified spreadsheet that you want to compare.
10. To select what changes are detected and how they are displayed, select the rendering set to use. Rendering sets contain a set of parameters that define what is compared and how changes are displayed in the comparison. You can select from the standard rendering sets provided with Workshare Compare for Excel or you can create and customize your own rendering.



Detect all changes
 Detect all changes
 Detect value changes

Edit

Note: Clicking **Edit** displays the *Rendering Set Manager* where you can create, modify and delete rendering sets. For a full description refer to the *Workshare Professional User Guide*.

11. Click **Compare**. The comparison process is launched.

When the comparison is complete, the Workshare Compare for Excel window is displayed showing the changes between the selected spreadsheets. For a full description of the Workshare Compare for Excel interface, refer to the *Workshare Professional User Guide*.

Saving Redlines to NetDocuments

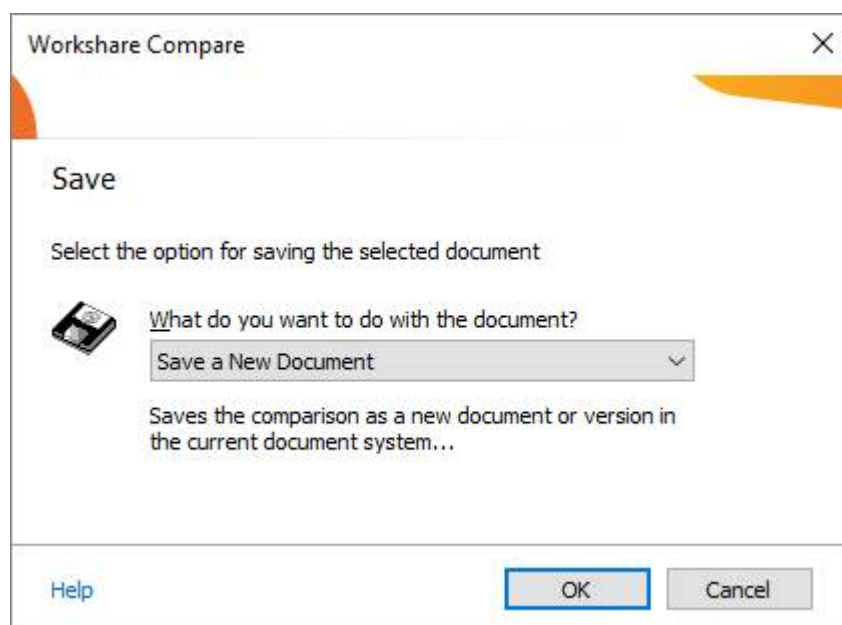
In all the Workshare comparison applications, you can save the comparison to NetDocuments.

Workshare Compare

In Workshare Compare, you save the redline as a Workshare DeltaFile (WDF), which contains all three documents (original, modified and redline). You can also save just the redline as a DOC/DOCX, RTF, HTM, TXT or PDF file or you can save the redline as a track change document.

To save the redline:

1. After running your comparison, click **Save As** and then **Comparison document** in the **Home** tab (or Quick Access Toolbar or File menu). The following dialog is displayed:



2. Select whether you want to save the comparison as a new document or attach it to the original or modified documents.
3. Click **OK**. The NetDocuments Save As dialog is displayed.

Note: If you click **Cancel** in this dialog, a message is displayed asking if you would like to save the redline locally.

4. Browse to the location where you want to save the comparison and modify the name of the comparison as required.

- From the **Save as type** dropdown list, select the format for the saved file from the following:

Workshare DeltaFile (*.wdf)	Saves both the redline and the source documents as a Workshare DeltaFile. This file can only be opened in Workshare Compare.
Word Document (*.doc/*.docx)	Saves the redline as a Microsoft Word file. The source documents are not saved.
Text Only (*.txt)	Saves the redline as a text file. The source documents are not saved.
Rich Text Format (*.rtf)	Saves the redline as an RTF file. The source documents are not saved.
HTML Document (*.htm)	Saves the redline as a HTML document. The source documents are not saved.
Adobe Acrobat File (*.pdf)	Saves the redline as a PDF file. The source documents are not saved.
Adobe Acrobat PDF/A File (*.pdf)	Saves the redline as a PDF/A file. The source documents are not saved.

- Click **Save**.

Saving redline as track change document

You can also save the redline as a Microsoft Word file that shows the changes as track changes.

Note: The converting to track changes functionality is only enabled, if the **Enable 'Convert to Track Change document'** parameter (**Comparison > User Interface** category) in the *Workshare Configuration Manager* is selected.

To save redlines with changes as track changes:

- Click **Save As** and then **Word document with Track Changes** in the **Home** tab (or Quick Access Toolbar or File menu).
- Select whether you want to save the comparison as a new document or attach it to the original or modified documents.
- Click **OK**. The NetDocuments *Save As* dialog is displayed.
- Browse to the location where you want to save the track change document and modify the name of the document as required.
- Click **Save**. The redline is saved as a Microsoft Word document with the changes indicated by track changes.

When you open the saved file in Microsoft Word, the changes are displayed as track changes.

Workshare Compare for PowerPoint

In Workshare Compare for PowerPoint, you can save the comparison as a PDF file or a WCFP (Workshare Compare for PowerPoint) file in NetDocuments, locally or on your network.

The PDF file can include the original and modified slides and/or a list of the changes per slide pair. It can also just include the slides that have changes.

***Note:** The layout and contents of the saved PDF are determined by the **Compare for PowerPoint – Default report layout** and **Compare for PowerPoint – Include unchanged slides** parameters (**Comparison > Administration** category) in the **Workshare Configuration Manager**.*

The WCPF file can be opened in Workshare Compare for PowerPoint.

To save a comparison:

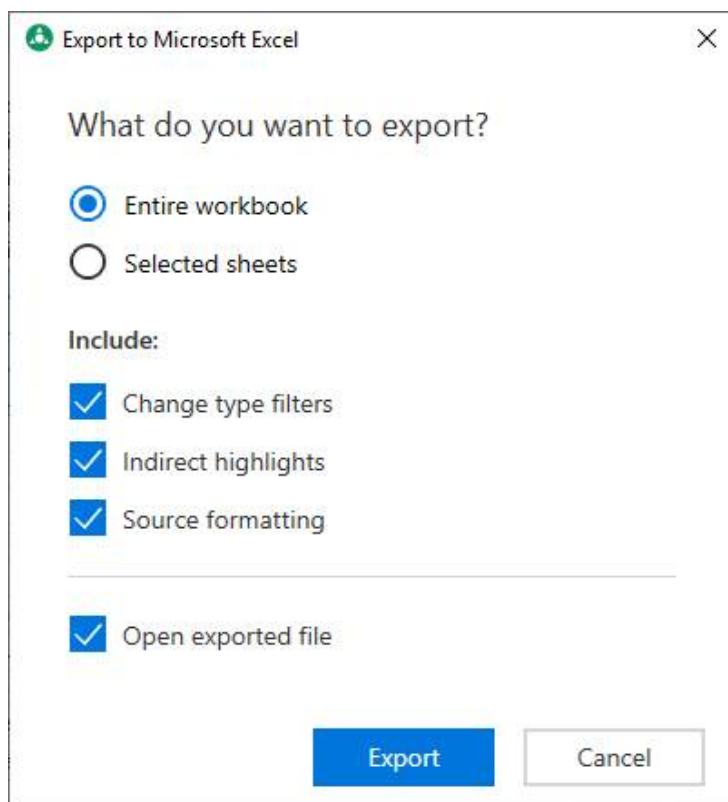
1. Click **Save** in the Home tab, the menu or quick access toolbar. The **Save As** dialog is displayed.
2. Select whether to save the comparison as a WCFP or PDF file.
3. Navigate to the location where you want to save the file and enter a name for the file.
4. Click **Save**.

Workshare Compare for Excel

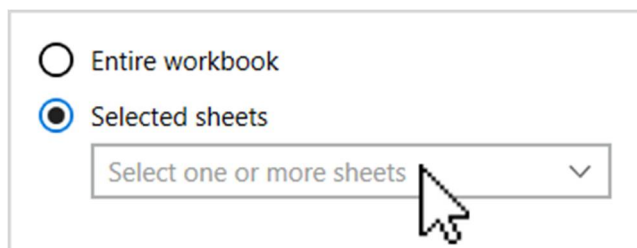
In Workshare Compare for Excel, you can export the comparison with all the changes to a new Excel file that you save to NetDocuments, locally or on your network.

To export the comparison:

1. Click **Export** in the Home ribbon. The Export to Microsoft Excel dialog opens.



2. Select whether you want to export the **Entire workbook** or only some **Selected sheets**.
3. If you choose **Selected sheets**, click inside the **Select one or more sheets** field and choose the sheets to export.

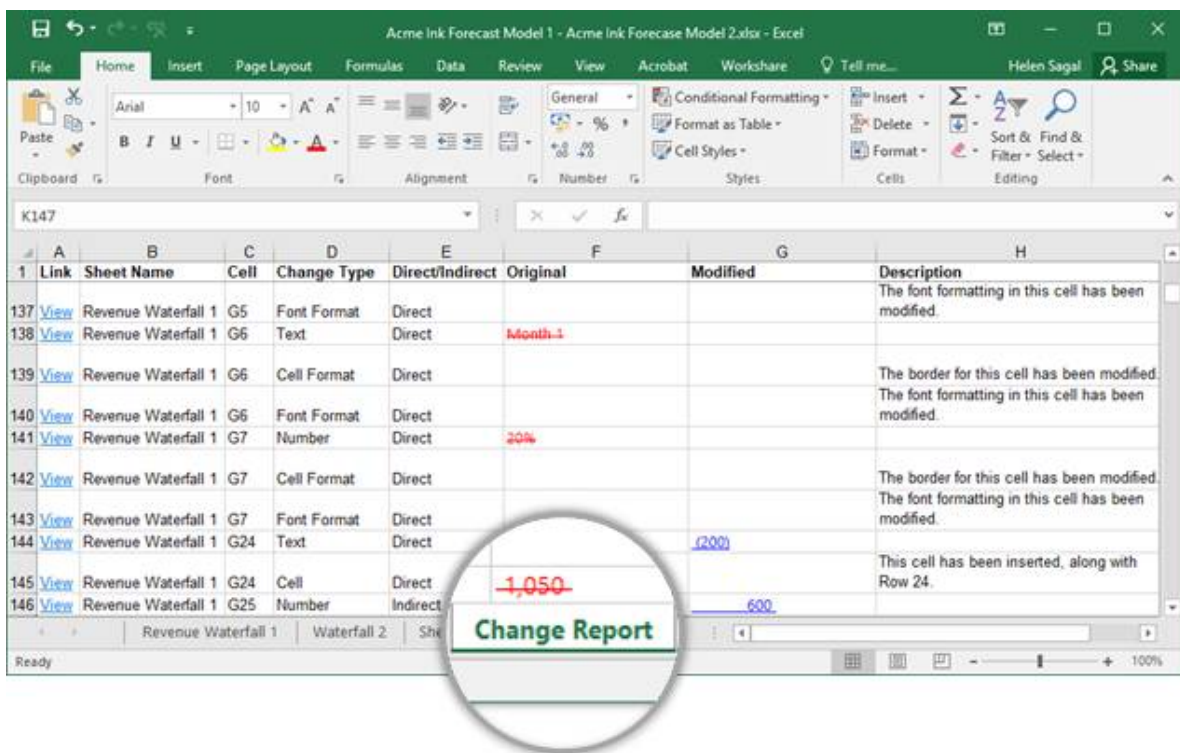


4. By default, all of the following will be included in the comparison:
 - **Change type filters:** All change type filters currently highlighted.

- **Indirect highlights:** All indirect changes.
- **Source formatting:** Source formatting from the original and modified files.

If you would like to exclude any of these options, deselect them.

5. If you don't want the saved comparison to open once the export is complete, deselect the **Open exported file** checkbox.
6. Click **Export**. The Save As dialog opens.
7. Navigate to a save location.
8. In the **File name** field, enter a name for the new file.
9. Click **Save**. The comparison is exported as a new Excel file.




The last worksheet of the saved comparison is the Change Report. It lists every change from the comparison (excluding any changes you chose not to include when you exported the comparison). To jump to a change, click its **View** option in the Link column.

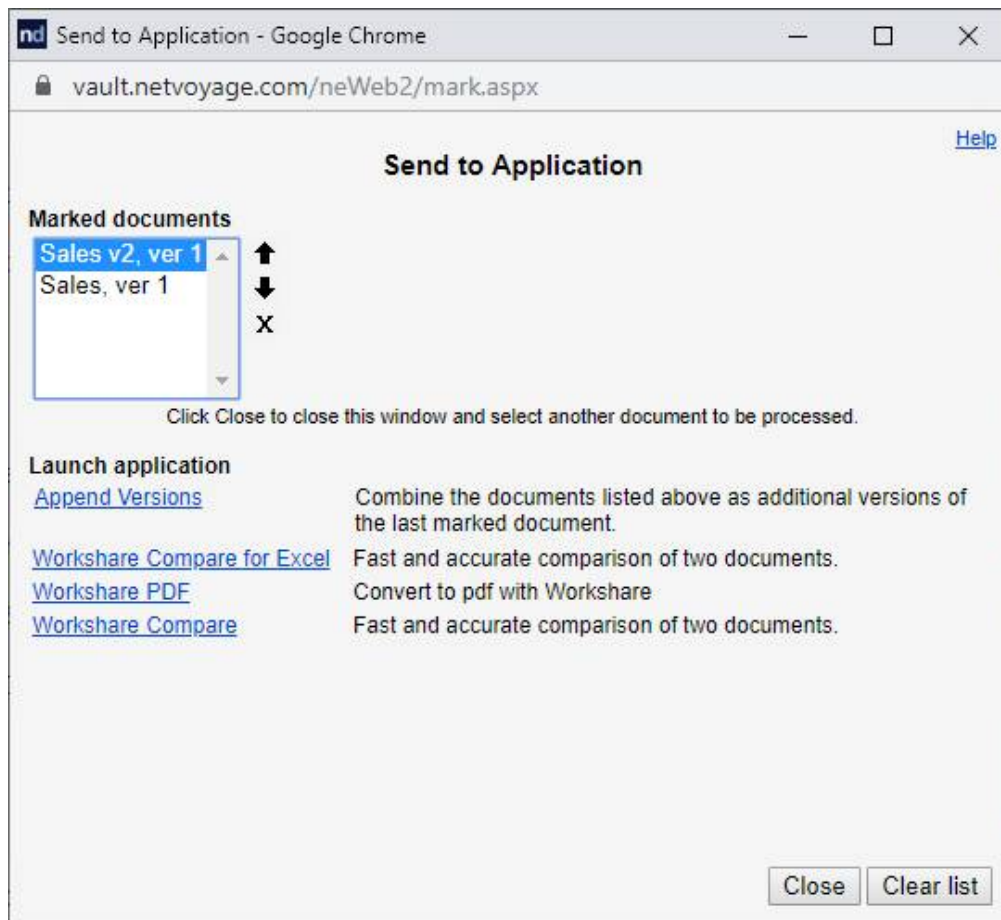
The other worksheets correspond to the worksheets in the original and modified files. Select a sheet to view its comparison.

Using Send to Application to Compare

From within NetDocuments, you can select two documents and compare them in Workshare Compare using the **Send to application** functionality. You can compare Word, PDF and Excel files in this way but you cannot compare PowerPoint files using **Send to application**.

To compare from NetDocuments:

1. In NetDocuments, select the two files you want to compare.
2. Right-click and select **Send to application** (or click  on the right and click **Send to application**).



3. Click **Workshare Compare** (if you selected Word or PDF files) or **Workshare Compare for Excel** (if you selected Excel files).

The selected files are compared. When the comparison is complete, the comparison is displayed in the Workshare Compare window or the Workshare Compare for Excel window.


Note: If the **Display document selection dialog when using Send to Application** parameter is selected in the Workshare Configuration Manager (**Integrations>NetDocuments**) then the document selection dialog is displayed and you can switch original and modified, add further documents to compare, change the rendering set and so on. In particular, for Word and PDF comparisons, you can change the comparison mode to Fast.

Converting to PDF

From within NetDocuments, you can select a document and convert it to PDF or PDF/A using Workshare Protect.

Note: You must have the full Professional installation for this to be available and not just the Compare installation.

To convert to PDF from NetDocuments:

1. In NetDocuments, select the document you want to convert.
2. Right-click and select **Send to application** (or click  on the right and click **Send to application**).

3. Click **Workshare PDF**. The *Convert to PDF* dialog is displayed.

The screenshot shows a dialog box titled "Workshare - Convert to PDF" with a close button (X) in the top right corner. The Workshare logo is in the top right. The main text says "Convert your document to PDF and configure its security options." The dialog is divided into four sections: "Save document as:" with radio buttons for "PDF (.pdf) Optimized for everyday usage" (selected) and "PDF/A (.pdf) Optimized for archiving", and a "Configure PDF Security" button; "Save as new document" (selected), "Save to My Computer", and "Save as related document" radio buttons; "Select pages to include:" with "All" (selected) and "Pages" (with a text input field and instruction "Enter page number and/or page ranges separated by commas (e.g. 2, 5-8)"); and "View and send" with "None" (selected), "Open PDF once created", and "Email PDF as attachment" radio buttons. At the bottom are "Help", "Preview", "Create", and "Cancel" buttons.

Workshare - Convert to PDF

Workshare

Convert your document to PDF and configure its security options.

Save document as:

☒ PDF (.pdf) *Optimized for everyday usage*

☐ PDF/A (.pdf) *Optimized for archiving*

Configure PDF Security

☒ Save as new document

☐ Save to My Computer

☐ Save as related document

Select pages to include:

☒ All

☐ Pages Enter page number and/or page ranges separated by commas (e.g. 2, 5-8)

View and send

☒ None

☐ Open PDF once created

☐ Email PDF as attachment

[Help](#) Preview Create Cancel

4. Select whether to convert to PDF or PDF/A.

5. Click **Configure PDF Security** to set PDF security options and remove metadata.

Workshare - PDF Security

Workshare

PDF security configuration

- ☐ Prevent printing
- ☐ Prevent editing of text
- ☐ Prevent the copying of text and/or graphics
- ☐ Prevent comments being added

Metadata cleaning

Cleaning Options 0 option(s) selected

Password protection

Specify a password for the generated PDF. Only users with the password can open the document.

Specify password

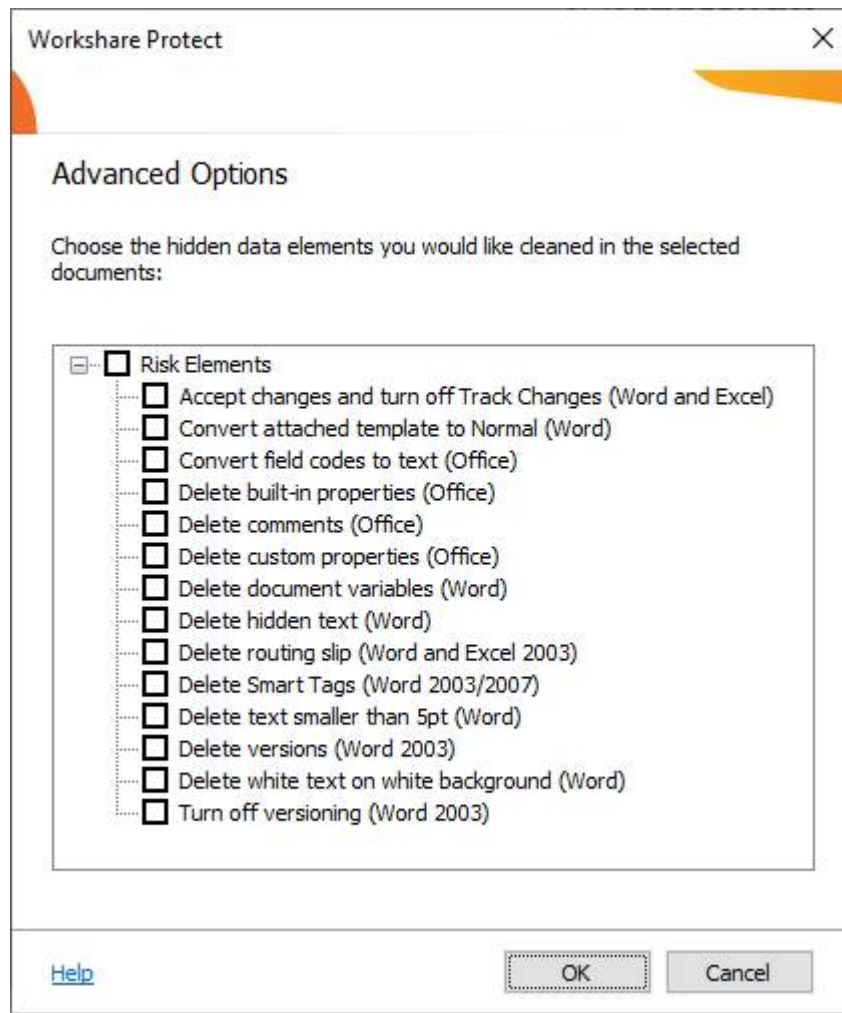
Confirm password

Apply Cancel

6. Select one or more of the following security options:
- **Prevent printing:** Prevents users from printing the PDF document.
 - **Prevent editing of text:** Prevents users with Adobe Distiller from editing the PDF document.
 - **Prevent the copying of text and/or graphics:** Prevents users from copying graphics or text directly from the PDF document.
 - **Prevent comments being added:** Prevents users with Adobe Distiller from adding comments to the PDF document.

Note: These options are disabled and cannot be selected if you selected PDF/A in step 2.

7. To specify what hidden data to remove before converting it to PDF, click **Cleaning Options**.



8. Select hidden data elements as required.
9. Click **OK**.
10. If required, set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, users can only open the PDF after entering this password.

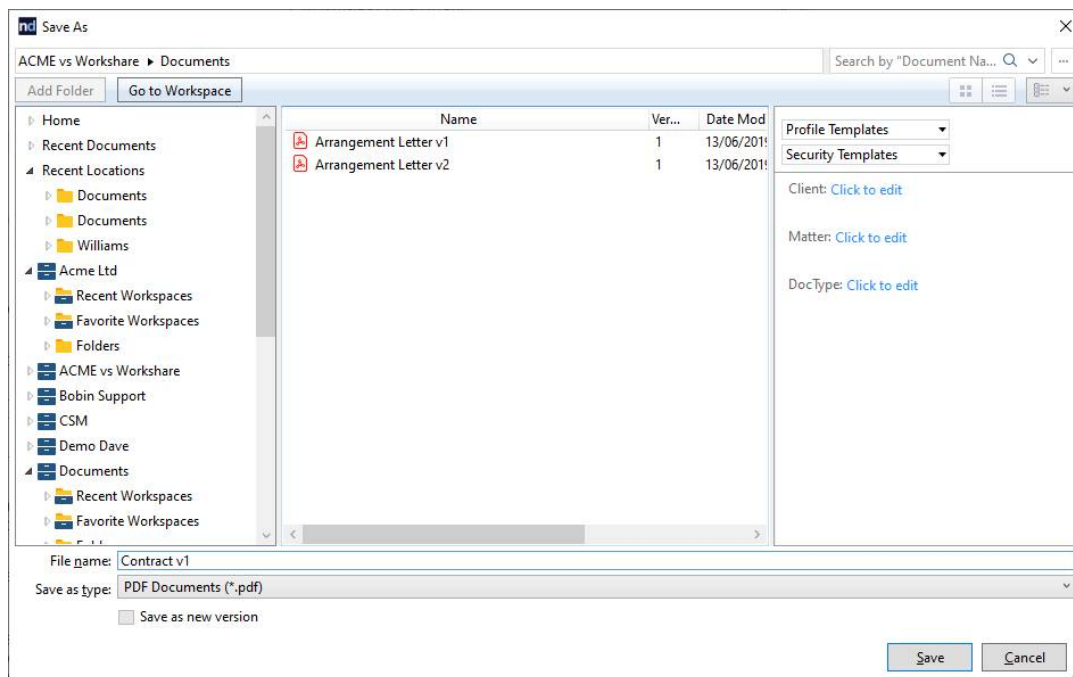
Note: If you selected PDF/A in step 2, you cannot set a password and the Password protection area is disabled.

11. Click **Apply**.

12. In the *Convert to PDF* dialog, select whether you want to save the PDF as a new document or related document in NetDocuments or whether you want to save it locally.
13. If you want to create a PDF of part of the document only, select the **Pages** radio button and specify a page range.

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

14. In the **View and send** area, select the **Open PDF once created** checkbox if you want the PDF to be opened once it has been created or select the **Email PDF as attachment** checkbox if you want the PDF to be attached to an email once it has been created.
15. If required, click **Preview** to view the document as a PDF.
16. Click **Create**.



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Revisions

Published for Workshare Professional 10.2 Revision 1: 29/8/19

Revised for Workshare Professional 10.3: 2/10/19

Revised for Workshare Professional 10.4: 10/12/19

Workshare Ltd., 20 Fashion Street, London E1 6PX www.workshare.com