Workshare 8

Installation Guide

Company Information

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Useful Information

This guide describes how to install and license Workshare Professional, Workshare Compare and Workshare Protect. The following information may also be useful.

Additional Documentation

In addition to this guide, the following guides may be useful: Workshare Professional User Guide, Workshare Professional Getting Started Guide, Workshare Compare User Guide, Workshare Compare Getting Started Guide, Workshare Protect User Guide, Workshare Protect Getting Started Guide, and Workshare Configuration Options. If you are interested in the concepts behind products from Workshare, you can read white papers and download product demos from www.workshare.com.

Contacting Customer Support

For technical help and support on Workshare products, please refer to: http://www.workshare.com/support/ or contact Workshare Customer Support on support@workshare.com.

Feedback

If you have any comments about Workshare Professional, Workshare Compare or Workshare Protect — ideas for improvements, new features or anything at all — please feel free to email our Product Management team at: feedback@workshare.com.

Table of Contents

Chapter 1. Installation Overview

This guide describes how to install and license Workshare Professional, Workshare Compare and Workshare Protect.

This chapter introduces provides an overview of the installation of Workshare as well as a list of system requirements. It includes the following sections:

- **System Requirements**, below, describes the system attributes required in order to install and run Workshare.

- **Installation Guidelines**, page 9, describes the recommended installation and deployment procedure for Workshare.

- **Workshare Installation Files**, page 12, describes the installation files and prerequisites for Workshare.

- **Important Information**, page 14, provides important information that should be read before installing, configuring and deploying Workshare.

- **Licensing**, page 20, provides information about the various licenses available for Workshare.

System Requirements

The system requirements for Workshare Professional 8, Workshare Compare 8 and Workshare Protect 8 are as follows:

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

Certified Environments

Workshare Professional 8, Workshare Compare 8 and Workshare Protect 8 have 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) for any help.

For details of which environments previous versions of Workshare Professional, Workshare Compare and Workshare Protect were certified against, refer to previous versions release notes at http://www.workshare.com/resources/user-guides.

> **Note**: Unless otherwise stated, all environments are the English version with the en-us language set.

Operating System:

- Microsoft Windows 8.1 (32 bit and 64 bit) + Japanese
- Microsoft Windows 8 (32 bit and 64 bit) + Japanese
- Microsoft Windows 7 SP1 (32 bit and 64 bit) + Chinese Simplified & French
- Microsoft Windows 7 (32 bit and 64 bit) – default UAC

> **Note**: Windows XP and Windows Vista are not supported in this release.

Citrix:

- Citrix XenApp 6.5
- Citrix XenDesktop 5.6

When running on the following:

- Microsoft Windows R2 Server 2008 SP1 (64 bit)

> **Note:** Check with your Citrix vendor about which Windows operating system supports your version of Citrix.

Microsoft Office System:

- Microsoft Office 2013 SP1 (32-bit)
- Microsoft Office 2013 (32-bit) + Japanese
- Microsoft Office 2010 SP2 (32-bit)
- Microsoft Office 2010 SP1 (32-bit) + Chinese Simplified & French
- Microsoft Office 2007 SP3 (32-bit)

Email System:

- Microsoft Outlook 2013 SP1 (32-bit)
- Microsoft Outlook 2013 (32-bit) + Japanese
- Microsoft Outlook 2010 SP2 (32-bit)
- Microsoft Outlook 2010 SP1 (32-bit) + Chinese Simplified & French
- Microsoft Outlook 2007 SP3 (32-bit)
- IBM Lotus Notes 8.5.3 FP4-FP6

> **Note**: Interactive Protect and the Secure File Transfer feature of Workshare Protect is not supported in a Lotus Notes environment.

SharePoint:

- Microsoft SharePoint 2013
- Microsoft SharePoint 2010
- Microsoft SharePoint Server 2007

DMS Integration (Workshare Professional and Workshare Compare only):

> *Note: Check with your DMS vendor about which Windows operating system supports your DMS.*

- **NetDocuments**

> *Note: The NetDocuments integration requires that Microsoft Internet Explorer is installed (the NetDocuments login screen is displayed in an IE iframe) although it does not have to be the default browser.*

- **Autonomy iManage:**
  - FileSite 8.5 SP3 Update 5
  - DeskSite 9.0 Update 4 (+ EMM)
  - DeskSite 8.5 SP3 Update 5
  - FileSite 9.0 Update 4 (+ EMM)

- **Open Text:**
  - eDOCS DM 5.3.0 COM only (Patch 5)
  - eDOCS DM 5.3.1 COM only (Patch 4)
  - eDOCS DM 5.3.1 COM only (Patch 5)

- **Worldox GX3**

> *Note: Workshare recommends WBGX Version ID: 6EB.688.D48 (Mar 28 2014) 11.0 or later.*

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

Installation Guidelines

This guide will take you through a typical Workshare installation. The general steps involved are as follows:

1. For Autonomy iManage DMS users, configure your Autonomy iManage server and client (described in *Chapter 4: Integration*).

2. Install Workshare on a single workstation (described in *Chapter 2: Installation*).

3. Use the Workshare Configuration Manager (Administrator Mode) to configure Workshare as you want it to work in your organization (described in *Chapter 3: Configuration*).

4. Save the configuration to a deployment script (reg or adm file) (described in *Saving Configuration Files* in *Chapter 3: Configuration*).

5. Deploy the configuration across your network using a deployment script so that Workshare will be configured uniformly across your organization.

6. Deploy Workshare across your network, specifying the LICFILE parameter so that it is licensed (described in *Chapter 5: Network Deployment*).

It is recommended that you follow the guidelines listed below when installing Workshare to ensure a smooth and trouble-free installation:

- Ensure that your system meets the recommended requirements for Workshare shown on page 9.

- Ensure that all important data is backed up prior to installation.

- Elevated/administrator privileges are required to install Workshare.

- Workshare MSI files should not be directly edited. Changes can be applied via a transform file (.mst) or other method of applying properties such as command line parameters.

- Transform files may be created via any third party software that supports Windows Installer technology.

- Workshare MSI files should not be repackaged. Certain custom actions that are contained in the original MSI file may be missed and may also prevent future upgrades.

- Workshare MSI files should not be patched with in-house authored MSP files as this may cause future upgrade issues and system instability.

- Additional customer specific files and Registry keys may be deployed alongside Workshare software as long as they do not interact or replace any files or Registry keys belonging to the product.

- No additional third party software should be bundled into any Workshare MSI.

If you have any queries about the installation of Workshare that are not dealt with in this guide, please contact Workshare Customer Support (details on page 3).

Workshare Installation Files

This section describes the Workshare executables, Windows Installer Packages and shared components.

Executables

A single, downloadable self-extracting executable will install Workshare Professional or Workshare Compare or Workshare Protect and (where necessary) the DMS integration. Workshare Professional and Workshare Compare can be installed to work with your local file system or with your DMS.

The installation executables are as follows:

Executable	Installs….
ProfessionalInstall-100.XXX.exe	Workshare Professional
WorkshareCompare-100.XXX.exe	Workshare Compare
WorkshareProtect-100.XXX.exe	Workshare Protect

where XXX is the build number.

On a single workstation, the easiest way to install Workshare is to simply run the install executable file and answer any questions asked. Where a manual installation per computer is not feasible, you can deploy Workshare to multiple workstations using methods described in *Chapter 5: Network Deployment*.

Update or Full Release?

The Workshare installation files will depend on the type of release:

- Fast track fixes: Individual fast track fixes will be sent to individual customers via an MSP file.

- Fix rollups: An update which contains a roll up of all fast tracks created within the last 8-12 weeks will be sent to all customers via an MSP, EXE or MSI file.

- Full product releases: Full product releases will be via MSI and EXE files only.

Prerequisite Components

The prerequisites for Workshare 8 depend on the version of the operating system and the version of Microsoft Office. They are described in the following table. Prerequisites for other versions of Workshare may be slightly different.

Workshare 8 is a native x86 application. It normally requires the x86 prerequisites for proper operation. The exception is the Microsoft .NET Framework which must have the appropriate x86/x64 version installed.

Prerequisite	Version	OS	Office	Notes
Microsoft .NET Framework 4.0	4.0.30319	Windows 7, Server 2008, Server 2008 R2	NA	
Microsoft Visual C++ 2010 SP1 Redistributable Package (x86)	10.0.40219	All (including x64 versions)	NA	
Microsoft Visual C++ 2010 SP1 Redistributable Package (x64)	10.0.40219	x64 OS versions	NA	The right-click handler is written in x64 code and requires this prerequisite.
KB935514 – Update for Office 2007	1.0.0	NA	Office 2007 pre SP1 only	
Microsoft Visual Studio 2010 Tools for Office Runtime Setup	10.0.40308	All	All	Visual Studio is NOT required.

> *Note: Microsoft .NET Framework should be installed first. The other prerequisite components can be installed in any order.*

For further information about each prerequisite, refer to *Appendix C: Workshare Prerequisites*.

Windows Installer Packages

If you need to extract the MSI it can be extracted from the executable using third party zip tools, and run directly. The MSIs that can be extracted from the executable files are as follows:

- **Workshare Desktop** – Workshare.Desktop.Dual.msi installs Workshare Desktop.
- **Workshare Professional** - Professional.msi installs Workshare Professional.
- **Workshare Compare** – WorkshareCompare.msi installs Workshare Compare.
- **Workshare Protect** – WorkshareProtect.msi installs Workshare Protect.

If you install using an extracted MSI, you must first install all the prerequisite components described above.

> *Note: Ensure that all the prerequisites and the Professional.msi, WorkshareCompare.msi and WorkshareProtect.msi are installed for all users on the computer. However, Workshare.Desktop.Dual.msi can be installed on a per user or per machine basis.*

Workshare PDF Publisher

When Workshare is installed it creates a printer called **Workshare PDF Publisher** in the user's **Printers** folder. This is the printer that Workshare uses to convert documents to PDF.

Important Information

Workshare Online Registration

When you include the Secure File Transfer module in your Workshare Professional 8 installation, your users will be registered against your online Workshare account. A validation email is sent to each user that has the Protect client installed on their desktop. Only one automatic email is sent and only to these users.

The installation of Workshare Professional (the Workshare Protect 8 module) installs the Workshare Outlook COM Addin and when a user first runs Outlook, Workshare obtains their email address and generates an account on Workshare using that email address and sends a validation email to that email address.

> *Note: Only if the Secure File Transfer module is included in the installation will a Workshare account be automatically created for each user.*

If you do NOT want your users to receive a validation email, you can disable the option BEFORE deploying Professional across your organization. This is done from the Workshare Admin Console - refer to http://workshare.force.com/knowledgebase/articles/Help_Articles/Configuring-Activation-Emails

Document Audit File

(This section is only relevant for Workshare Professional installations.)

Workshare Professional stores collaboration information in a document audit file (.W3 file). This method enables collaboration information to be stored within the safe confines of the DMS.

Workshare Professional and Local File Behavior

(This section is only relevant for Workshare Professional installations.)

In a local file system where the W3 files are stored in the same location as the original files, Workshare Professional detects when you try to move or save the original file to another location and enables you to move or save the W3 file too.

Save As Functionality

In a local file system, Workshare Professional provides a type of versioning functionality using the **Save As** command. When you perform a Save As operation on an original document, Workshare Professional detects that the document is part of a collaboration and asks if you want to keep the collaboration files (the W3 file) alongside the new document.
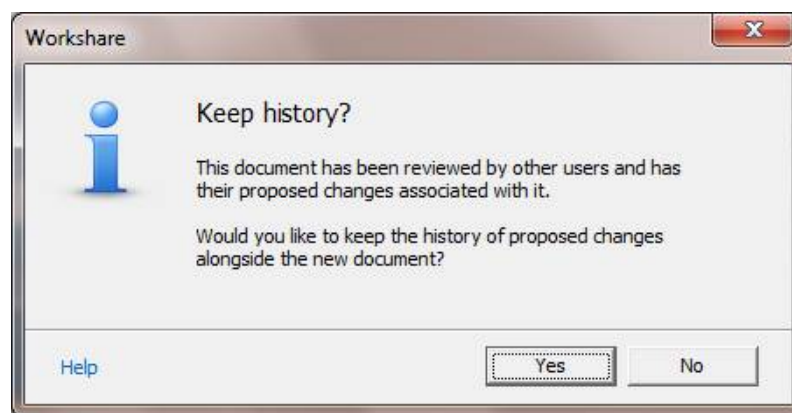
Clicking **Yes** saves the document in the specified location with the specified name and the W3 file is also copied to the same location. The W3 file is given the same name as the saved file with a **.W3** extension. Thus, in effect, you are saving a new version of the original document keeping the responses associated with it. Clicking **No** saves the document but does not copy over the W3 file.

Moving and Copying Files

In a local file system, Workshare Professional enables you to move a W3 file with the original file. If you manually copy or move an original document within the local file system, when you next open that document, Workshare Professional checks to see if the file is part of a previous collaboration and if the W3 file is still at the same location as the document. If it is not, the following message is displayed:
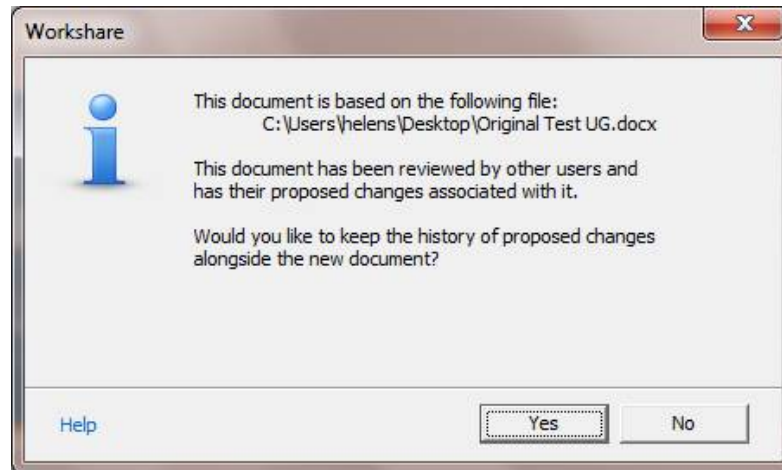
Clicking **Yes** copies the W3 file to the new location. Clicking **No** does not copy over the W3 file.

> *Tip! It is recommended that if you want to move or copy an original file, you should move/copy the W3 file with it.*

Workshare Configuration Assistant

The Workshare Configuration Assistant (WCA) is a program that completes the installation process. The WCA is not optional as it performs actions that are required to correctly install the product. The install process automatically runs the WCA silently.

Re-Running the WCA

Following installation, the WCA can be run as a separate executable for any of the following reasons:

- To repair or continue a previously incomplete installation
- To update an installation, such as to make Workshare compatible with a new DMS
- To install/uninstall specific Workshare features

When re-run, the WCA provides information on the progress of installation and any necessary messaging if any problems are encountered. If a problem is encountered, the user can access the online Workshare knowledge base which provides an extended description and, where possible, a solution to resolve the problem.

The executable is named **WMConfigAssistant.exe** and is found in the **Modules** folder of the installation directory. To be run, the WCA requires administration rights to the workstation.

The WCA executable can be run from the command line, from within a DOS window or using a batch (.bat) file. This should only be attempted by the network administrator or other qualified personnel. The WCA can be run silently, without any user interface and quietly, with a reduced user interface.

The WCA is also available from the Start Menu: Start > Programs > Workshare > Workshare Configuration Assistant.

To run the WCA from the command line, the following syntax should be used:

```
"C:\Program Files\Workshare\Modules\WMConfigAssistant.exe" /INSTALL /SILENT
/LOGFILE="\\InstallMachine\Workshare\Workshare.log"
```

Where the switches can be:

Switch	Value
SILENT	Indicates that the WCA is to be run silently, with no user interface.
QUIET	Indicates that the WCA is to be run with a reduced user interface.
LOGFILE	Name and location of the WCA log file. For example, **LOGFILE="\\server\share\ logfile.log"**. The log file can either be stored at a shared location or stored locally on the workstation.
	If a location is not specified for the log file it will be written to the local TEMP folder. By default the log file is named **WorkshareConfig.log**.
	The WCA log file will provide details of all the steps the WCA has taken and can be passed to Workshare if any difficulties are encountered.
	The log file is appended to, not overwritten, in order to retain all logged information. Therefore the latest details will be at the end of the log file.
LICFILE	Name and location of the license file. For example, **LICFILE="\\server\share\ Workshare.lic"**. The specified LIC file will be copied to the **Modules** folder of the Workshare installation directory.
NOTESINIFILE_ PATH	Location of the notes.ini file. This should be specified in non-standard IBM Lotus Notes environments to ensure that Workshare components are added correctly to the INI file by the install.

> *Note: The command must be entered on one line. You can use INSTALL, UNINSTALL, REINSTALL or REPAIR as the preceding switch. The use of " " should be used where there is character spacing in file paths.*

Workshare Ribbon

If you have created a custom ribbon tab for Microsoft Office, it is possible to add the buttons from the Workshare ribbon into that custom tab. The tab properties (name, buttons, grouping etc.) are defined in an xml resource file compiled into the binary file Workshare.Ribbon.Addin.dll. When the add-in loads up in the Microsoft Office application, it will look for an external file named Workshare.Ribbon.Addin.CustomOverride.xml in the Workshare Modules directory. If the file is present it will replace the default tab properties with the properties defined in the external file. The file Workshare.Ribbon.Addin.CustomOverride.Sample.xml in the Workshare Modules directory can be used as a template to modify the properties.

The following steps demonstrate how to modify the xml file in order to display the buttons found in the Workshare ribbon on a different custom tab named 'My Custom Tab'. It will assume that a different add-in has created a tab named 'My Custom Tab' with a tab id 'MyCustomTab'.

How to display the buttons from the Workshare ribbon inside an existing custom ribbon tab:

1. Open the file Workshare.Ribbon.Addin.CustomOverride.Sample.xml in a text or XML file editor.

2. Update the <customUI> node: Change the value of the **xmlns** property to match the equivalent value in your custom ribbon xml.

3. Update the <tab> node: Change the value of the **label** and **idQ** property to match the equivalent value in your custom ribbon xml.

> **Note**: If your custom ribbon xml does not contain an **idQ** property but an **id** instead, you will have to modify your custom ribbon xml and change the **id** property to **idQ**.

After completing steps 2 and 3, the xml should look similar to this:

```
<mso:customUI
xmlns:mso="http://schemas.microsoft.com/office/2006/01/customui"

            loadImage="LoadImage"

            onLoad="OnLoadRibbon"

            xmlns:cu="custom users tab">  <mso:ribbon
startFromScratch="false">

   <mso:tabs>

     <mso:tab  label="My Custom Tab" getVisible="GetItemVisible"
idQ="cu:MyCustomTab">...
```

4. Save the modified file as **Workshare.Ribbon.Addin.CustomOverride.xml** in the Workshare Modules directory.

5. Launch Microsoft Word to verify that the Workshare ribbon is not displayed and that the buttons are displayed on your custom tab.

Workshare Microsoft Office Integration

Workshare Professional/Compare/Protect can be installed with or without Microsoft Office integration. If you want to change the integration of Workshare Professional/Compare/Protect with Microsoft Office applications, re-run the Workshare Configuration Assistant (described on page 16).
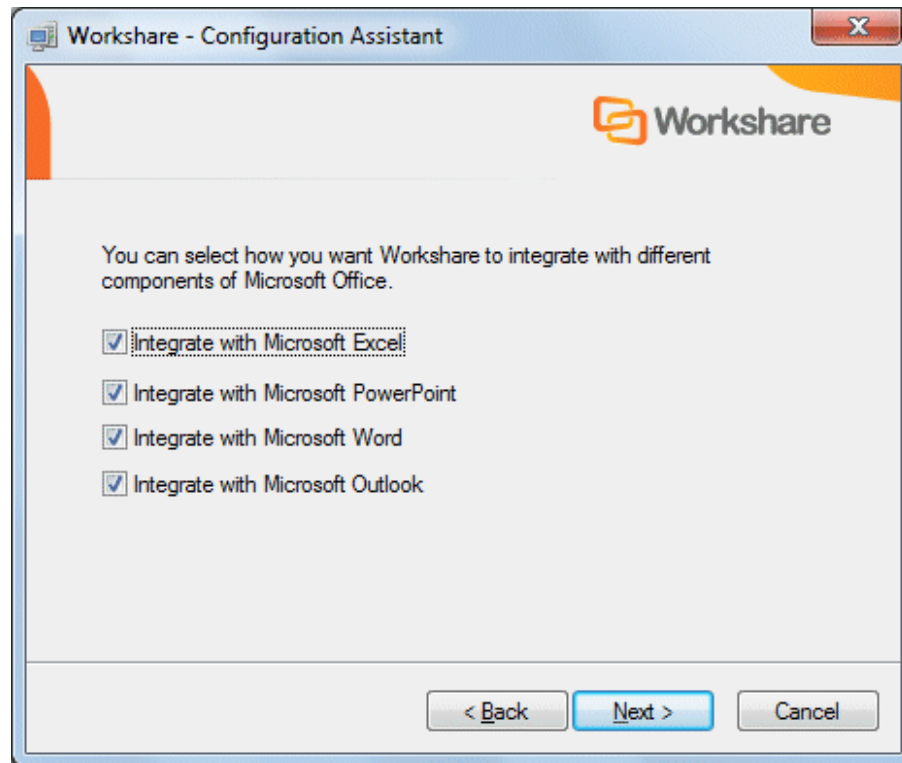
> **Note**: In Workshare 8, the **Integrate with Microsoft Outlook** option applies to the Workshare Compare Outlook integration and the Workshare Protect Outlook integration.

By deselecting the checkboxes, you can configure Workshare Professional/Compare/Protect to run without Microsoft Office integration. For example, by deselecting **Integrate with Microsoft Word**, there will be no Workshare Panel or Workshare menu/tab available in Microsoft Word. In this case, the comparison functionality is only available from the Workshare Compare application and the metadata removal functionality is only available when sending emails.

Registry (REG) File

Workshare configuration can be distributed using a Registry (REG) file. The REG file encapsulates all the Workshare configuration settings.

Using a Registry file, you can establish a global set of Workshare parameters that can be used to standardize the use of Workshare across your organization.

The REG configuration file is created using the Workshare Configuration Manager. For a full description of the Workshare configuration parameters and the Workshare Configuration Manager, refer to *Chapter 3: Configuration*.

Group Policy Template (ADM) File

Workshare configuration can be distributed via Group Policy using a group policy template (ADM) file. The ADM file encapsulates all the Workshare configuration settings that can be rolled out using Group Policy.

The ADM configuration file can be created using the Workshare Configuration Manager or using the ADM files supplied by Workshare.

Workshare OCR Functionality

Workshare Compare includes OCR technology to enable comparison of PDFs that have been created directly from scanning. Where OCR has not been used and PDFs contain pure images of text, Workshare Compare applies OCR to the PDFs before performing comparisons.

Licensing

Workshare can be licensed during installation or after installation. Licensing is effected using an authorization code or a license file issued by Workshare Ltd. Either or both of these can be used to license Workshare Professional/Compare/Protect.

There are several different license types, as follows:

Full Permanent License	Issued to end users who have purchased a Workshare application. This license provides full access to the application as well as integration with a specified Document Management System (Autonomy iManage, Hummingbird or SharePoint). This license enables the Review and Audit, Compare and Protect modules.
1, 2 3 Subscription License	This license is the same as the permanent license except it is valid for a specific period (one, two or three years) and not permanently.
Temporary License	Issued to end users who have purchased a Workshare application, as a form of interim licensing. If required, this type of license can be used prior to delivery of a permanent license.
Evaluation License	Valid for a specified period of time, for potential users currently evaluating the software.
Demo/Trial License	Valid for 30 days to enable users to try the software. Users are reminded on a daily basis how many days are left to run of the trial period.

Chapter 2. Installation

This chapter describes the installation and licensing procedure for installing Workshare on a single workstation. It includes the following sections:

- **Installing Workshare**, below, describes the step-by-step procedure required to install Workshare on a single workstation.

- **Uninstalling Workshare**, page 26, describes how to uninstall Workshare.

- **Licensing**, page 26, describes how to license Workshare.

The procedure for installing Workshare across a network is described in *Chapter 5: Network Deployment*.

Installing Workshare

The following procedure explains how to install Workshare Professional, Workshare Compare and Workshare Protect on a single workstation. Before beginning the installation procedure, make sure that all other programs are closed and disable any anti-virus software.

There is no need to uninstall previous versions of Professional. With an upgrade, any customized settings (public and user) are migrated whereas with a new install, the default settings are installed. If you are uninstalling and performing a new install and want to keep your settings, you should back up your configuration. Refer to *Upgrading to Workshare 8*, page 40.

During the installation process, you can select which Workshare features to install, such as Review, Compare, Protect (Metadata) and Protect (File Sharing) as well as which DMS integration(s) (if any) - Hummingbird Integration, Autonomy iManage Integration, Worldox Integration, SharePoint Integration or NetDocuments Integration.

> **Note**: *The secure file transfer by email is not supported in a Lotus Notes environment. In this case, installing the Secure File Transfer module will install the Workshare Desktop synchronization application only.*

The installation executables are as follows:

Executable	Installs….
ProfessionalInstall-100.XXX.exe	Workshare Professional
WorkshareCompare-100.XXX.exe	Workshare Compare
WorkshareProtect-100.XXX.exe	Workshare Protect

where XXX is the build number.

To install Workshare:

1. Double-click the install executable. The Workshare Installer is displayed.
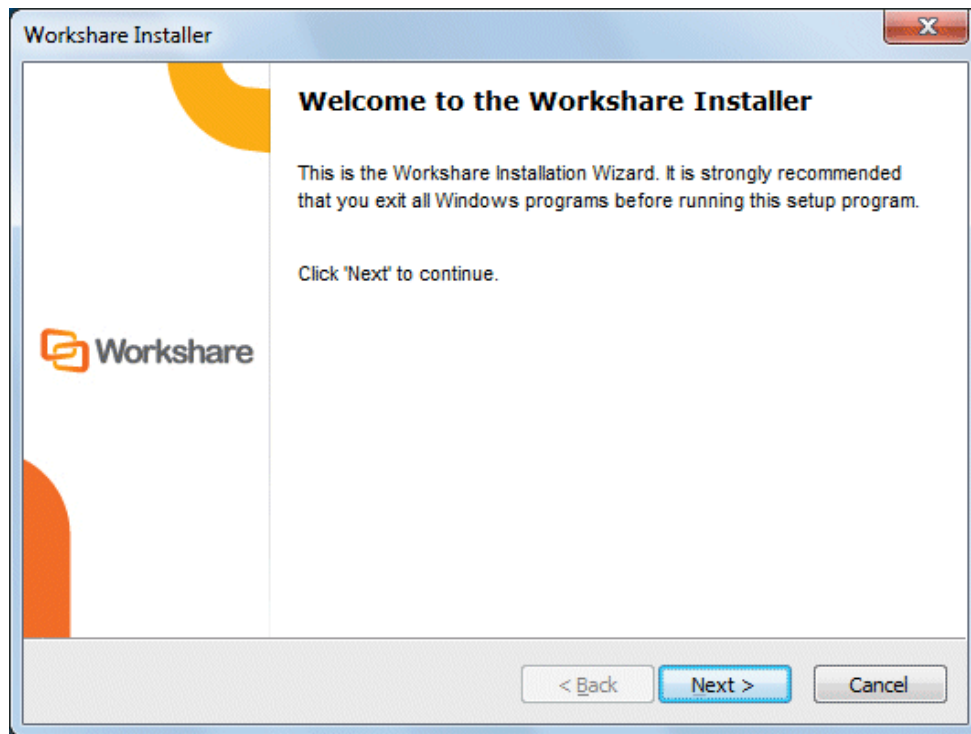
2. Click **Next**. The License Agreement screen is displayed.
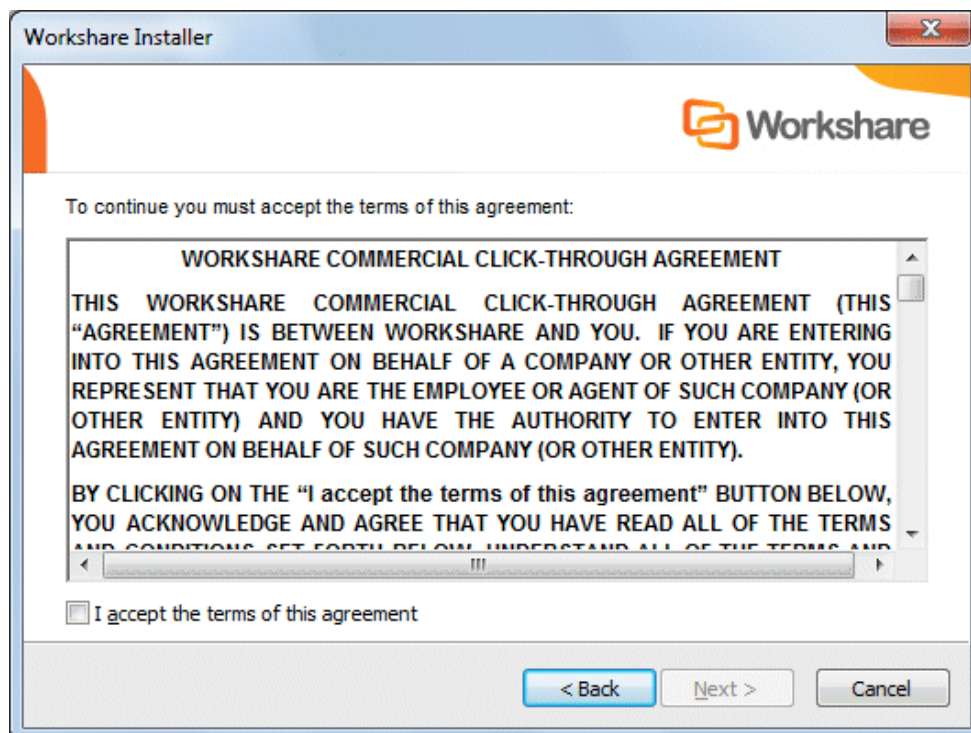
3. Read the agreement and select the **I accept the terms of this agreement** checkbox.

4. Click **Next**.
    ▫   When installing Workshare Professional, the following is displayed:
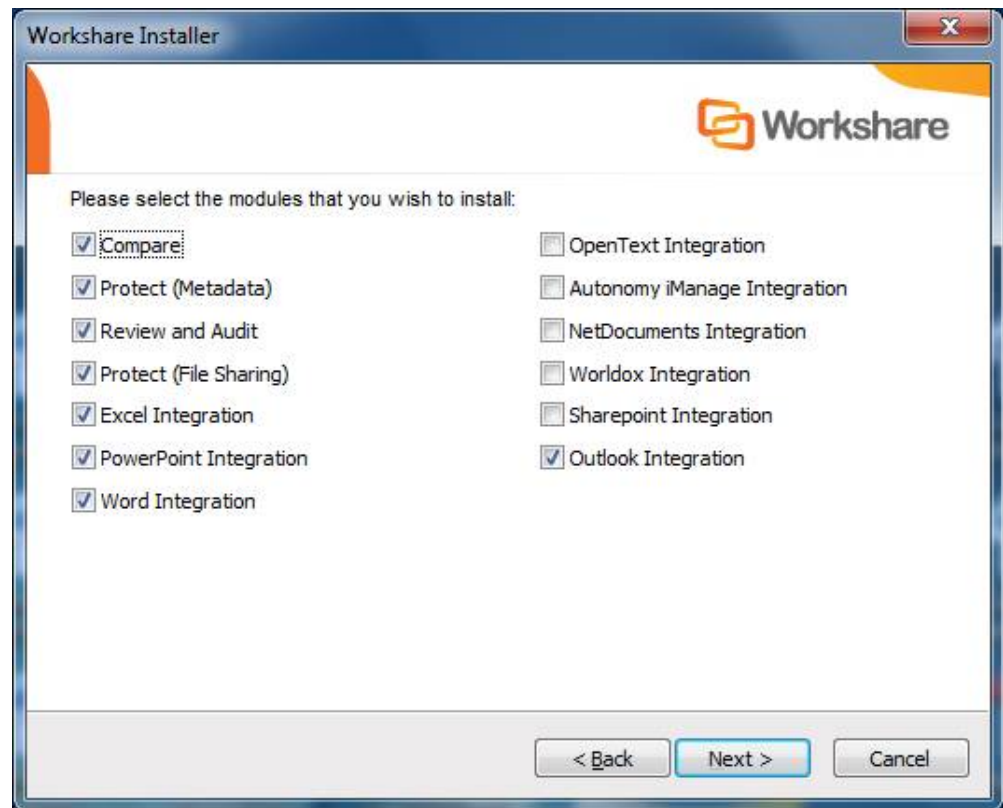
▫ When installing Workshare Compare, the following is displayed:
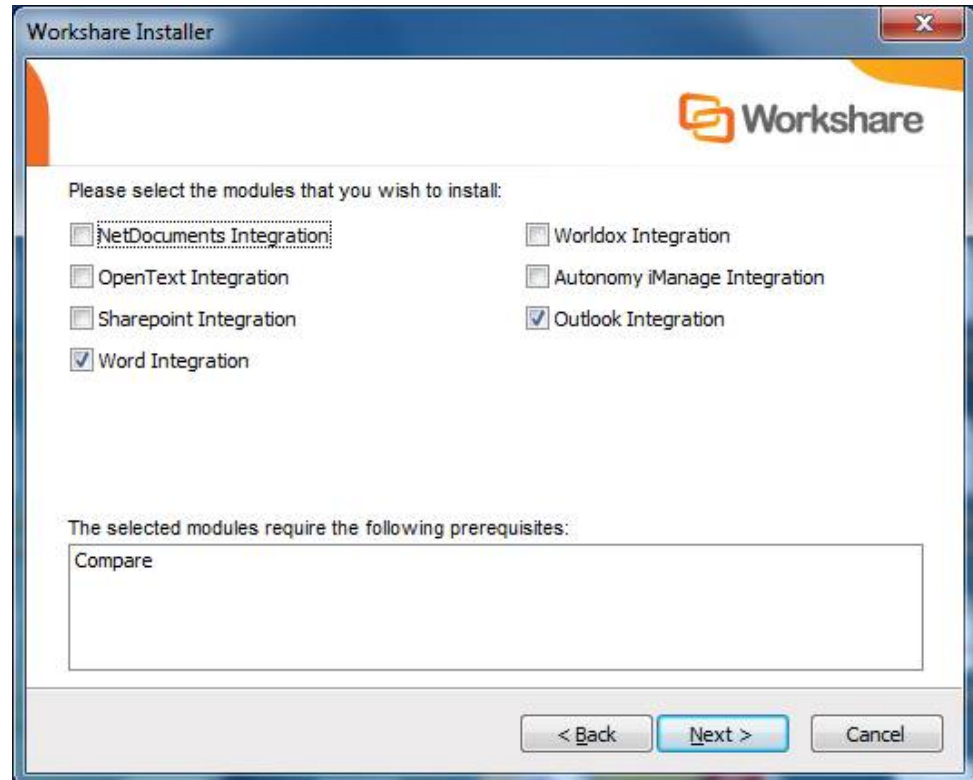
▫ When installing Workshare Protect, the following is displayed:
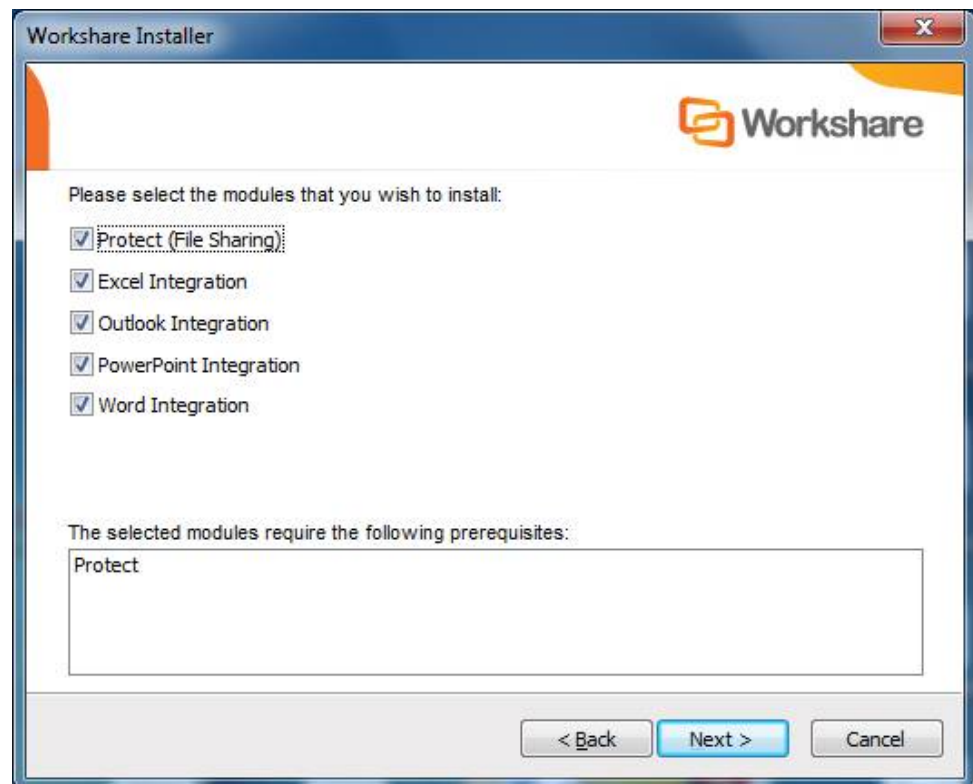
5. Select from the following as available and as required:

   Compare: Installs the Compare module enabling you to compare documents.

   Protect (Metadata): Installs the Protect module enabling you to clean metadata from documents.

   Review and Audit: Installs the Review and Audit module enabling you to collaborate on documents.

   Protect (File Sharing): Installs the Secure File Transfer module enabling you to send files to Workshare Online as well as synchronize between Workshare Online and your desktop.

   > *Note: When the Secure File Transfer module is installed, Workshare Online accounts are automatically created for all users. Refer to Workshare Online Registration, page 14.*

   Excel Integration: Integrates the selected modules within Microsoft Excel.

   PowerPoint Integration: Integrates the selected modules within Microsoft PowerPoint.

   Word Integration: Integrates the selected modules within Microsoft Word.

   OpenText Integration: Integrates the selected functionality within a OpenText DMS.

   Autonomy iManage Integration: Integrates the selected functionality within an Autonomy iManage DMS.

   NetDocuments Integration: Integrates the comparison functionality with NetDocuments.

   Worldox Integration: Integrates the selected functionality with Worldox.

   Sharepoint Integration: Integrates the selected functionality within Microsoft SharePoint.

   Outlook Integration: Integrates the selected modules within Microsoft Outlook.

6. Click **Next**. If you have Microsoft Office applications open, a message is displayed as follows:
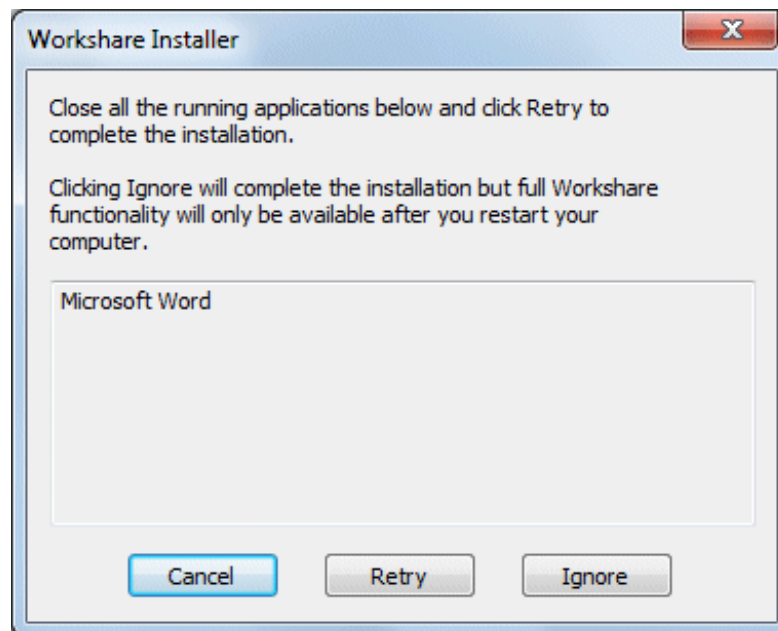
7. Proceed in one of the following ways:
   - Close all the open Microsoft Office applications and click **Retry**.
   - Click **Ignore**. Workshare will install but you must restart your computer after the installation is complete.

   Workshare creates the necessary folders and copy files. The installation process may take a few minutes. A progress bar indicates the progress of the installation.

8. After this process is completed, click **Finish**. This completes the installation of Workshare. For a full description of the Workshare functionality, refer to the relevant Workshare User Guide.

> **Note:** *Ensure that the system user has write access to the policy sets folder - ProgramData/Workshare/PolicySets.*

If required, you can now configure Workshare (described in *Chapter 3: Configuration*) or deploy Workshare across your network (described in *Chapter 5: Network Deployment*).

Uninstalling Workshare

Workshare Professional/Compare/Protect and Workshare Desktop should be uninstalled using the **Programs and Features** option in the Control Panel. Uninstalling Workshare Professional/Compare/Protect and Workshare Desktop will uninstall all the Workshare elements installed during the installation process.

> **Note:** *The uninstall process will not uninstall any prerequisites installed.*

Licensing Workshare

This section describes how to license Workshare using a license file or an authorization code. It also describes how to renew a subscription license.

When you include the Secure File Transfer module in your Workshare Professional 8 installation, your users will be registered against your online Workshare account. A validation email is sent to each user that has the Protect client installed on their desktop. Only one automatic email is sent and only to these users.

The installation of Workshare Professional (the Workshare Protect 8 module) installs the Workshare Outlook COM Addin and when a user first runs Outlook, Workshare obtains their email address and generates an account on Workshare using that email address and sends a validation email to that email address.

> **Note***: Only if the Secure File Transfer module is included in the installation will a Workshare account be automatically created for each user.*

If you do NOT want your users to receive a validation email, you can disable the option BEFORE deploying Professional across your organization. This is done from the Workshare Admin Console - refer to
http://workshare.force.com/knowledgebase/articles/Help_Articles/Configuring-Activation-Emails

Licensing Using License Files

A license file is a file with a LIC extension. You can license Workshare using the license file in either of the following ways:

- Copy the license file into the **Modules** folder of the Workshare installation directory on a Workshare workstation, for example, using copy/paste functions or a login script.

- Run the Workshare Configuration Assistant from a command line (described in *Re-Running the WCA*, page 16) and specify the LICFILE parameter.

Licensing Using Authorization Codes

License authorization codes consist of 12 numeric characters broken down into four groups of three, which are split by a dash or '-', for example '012-345-678-910'. Typically, an organization would use one authorization code to license all its users.

You specify the authorization code after installation upon launch of a Microsoft Office application. You can also license Workshare using the authorization code in either of the following ways:

- From the Workshare Configuration Manager, page 28

- Using WmLicGen.exe, page 28

To license Workshare:

1. After installation, launch a Microsoft Office application, for example, Microsoft Word. A reminder screen is displayed, such as the following:
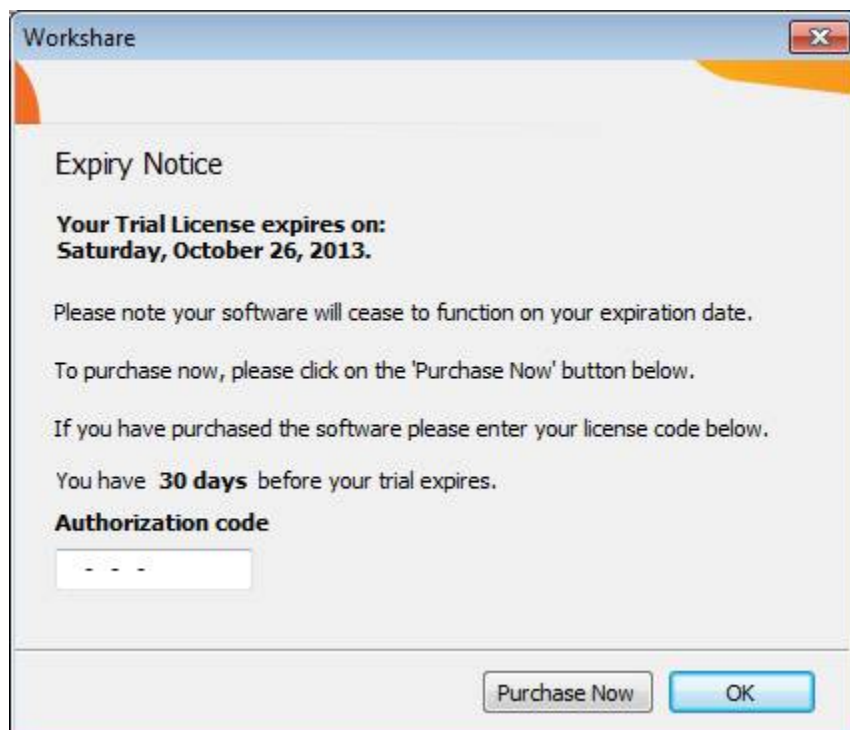
2. Enter your authorization code.

In order for license authorization codes to be validated, each client workstation requires an Internet connection. If the user is connecting to the Internet using a proxy server, Workshare will use the proxy server settings from Internet Explorer by default. In addition, it is possible to manually specify the proxy server details if they are not set in Internet Explorer. When a license authorization code is submitted, it is validated by the Workshare Licensing Authorization Server and a license is written to the **Modules** folder of the Workshare installation directory.

> **Note:** *The workstation name is recorded on the Workshare Licensing Authorization Server. No other details are recorded.*

It is possible to check connectivity to the Workshare Licensing Authorization Server in two ways:

- In an Internet browser session, enter http://las.workshare.com/CheckConnection in the address line. (Note that the text is case sensitive.) If the connection is successful, the message "You have successfully contacted the Workshare Licensing Authorization Server for external clients (Port 80)" is received.

- From the command line, ping the Workshare Licensing Authorization Server. Enter **"ping las.workshare.com"**. If the connection is successful, a reply is received from the Workshare Licensing Authorization Server.

Once the license is validated, Workshare will create a license file (with a LIC extension) and place it in the **Modules** folder of the Workshare installation directory. In order for Workshare to create a valid license file, the user will require read/write access to the **Modules** folder.

Licensing from the Workshare Configuration Manager

If you are licensing Workshare after installation and you are using an authorization code, you can license Workshare using the Workshare Configuration Manager.

To license Workshare from the Workshare Configuration Manager:

1. Access Administrator Mode of the Workshare Configuration Manager, as described in *Accessing the Workshare Configuration Manager*.

2. Select the **Licensing** tab.

3. Click **Get License**. You are prompted to enter your license authorization code.

4. Enter your authorization code and click OK.

Licensing Workshare Using WmLicGen.exe

If you are licensing Workshare after installation and you are using an authorization code, you can license Workshare using a command line utility called WmLicGen.exe.

WmLicGen.exe is located in the **Modules** folder of the Workshare installation directory. This executable can be run individually on each workstation or can be deployed to run on multiple workstations, for example, as part of login script.

To license Workshare using the WmLicGen.exe method, the following syntax should be used:

```
WmLicGen.exe /GET XXX-XXX-XXX-XXX
```

Where XXX-XXX-XXX-XXX is your authorization code.

The switches available are as follows:

Switch	Value
No switches	Lists all licenses on system.
?	Displays help.
Get <Auth Code>	Gets the license specified by Auth Code.
Release <Auth Code>	Releases the license specified by Auth Code.
Renew <Auth Code>	Renews the license specified by Auth Code.
Release_All	Releases all licenses with authorization codes.
Renew_All	Renews all licenses with authorization codes.
PORT=X	Specifies the proxy server port number for HTTP traffic (where X is the port number).
ADDRESS=X	Specifies the proxy server address (where X is the name or IP address of the proxy server).

Note: When working with a proxy server, you must specify both the PORT and ADDRESS switches.

Renewing a Subscription License

One month before your subscription license expires, you can choose to receive a popup notice on a daily basis that alerts you to when your license expires.

Proceed in any of the following ways:

- Enter your new or renewed authorization code and click **OK**. Your license is updated and the Expiry Notice is not displayed again.

- Click **OK**. The Expiry Notice will be displayed again on the following day.

- Click **Remind me Later**. The Expiry Notice will be displayed again in 7 days and every 7 days until 7 days before the expiration date when it will be displayed on a daily basis.

- Click **Purchase Now**. You are directed to the Workshare website where you can purchase a new license.

Turning Expiry Notice On/Off

You can prevent the Expiry Notice from displaying on a machine if you do not want users to view the popup. It is recommended that Administrator machines do display the popup to alert for expiring licenses. The expiry notice option can be turned off by creating the Registry value **ShowExpiryReminder** in the Registry key SOFTWARE\Workshare\Options\8.00\Internal\License with a string value of **False**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user.

Purchasing New Licenses

Visit the Workshare website for ways to purchase a new license. If you have a license (LIC) file, relicense Workshare using the methods described in *Licensing Using License Files*, page 26. You will need to replace any existing license files with the updated one. If you purchase an authorization code (you may be given a new code or advised that your existing code has been updated to reflect the new subscription period), relicense Workshare by entering the code into the Expiry Notice dialog or by using WmLicGen to release and get a license (described in *Licensing Workshare Using WmLicGen.exe*, page 28) or by using the method below.

Renewing a License on a Single Machine

This procedure involves releasing the existing expired (or about to expire) license and retrieving the new/updated license. It MUST be performed even if your authorization code has not changed.

To renew your license:

1. Access Administrator Mode of the Workshare Configuration Manager, as described in *Accessing the Workshare Configuration Manager*.

2. Select the **Licensing** tab.

3. Select a feature and click **Release License**. A confirmation message is displayed.

4. Click **Yes**. All features with the same selected authorization code are deleted.

5. Click **Get License**. You are prompted to enter your license authorization code.

6. Enter your authorization code and click **OK**.

Renewing Licenses across your Network

You can re-license Workshare across your network in either of the following ways:

- Replace an existing expired license file in the install directory (by default, Workshare/Modules) with an updated license file that has been created from the new subscription dates. This can be done as part of a login script.

- Run WmLicGen.exe (a command line utility) on the workstations, for example, as part of login script. WmLicGen.exe is installed as part of the installation and must be run from the installation directory. A sample script is provided below which assumes that you have installed to the default location (%ProgramFiles%\Workshare\Modules).

```
c:
cd c:\program files\Workshare\Modules
WmLicGen.exe /renew_all
```

Chapter 3. Configuration

This chapter describes how to use the Workshare Configuration Manager to configure Workshare. It includes the following sections:

- **Introducing the Workshare Configuration Manager**, below, provides an overview of the Workshare Configuration Manager and how you can use it to customize Workshare behavior to suit your organization's requirements.

- **Accessing the Workshare Configuration Manager**, page 33, describes how to access the Workshare Configuration Manager and its parameters.

- **Setting Parameters**, page 35, describes how to save configuration parameters to a configuration file as well as deploy the configuration file to other Workshare workstations.

- **Deploying Configuration Settings**, page 36, describes how to save policy sets and distribute them to other Workshare workstations.

- **Registry Configuration**, page 40, describes additional configuration performed directly in the Registry.

Introducing the Workshare Configuration Manager

The Workshare Configuration Manager is a separate configuration utility that enables you to configure Workshare Professional/Compare/Protect and the way they behave as well as modify the configuration of the Default profile (via the parameters in the Protection category).

> **Note**: A profile is a set of policies which contain parameters applied by Workshare Protect when determining content risk.

Administrator Mode and User Mode

The Workshare Configuration Manager has two modes as follows:

- **Administrator Mode**: This mode should be used by administrators to make changes to the default settings on the local machine. Settings made are saved in HKEY_LOCAL_MACHINE in the Registry.

- **User Mode**: This mode should be used by users to make changes to the Workshare configuration to suit their own personal preferences on the local machine. Other users could log in and they would not have the same configuration settings. Settings made are personal to the user and saved in HKEY_CURRENT_USER in the Registry.

When Workshare is installed, the default configuration settings (factory defaults) are included in the installation and the Registry is empty of any of the Workshare Configuration Manager configuration settings. Once an administrator clicks **Apply to Local Machine** in the Administrator Mode of the Workshare Configuration Manager, the Registry (HKEY_LOCAL_MACHINE) is updated with any changes. Once an administrator clicks **Apply to Current User** in the Administrator Mode of the Workshare Configuration Manager, the Registry (HKEY_ CURRENT_USER) is updated with any changes. Additionally, when a user clicks **Apply** in the User Mode of the Workshare Configuration Manager, the Registry (HKEY_CURRENT_USER) is updated with any changes.

When determining what value to assign to each configuration parameter, or when generating the Client Default policy, Workshare looks in the following locations in the following order:

1. HKEY_LOCAL_MACHINE just for the **IgnoredUserOverrides** key to see what parameters have been locked by the administrator

2. HKEY_CURRENT_USER

3. HKEY_LOCAL_MACHINE

4. WMOption.dll which contains an XML file with the factory defaults

It is important to remember that a user's preferences will take precedence over the default settings and the factory defaults. However, configuration parameters can be locked so that a user is unable to change the value of any given parameter.

You can use Administrator Mode of the Workshare Configuration Manager to establish global settings - once you have finalized the configuration, you can save the settings as an ADM or REG file and deploy to the Workshare workstations in your network. Refer to *Deploying Configuration Settings*, page 36.

The Workshare Configuration Manager can be installed as a standalone application if required. This would enable you to establish a global set of configuration parameters and deploy them company wide. As a standalone application, only the Administrator Mode of the Workshare Configuration Manager is available.

The Workshare Configuration Manager – User Mode will only show those options which are applicable to the modules which are currently configured for that user. The Administrator Mode will show all options for Workshare Professional, Compare and Protect regardless of which product is installed and what modules are configured.

Client Default Policy

When Workshare is checking email attachments or open Microsoft Office documents for content risk or metadata, it uses the Client Default policy to determine if there is a risk. The Client Default policy is a set of parameters configured in the Protection category of the Workshare Configuration Manager and saved in a file called WorkshareClient.runtimepolicy file.

The WorkshareClient.runtimepolicy file is automatically generated from the Registry in the following scenarios:

Action	Location of WorkshareClient.runtimepolicy
Workshare Installation	ProgramData/Workshare/PolicySets/ClientProfiles/Default
Re-running the Workshare Configuration Assistant	ProgramData/Workshare/PolicySets/ClientProfiles/Default
Applying changes in Administrator Mode of the Workshare Configuration Manager	ProgramData/Workshare/PolicySets/ClientProfiles/Default
Applying changes in User Mode of the Workshare Configuration Manager	Users/[current user]/AppData/Roaming/Workshare/ PolicySets/ClientProfiles/Default
Changing Registry values in the Registry which correspond to the Protection category options	Users/[current user]/AppData/Roaming/Workshare/ PolicySets/ClientProfiles/Default

Note: If you do not want the default policy files to be automatically regenerated in these scenarios, ensure the Enable automatic generation of default profile parameter (Protection>Administration category) is NOT selected. If this option is set off BEFORE the installation of Workshare, you must ensure you have created and placed your own security policy in the Client Default folder in the ProgramData/Workshare/PolicySets/ ClientProfiles location.

When applying the Client Default policy, Workshare will look first in the User location (Users/[current user]/ AppData/Roaming/Workshare/PolicySets/ClientProfiles/Default) and if it does not find a WorkshareClient.runtimepolicy file there, it will look in the Public location (ProgramData/Workshare/PolicySets/ ClientProfiles/Default).

Note: If you want to create additional security policies, you should use Workshare Policy Designer and save each .runtimepolicy in a separate directory in ProgramData/Workshare/PolicySets/ClientProfiles.

Accessing the Workshare Configuration Manager

When the Workshare Configuration Manager is installed as a standalone application, only the Administrator Mode is available and it is accessed from the Start menu.

The Workshare Configuration Manager – User Mode can be accessed from within Microsoft Word or from the Start menu.

To access the Workshare Configuration Manager from Microsoft Word:

1. In Microsoft Word, click **Options** in the *Workshare* tab, **Options** group. The Options page is displayed in the Workshare Panel.

2. Click **Workshare Configuration**. The Workshare Configuration Manager opens in User Mode.

3. To access Administrator Mode, click **Launch Administrator Mode**.

To access the Workshare Configuration Manager from the Start menu:

- When the Workshare Configuration Manager is installed as a standalone application, from the Start menu, select **All Programs** > **Workshare** > **Workshare Configuration**. The Workshare Configuration Manager opens in Administrator Mode.

- When the Workshare Configuration Manager is installed as part of Workshare, from the Start menu, select **All Programs** > **Workshare** > **Workshare Configuration**. The Workshare Configuration Manager opens in User Mode. To access Administrator Mode, click **Launch Administrator Mode**.

To access the Workshare Configuration Manager from Workshare Compare:

1. Open Workshare Compare.

2. From the Logo menu, select **Configuration Manager**. The Workshare Configuration Manager opens in User Mode.

3. To access Administrator Mode, click **Launch Administrator Mode**.

In Administrator Mode, the state of the options reflects the settings in HKEY_LOCAL_MACHINE in the Registry.

> **Note**: *In order to access Administrator Mode, you must have local administrator rights. In Windows Vista and above, when UAC (user access control) is enabled, the User Access Control dialog is displayed when you click* **Launch Administrator Mode**. *If you do not have administrator rights, you can enter a user name and password to elevate you to administrator. If you do have administrator rights, you need to allow the Workshare Configuration Administrator Console (Workshare Configuration Manager) to access this computer. Click Yes and Administrator Mode is launched.*
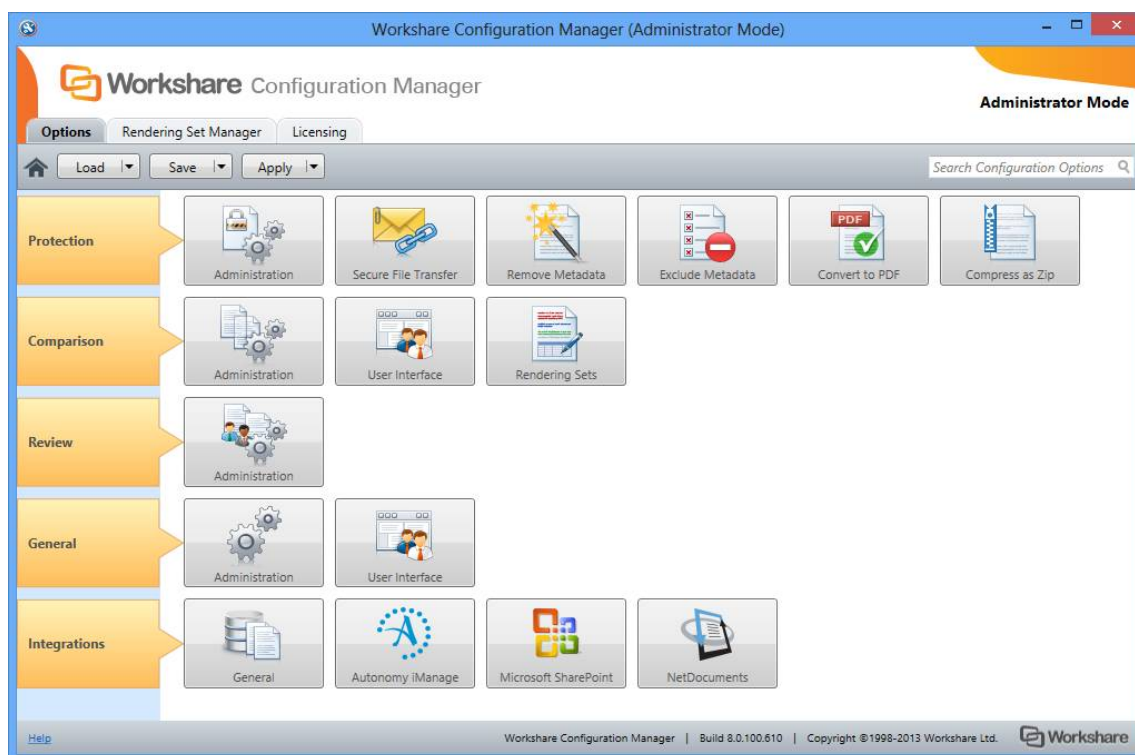
The configuration parameters for Workshare are grouped into categories (such as Protection, Comparison) and sub-categories (such as Administration, User Interface). In User Mode, categories are available according to your installation – Workshare Professional, Workshare Compare or Workshare Protect. Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in *Workshare Configuration Options*.

Searching Parameters

If you know the name of a parameter (or part of its name) but not its location, you can search the Workshare Configuration Manager using the search box on the top right.
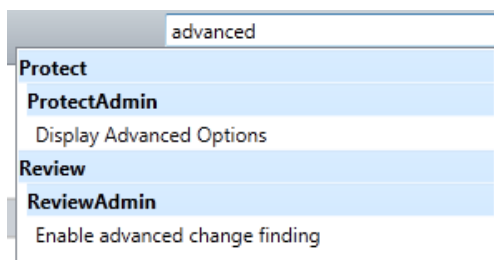
Click the parameter in the results list and the relevant category and sub-category is displayed in the Workshare Configuration Manager.

Setting Parameters

Most parameters in the Workshare Configuration Manager are set by selecting or deselecting a checkbox. There are also some that require you to enter a value in a text box.

To specify parameters:

1. In the Workshare Configuration Manager, select a category and then a sub-category.

2. Set a value for a parameter by selecting or deselecting the checkbox or by entering a value in the text box.
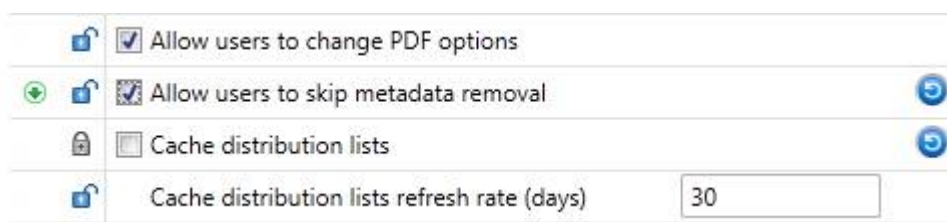
3. Click the padlock icon to unlock/lock a parameter. When you lock a parameter, a user is not able to change the setting.

> *Note: The* *icon to the right of a parameter indicates that the parameter value has been changed. In Administrator Mode, the green arrow deployment icon is shown when a parameter will be included in a deployment script.*

4. Continue to select categories and sub-categories and specify parameters as required.

5. Save your settings by clicking **Apply to Local Machine**. The Registry (HKEY_LOCAL_MACHINE) is updated with any changes.

   A confirmation message is displayed once the settings have been saved.

6. Click **OK**.

> *Note: The* *icon is no longer displayed to the right of changed parameters but the green arrow deployment icon will remain.*

Recipient Checking

You can specify different metadata removal settings for email attachments sent internally and externally. For example, you may want to remove all hidden data when sending emails externally, but only remove track changes and hidden text when emailing internally. Workshare Protect determines whether a recipient is external or internal as follows:

Workshare Protect takes each recipient in the **To**, **Cc** and **Bcc** fields, and looks them up in the configured address book(s). Usually this is the contacts list or local address book (on your machine) and the global address book (on the server).

> *Note: To ensure that Workshare Protect can integrate with the local and global address books when users are offline, please refer to Chapter 4: Integration.*

For each address there are three possible outcomes:

- The address does not exist in any address book. This is then processed as external.

- The address is a distribution list. In this case, the address of each member of the distribution list is checked.

- The address exists in one of the address books. If so, Workshare Protect does a further check that checks the type of address. Either it will be an Exchange\Notes address (meaning the address exists on the email server), or it will be an SMTP address (meaning the email will be routed via the Internet). If it is a server address, it is processed as internal. If it is an SMTP address, it is processed as external.

When deciding which metadata removal options to apply, each recipient is checked. If an external recipient is found, external metadata removal settings are applied. Only if all recipients are internal, are internal metadata removal settings applied.

> *Note: Using the **Treat the specified addresses as internal (Outlook)** parameter (**Protection > Administration** category), you can specify external email addresses that you would like to be treated as internal for the purpose of Workshare Protect applying policies.*

Deploying Configuration Settings

In Administrator Mode, you can save the configuration settings as an ADM or REG file. This will enable you to distribute these settings to other machines without having to manually set the options on each machine. You set the configuration parameters for Workshare in a test installation or on any workstation with the Workshare Configuration Manager installed, save the configuration settings in an ADM or REG file and then deploy them to other Workshare workstations. This saves time and enables a consistency within your organization.

Additionally, you can save the configuration settings as a WSO file (Workshare Options file). A WSO file can be loaded in the Workshare Configuration Manager so you can restore the settings at some point in the future. This enables you to keep a work-in-progress or project file.

Finally, Workshare has created ADM files which contain all the options and their default values. These files are very similar to the files created by the Workshare Configuration Manager but contain placeholders for unconfigured DMS server. Contact Workshare Technical Support for these files.

Saving Configuration Files

Configuration settings are saved in Administrator Mode of the Workshare Configuration Manager.

To save configuration settings:

1. In Administrator Mode of the Workshare Configuration Manager, specify configuration parameters as required. Refer to *Setting Parameters*, page 35.

2. Click the arrow on the **Save** button and select from the following:
   - **Save as Workshare Options**: To save the settings in a WSO file which can be loaded/opened in the Workshare Configuration Manager at a later time.
   - **Save Deployment Script**: To save the settings in an ADM or REG file which can be used to deploy to other workstations.

3. When selecting to save as a Workshare Options file, a *Save As* dialog is displayed.
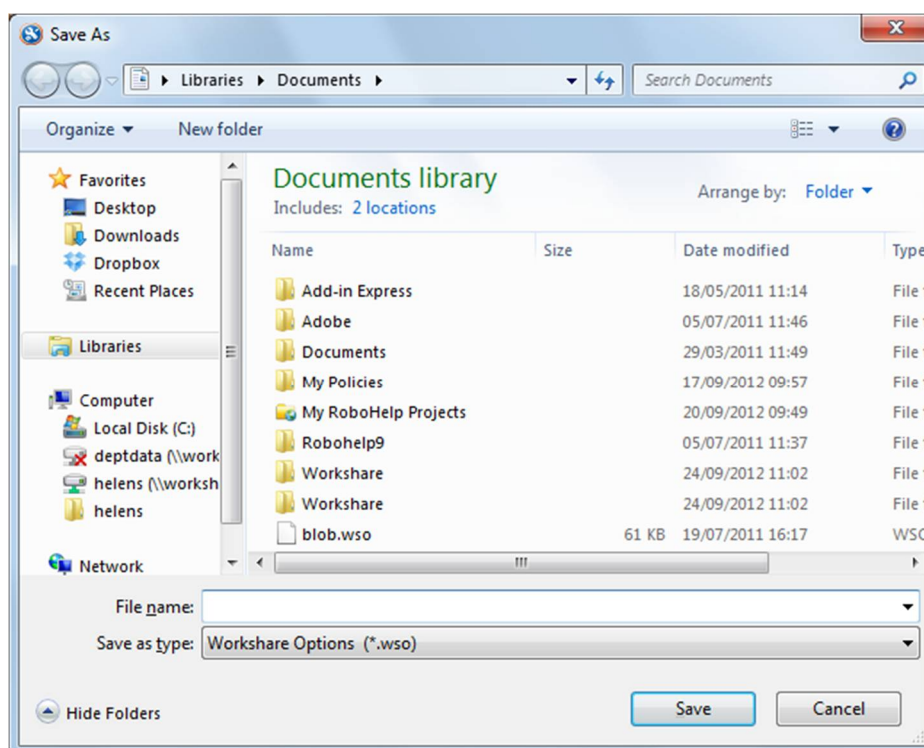
4. Name the file as required, navigate to the save location and click **Save**. The settings are saved in a WSO file which can be loaded in the Workshare Configuration Manager at a later time.

5. When selecting to save as a deployment script, the *Deployment Script Settings* dialog is displayed.
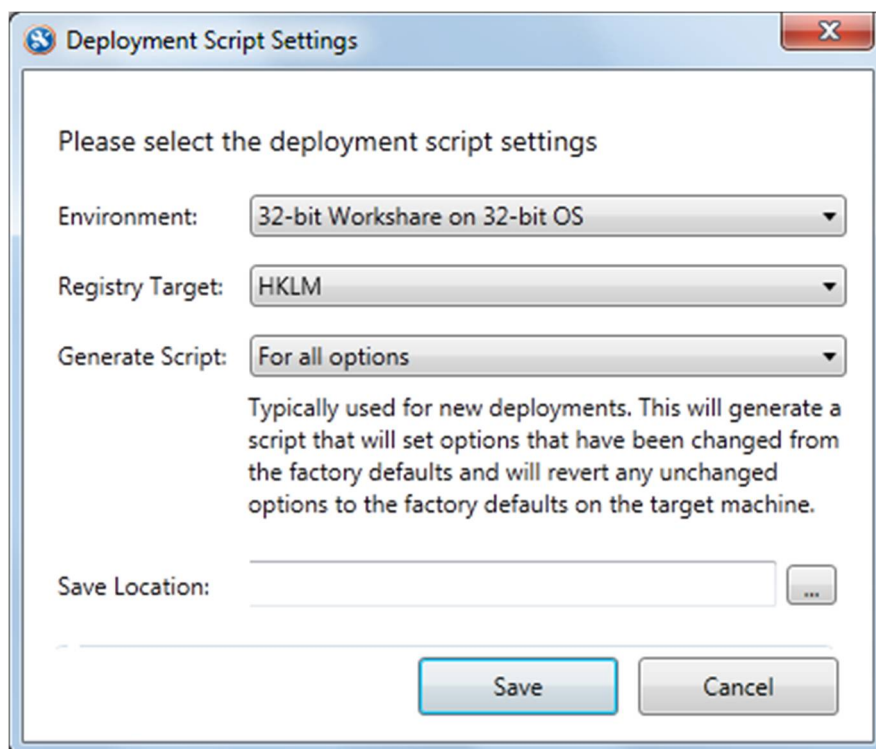
6. From the **Environment** dropdown list, select your environment.

7. From the **Registry Target** dropdown list, select where in the Registry you want to save the settings.

> *Note: Selecting HKCU will replace any personalized settings configured by an individual user on this machine.*

8. From the **Generate Script** dropdown list, select the type of file to generate. You can create a script:
   - **For all options**. The resulting ADM or REG file will contain all options. A REG file will set options that have been marked with the deployment icon and remove all other options by deleting them from the Registry. This will revert them to the factory default on the target machine. The ADM file will contain all the options and use the values defined by the Administrator as the default values. Typically this is used for new deployments – it will generate a script that will set options that have been changed from the factory defaults and revert any unchanged options to the factory defaults on the target machine.
   - **For options with a deployment icon**. The resulting ADM or REG file will only contain those options indicated by a green deployment icon. No other options will be deployed or changed. Typically this is used when upgrading an existing deployment – it will generate a script that will only set options that have been changed (indicated by the green arrow icon) and will not modify any unchanged options on the target machine.

9. In the **Save Location** field, click the browse button.
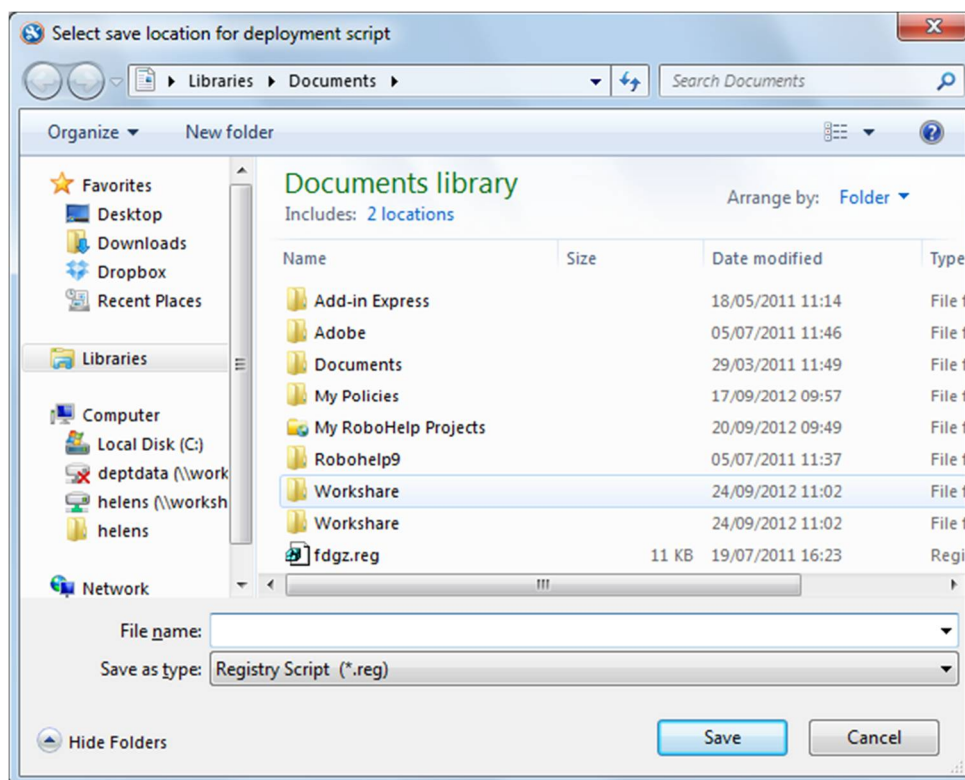
10. Name the file as required, navigate to the save location.

11. From the **Save as type** drop down list, select **ADM File** or **Registry Script** as the file type.

12. Click **Save**.

13. Click **Save** in the *Deployment Script Settings* dialog. The settings are saved to the specified ADM or REG file.

You can now deploy the REG file or use the ADM template to deploy settings to other individual Workshare workstations.

Loading Configuration Files

If you have saved the configuration settings as a Workshare Options (WSO) file, you can open the saved WSO file in the Workshare Configuration Manager. You can then update the settings on the Local Machine or continue developing a set of configuration parameters for future deployment. The save and re-load functionality enables you to keep a work-in-progress or project file.

To load a configuration file into the Workshare Configuration Manager:

- In Administrator Mode of the Workshare Configuration Manager, click the arrow on the **Load** button and select from the following:
  - **Load Workshare Options**: Enables you to browse to a WSO file.
  - **Load Defaults**: Resets all the parameters to their factory default settings.
  - **Load User Settings**: Resets all the parameters to the settings specified in the running user's HKEY_CURRENT_USER Registry hive.

> *Note: When you provide user credentials to the UAC prompt then that user is the running user.*

The selected settings are displayed in the Workshare Configuration Manager.

Upgrading to Workshare 8

By default, when you deploy Workshare to machines which have earlier versions of Workshare, all existing settings and options are transferred – whether they are user settings or public settings. If you don't want to migrate the existing options and settings to the Workshare 8 installation, you must deselect the following parameters in the **General** > **Administration** category of the Workshare Configuration Manager:

- **Backup and migrate the configuration for the Current Users**

- **Backup and migrate the default configuration for All Users**

You must then save and deploy the configuration before installing Workshare 8. The installation of Workshare Professional will then install with only the default.

Registry Configuration

This section describes configuration of Workshare that is done by making changes in the Registry.

> *Important: If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Only system administrators should attempt to make changes in the Registry.*

Convert Hyperlinks

When converting documents to PDF files, the Workshare PDF driver does not by default convert hyperlinks. Some PDF reader will convert hyperlinks within a PDF. If you want the Workshare PDF driver to convert hyperlinks when creating the PDF, you need to create the Registry value **PDFFileNameOptionsEx** in the Registry key SOFTWARE\Workshare\Options\8.00\Internal\PDF with a string value of **0x00140091**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user. Note that enabling this feature will impact performance and will slow down the PDF conversion process. If you want to turn the Convert Hyperlinks feature off, you should either remove this Registry value or change the Registry value to **0x00040091**.

Small Text Removal

When Workshare is configured to clean/delete small text (smaller than 5 points), it will check content for half sizes as well as full sizes (4.5, 4, 3.5, 3, 2.5, 2, 1.5, 1, 0.5) and this may slow down the cleaning process. If you want Workshare to just clean full point sizes (4, 3, 2, 1), you need to create the Registry value **HalfPointSmallTextSupport** in the Registry key SOFTWARE\Workshare\Options\8.00\Protect\ProtectAdmin with a string value of **true**. Use HKEY_LOCAL_MACHINE to set an option machine-wide and HKEY_CURRENT_USER to set an option for a user.

Chapter 4. Integration

This chapter describes how to integrate Workshare with your email systems, DMSs and the Workshare OCR Server. It includes the following sections:

- **Introduction**, below, introduces integrating Workshare with your email systems and DMSs.
- **Document Management Systems Integration**, page 43, describes how to integrate Workshare with your Autonomy iManage, Hummingbird or SharePoint DMS.
- **Email System Integration**, page 61, describes how to integrate Workshare with your email system.

Introduction

Document Management Systems

Workshare Professional 8 and Workshare Compare 8 have been tested and certified in a number of DMS 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) for any help.

> **Note**: Unless otherwise stated, all environments are the English version with the en-us language set.

DMS Integration:

> **Note:** Check with your DMS vendor about which Windows operating system supports your DMS.

- **NetDocuments**

  > **Note**: The NetDocuments integration requires that Microsoft Internet Explorer is installed (the NetDocuments login screen is displayed in an IE iframe) although it does not have to be the default browser.

- **Autonomy iManage:**
  - FileSite 8.5 SP3 Update 5
  - DeskSite 9.0 Update 4 (+ EMM)
  - DeskSite 8.5 SP3 Update 5
  - FileSite 9.0 Update 4 (+ EMM)
- **Open Text:**
  - eDOCS DM 5.3.0 COM only (Patch 5)
  - eDOCS DM 5.3.1 COM only (Patch 4)
  - eDOCS DM 5.3.1 COM only (Patch 5)
- **Worldox GX3**

  > **Note**: Workshare recommends WBGX Version ID: 6EB.688.D48 (Mar 28 2014) 11.0 or later.

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

Email Systems

Workshare is certified with the following email systems:

- Microsoft Outlook 2013 SP1 (32-bit)
- Microsoft Outlook 2013 (32-bit) + Japanese
- Microsoft Outlook 2010 SP2 (32-bit)
- Microsoft Outlook 2010 SP1 (32-bit) + Chinese Simplified & French
- Microsoft Outlook 2007 SP3 (32-bit)
- IBM Lotus Notes 8.5.3 FP4-FP6

Note: Interactive Protect and the Secure File Transfer feature of Workshare Protect is not supported in a Lotus Notes environment.

During installation, Workshare automatically detects your email system and configures itself to work with that system. If you work with both Lotus Notes and Microsoft Outlook, Workshare is configured to work with Lotus Notes.

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

Document Management Systems Integration

Autonomy iManage Integration – Configuring Server Integration

In order to use Workshare with an Autonomy iManage DMS, you must add the Workshare file types and the Workshare Compare application to the Autonomy iManage server so that the DMS can recognize and work with Workshare files. Additionally, it is necessary to add Workshare as an Autonomy iManage class.

Adding File Types to the Autonomy iManage Server

This step includes adding the Workshare Review file type (W3), the Workshare Compare file type (WDF), the Combine in Workshare file type (WWB) and, if it is not already added, the Microsoft Word file type (DOC) to the Autonomy iManage server.

Note: This must be done for all Autonomy iManage databases, regardless of whether the user has permissions to a database or not.

To add file types to the Autonomy iManage server:

1. In the Autonomy iManage Database Management window, expand the tree on the left underneath the database to be integrated with Workshare and select **Type**. A list of file types recognized by Autonomy iManage is displayed on the right side of the window.

2. From the *Manage* menu, select **Add**. The *Add Type* dialog is displayed.

3. Complete the fields as shown below and click **OK**.

Worshare Professional file type (W3): Workshare Compare file type (WDF):

Combine in Workshare file type (WWB)

4. Ensure that the Microsoft Word file type (DOC) appears in the list of recognized file types. If it does not, complete the above steps to add it.

Adding the Workshare Compare Application to the Autonomy iManage Server

This step includes specifying the location of the Workshare Compare executable file as well as identifying the file types used by Workshare Compare. This is done for each Autonomy iManage database that will be used with Workshare Compare.

To add the Workshare Compare application to the Autonomy iManage Server:

1. From the Start menu on the Autonomy iManage server, select **Programs** then **Autonomy iManage Server** and then **Database Administration**. The *Autonomy iManage Database Management* window is displayed.

2. Expand the tree on the left underneath the database to be integrated with Workshare and click **App Setup**. A list of applications set up to work with Autonomy iManage is displayed on the right side of the window.

3. From the *Manage* menu, select **Add**. The *Add App Setup Entry* dialog is displayed.

4. Complete the fields as shown below:

> **Note:** *Ensure the path points to the location of the Workshare Compare executable file. By default, this is* **C:\Program Files\Workshare\Modules\DeltaVw.exe**.

5. Click **OK**.

Adding Workshare Professional as a Class to Autonomy iManage Server

Adding Workshare files as a class (Compare class and Workshare Combine class) in the Autonomy iManage server enables you to classify Workshare documents accordingly. This is done for each Autonomy iManage database that will be used with Workshare.

If you do not want to add the Compare class to your Autonomy iManage server, you can specify your own class for the W3 file. The class that you specify must exist on your server. Refer to the procedure, *To specify your own class*, page 46.

To add Workshare as a class:

1. In the *Autonomy iManage Database Management* window, expand the tree on the left underneath the database to be integrated with Workshare and select **Class**. A list of file classes defined in Autonomy iManage is displayed on the right side of the window.

2. From the *Manage* menu, select **Add**. The *Add Class* dialog is displayed.

3. Complete the fields as shown below and click **OK**.

Compare class   Workshare Combine class

Note: Workshare will automatically create a profile for W3 files by copying profile values from the document the W3 file is for. Please make sure there are no mandatory fields (Required Fields) on a W3 profile because any such fields may not be mandatory (Required Fields) on a document profile.

To specify your own class:

Set the **Alternate Class Name** parameter in the Workshare Configuration Manager (**Integrations > Autonomy iManage** category). You set this parameter to specify the class that you want to use and enable it by selecting the **Use Alternate Class Name** parameter. The class MUST exist on your Autonomy iManage server.

Autonomy iManage Integration – Configuring Client Integration

There are several configuration procedures you may want to perform on an Autonomy iManage client when integrating with Workshare Professional, as follows:

- Hiding Workshare Professional (W3) files within Autonomy iManage, page 47.
- Launching applications within Autonomy iManage, page 48.
- Creating a Workshare Compare icon on the Autonomy iManage desktop, page 49.

Hiding Workshare Professional (W3) Files within Autonomy iManage

It is possible to hide the Workshare Professional (W3) files on your Autonomy iManage client machine by filtering out the files in the **COMPARE** class.

To hide the W3 file on an Autonomy iManage client machine:

1. In the *WorkSite* ribbon in Outlook, select **General Options**. The *Options* dialog is displayed.

2. Select the **Advanced** tab and click **Options**.
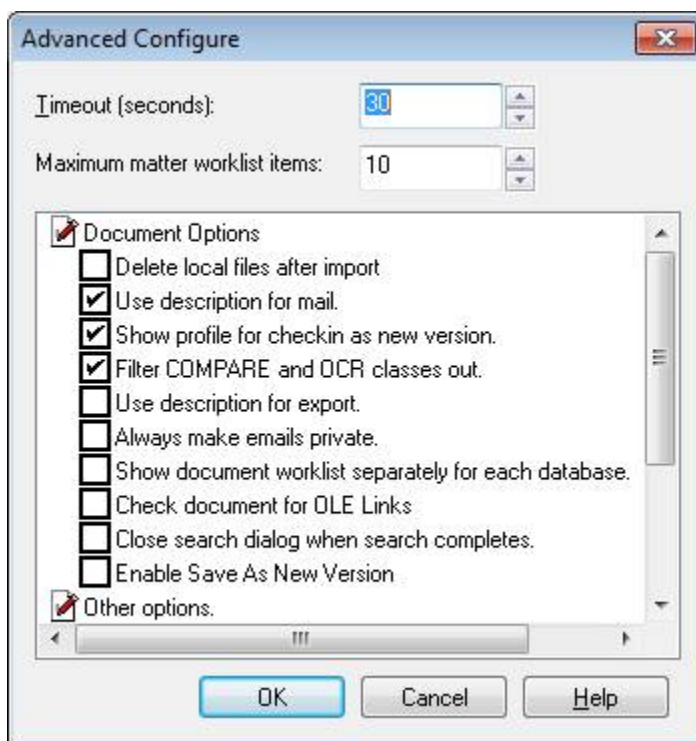
3. Select the **Filter COMPARE and OCR classes out** checkbox.

4. Click **OK.**

INTEGRATION

Launching Applications within Autonomy iManage

This procedure is only relevant when the Autonomy iManage server application location is different from your Local Application locations. Autonomy iManage would first use the local location of Workshare Compare before using the server location.

To launch Workshare Compare, Microsoft Word and Rich Text Format files from Autonomy iManage you have to add application information to Local Applications settings.

To add application information to Local Applications settings:

1. In the *WorkSite* ribbon in Outlook, select **Local Applications**. The *Application Setup Information* dialog is displayed.

2. Click the **Add** button. The *Add Local Application* dialog is displayed.

3. Complete the fields as shown below:

4. Click **OK** to save the changes.

Creating a Workshare Compare Icon on the Autonomy iManage Desktop

In order to launch Workshare Compare via an icon within your Autonomy iManage desktop, follow the procedure below.

To create a Workshare Compare icon:

1. Open Autonomy iManage.

2. Right-click the toolbar and select **Customize**. The *Customize* dialog is displayed.

3. Select the **Commands** tab.

4. Click and drag the **Workshare Compare** icon to the Autonomy iManage toolbar. The Workshare Compare icon now appears on the Autonomy iManage toolbar.
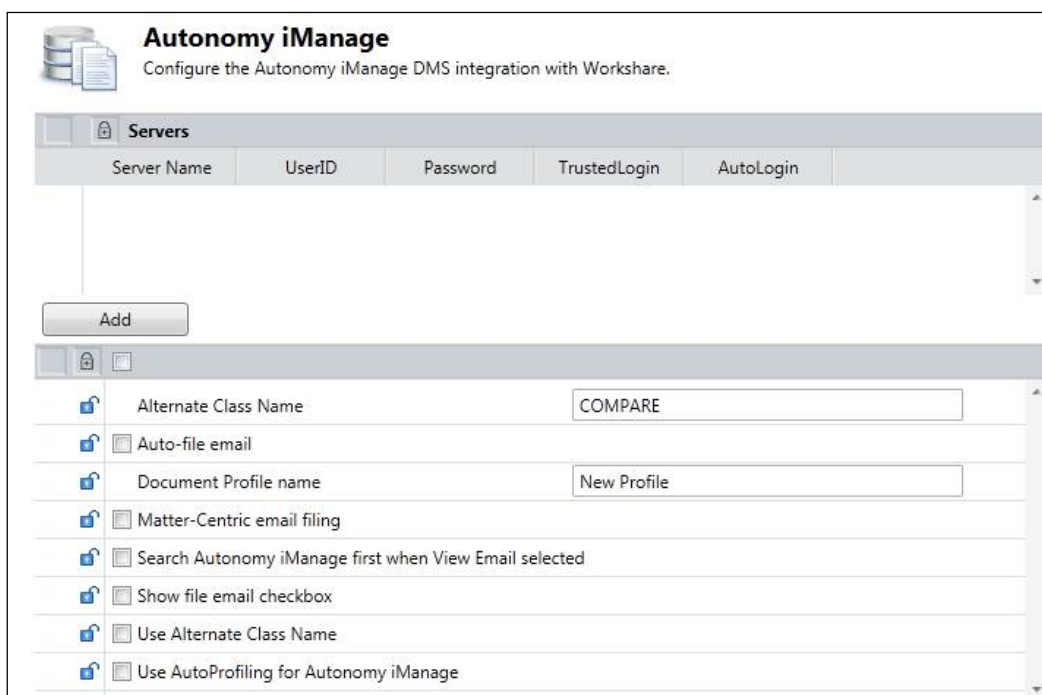
Autonomy iManage Integration - Configuring Workshare

On installation, Workshare automatically copies the Autonomy iManage server settings specified for the Autonomy iManage client. Workshare again retrieves the Autonomy iManage server settings at the beginning of each DMS session to keep the list of servers up to date.
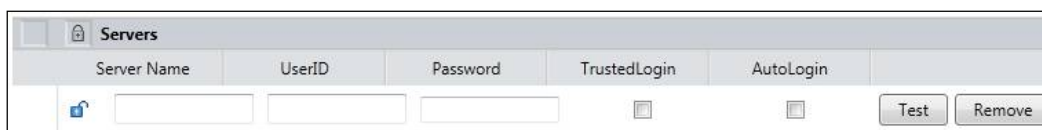
If you do not use Autonomy iManage trusted login (so that each user has a unique user name and password to access the Autonomy iManage server), you must specify your Autonomy iManage user name and password in the Workshare Configuration Manager.

To specify/modify Autonomy iManage server settings:

1. In Administrator Mode of the Workshare Configuration Manager, select the **Integrations > Autonomy iManage** category.

2. To add details of a new server, click **Add**. An entry is added to the list of Autonomy iManage servers in the **Servers** section.

3. In the **Server Name** field, enter the name of your Autonomy iManage server.

4. In the **UserID** and **Password** fields, enter the user login details that enable login to the specified server. If you connect to your Autonomy iManage server using your Windows account, select the **TrustedLogin** checkbox only.

5. Select the **AutoLogin** checkbox to automatically connect to the server and authenticate the user at startup. If you do not select this checkbox, the server can be registered but will not be authenticated at startup. This may be useful in a multi-server environment when you want to save the overhead of authenticating all the servers at startup.

> **Note:** *If a document ID is passed to a Workshare product for a document on a server for which it has details (a registered server) but to which it is not connected, then the Workshare product will automatically connect to that referenced server.*

6. Click **Test** to confirm connection to the specified server.

To delete a server from the list, click **Remove** to the right of the server details. To modify details of an existing server, edit the details in the **Servers** list.

Configuring Autonomy iManage 8 Email Filing Options

When working with an Autonomy iManage 8 DMS, Workshare can automatically file the email generated when sending a document for review in the appropriate Matter workspace. In order for this functionality to be available, the **Matter Centric email filing** parameter must be set in the Workshare Configuration Manager (**Integrations > Autonomy iManage** category). If this parameter is set, you can also select the **Auto-file email** parameter and the **Show file email checkbox** parameter (for Send for Review).

Hummingbird Integration – DM5

In order to use Workshare with a Hummingbird DMS, you must add the necessary Workshare file types and identify Workshare Compare as an application in the DMS server so that the DMS can recognize and work with Workshare files. Additionally, the Workshare Professional, Workshare Compare and the Microsoft Word applications must be made 'compatible' with the Hummingbird DMS.

> **Note:** The Hummingbird server integration procedures only need to be performed once per Hummingbird server. The procedures can be performed from the server or client machine.

Adding Application and File Types to the DM5 Server

This step includes adding the required file types used by Workshare - the Workshare Compare WDF file type and the Combine in Workshare WWB file type as well as specifying the location of the Workshare Compare executable file. The procedure described below is performed from the DM5 client machine.

To add application and file types to the DM5 server:

1. From the Start menu, select **Open Text > DM Server > Server Admin Tools > Library Maintenance**. The *Library Maintenance* window is displayed.

2. Click **Applications** and then click **New**. The *Application Maintenance* dialog is displayed.

3. Complete the fields as shown below:

> **Note:** For PDF Combine, enter **application/dcwin** as the **MIME Type**.

> *Note: To add the file type, click the browse button and click **Add** in the dialog displayed. Enter **WDF** or **WWB** in the **Extension** field and **Workshare Collaboration** or **Workshare Deltafile** or **Workshare Combine** in the **Description** field and click **OK** and then **OK** again.*

4. Click **OK**. The specified application now appears in the list of applications.

5. Double-click the new **DeltaView/Combine** entry to display the *Application Maintenance* dialog again.

6. Click the **Launch Methods** button. The *Application Launch Methods* dialog is displayed.

7. Click the **New** button. The *Application Launch Methods* dialog is displayed.
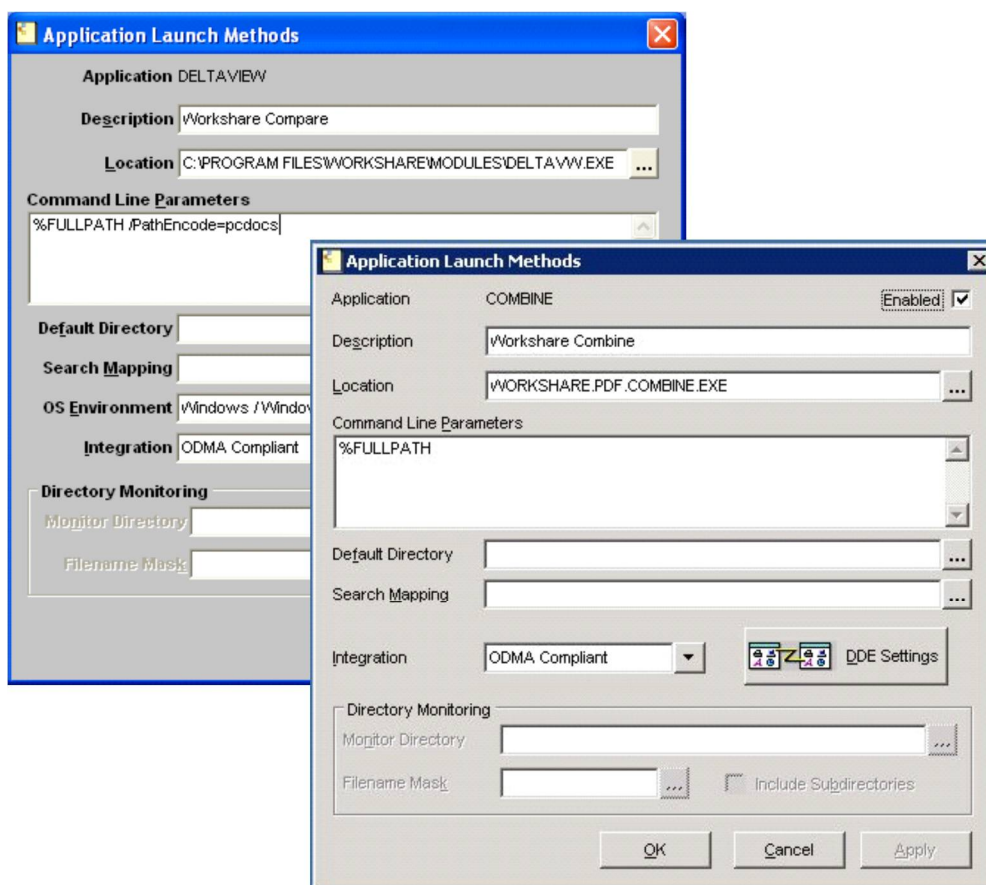
> *Note: If you already have Workshare DeltaView 2.9 or earlier configured, you should create a separate launch method for Workshare Compare.*

8. In the **Location** field, enter the location of the Workshare Compare/Combine executable file. By default, this is **C:\Program Files\Workshare\Modules\DeltaVw.exe** or **Workshare.Pdf.Combine.exe**.

9. In the **Command Line Parameters** field, %FULLPATH /PathEncode=powerDOCS.

> *Note: Do not forget to enter a space between FULLPATH and the forward slash.*

10. From the **Integration** dropdown list, select **ODMA Compliant**.

11. Ensure the **Enabled** checkbox (top right) is selected.

12. Click **OK**, and then **Close**.

Making Workshare Compatible with DM5

In order for files created in Workshare to be retrieved from DM5, Workshare, Microsoft Word and Workshare Compare must be made "compatible applications" with DM5.

To make Microsoft Word a compatible application:

1. In the *Library Maintenance* window, double-click **DeltaView**.

2. Click **Compatible Apps**. The *Compatible Applications* dialog is displayed.

3. From the **Non-Compatible Apps.** list, select **MS Word** and click **Add**. Microsoft Word is added to the **Compatible Apps.** list.
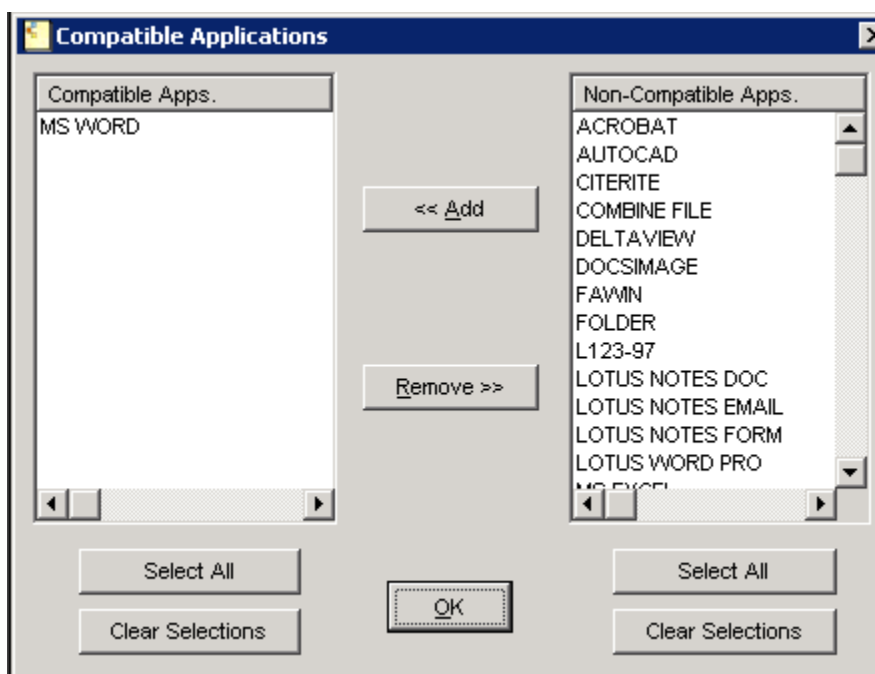
4. Click **OK**, and then **OK** again.

To make Workshare Compare a compatible application:

1. In the *Library Maintenance* window, double-click **MS Word**.

2. Click **Compatible Apps**. The *Compatible Applications* dialog is displayed.

3. From the **Non-Compatible Apps.** list, select **DeltaView** and click **Add**. Workshare Compare is added to the **Compatible Apps.** list.

4. Click **OK**, and then **OK** again.

Making the Workshare Compare Icon Appear on the Desktop and Within a User Profile

This section describes how to place the Workshare Compare icon on the DM5 desktop as well as within a user profile.

To add the Workshare Compare icon:

1. In the *Library Maintenance* window, double-click **DeltaView**.

2. Click **Options**. The *Application Options* dialog is displayed.
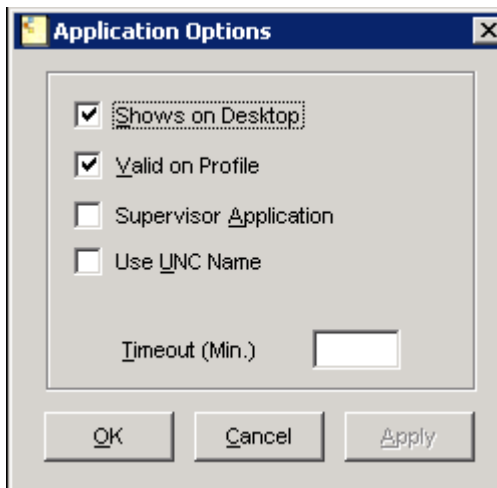
3. Select the **Shows on Desktop** and **Valid on Profile** checkboxes.

4. Click **Close**.

Worldox Integration – Configuring Compare Files

After installing Workshare Professional, you can configure the Worldox Compare Files option (available in the Worldox toolbar and the right-click menu) so that it works with Workshare.

To configure Compare Files in Worldox:

1. In Worldox, click **Compare Files** (in the toolbar or via the right-click menu).

2. Click **Properties** to the right of the **Compare using** field.

3. Click **Add**.
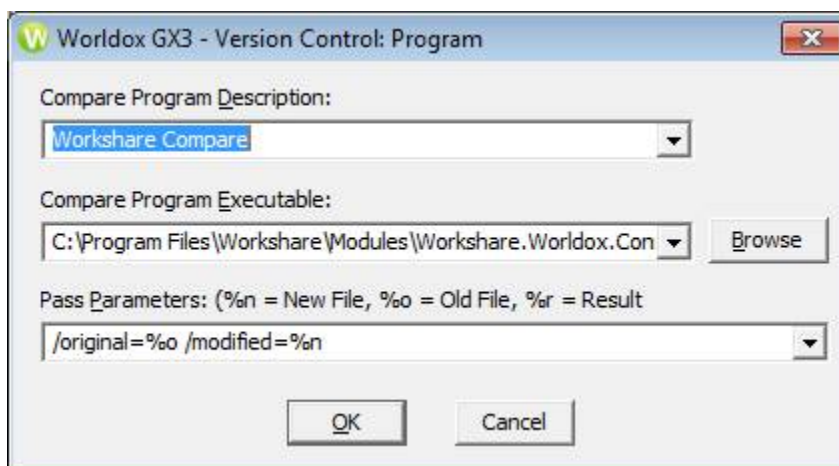
4. In the **Compare Program Description** field, enter a description such as "Workshare Compare".

5. Click **Browse** and browse to the Module folder in the Workshare installation folder.

6. Select Workshare.Worldox.Connector.exe and click **OK**.

7. In the **Pass Parameters** field, enter **/original=%o /modified=%n**.

8. Click **OK**.

9. Click **Close**.
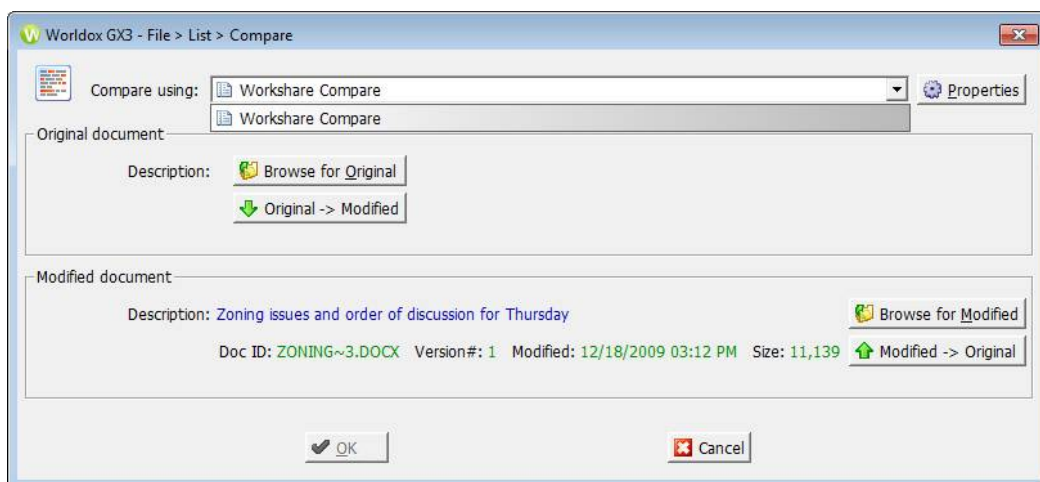
Now you can run a comparison using Workshare Compare.

Once you have completed this configuration, right-clicking a file in Worldox or selecting a file and clicking **Compare Files**, will display the above dialog with Workshare Compare selected as the application to use for the comparison.

SharePoint Integration - Server Installation

In order to use Workshare with SharePoint, the Workshare Professional Extension for SharePoint must be installed on Microsoft Windows Server 2008 (or later) running Microsoft Windows SharePoint Services 3.0 (or later).

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

To install Workshare Professional Extension for SharePoint:

1. Locate the installation package Workshare.Connect.SharePoint.WebService.x64/x86.msi and double-click to start the installation wizard. The installation welcome screen is displayed.

2. Click **Next**.
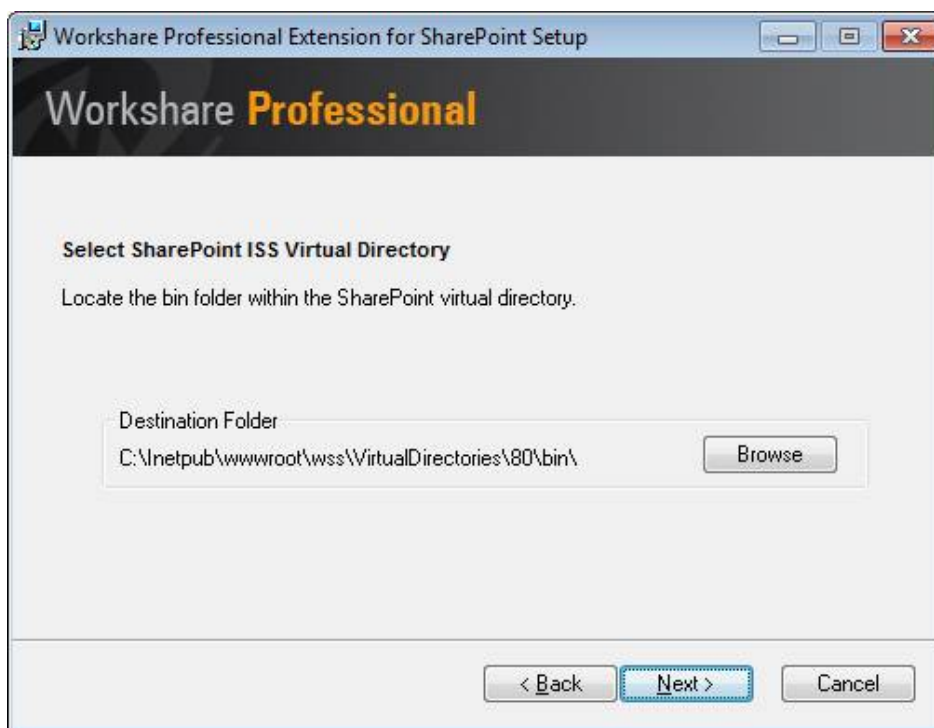
3. Select the **bin** folder in the SharePoint virtual directory where Workshare Professional Extension for SharePoint will be installed. By default this is located at C:\Inetpub\wwwroot\wss\VirtualDirectories\ 80\bin.

4. Click **Next**.
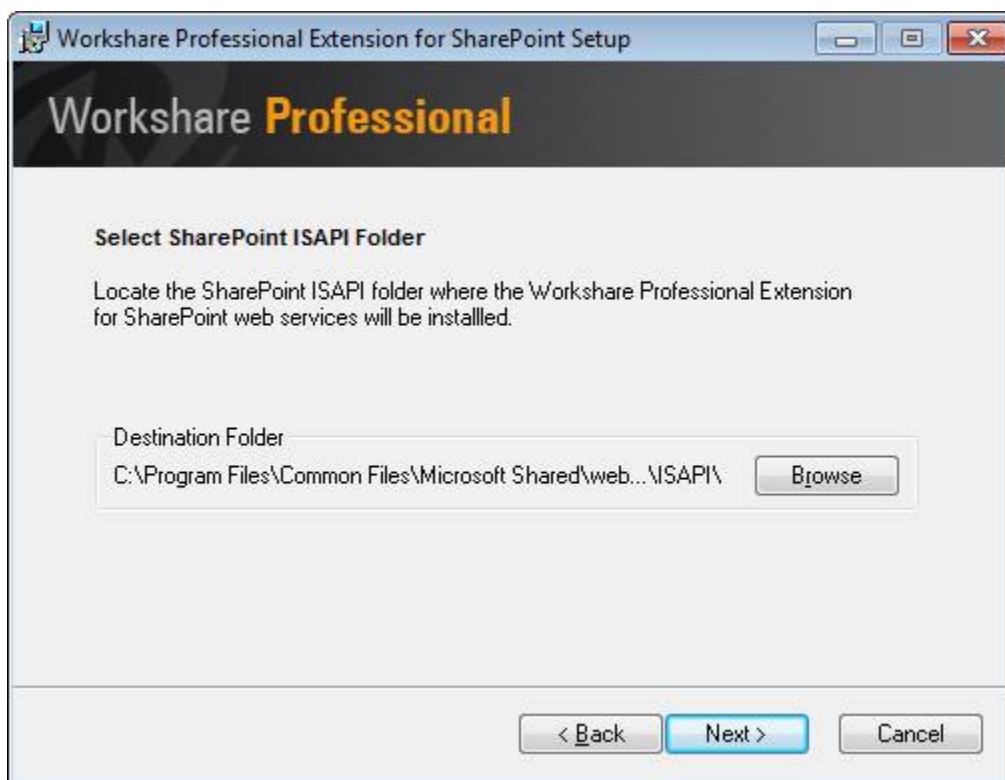
5. Select the SharePoint ISAPI directory where the Workshare Professional Extension for SharePoint web services will be installed. By default, this is located at C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\ISAPI\.

6. Click **Next**.
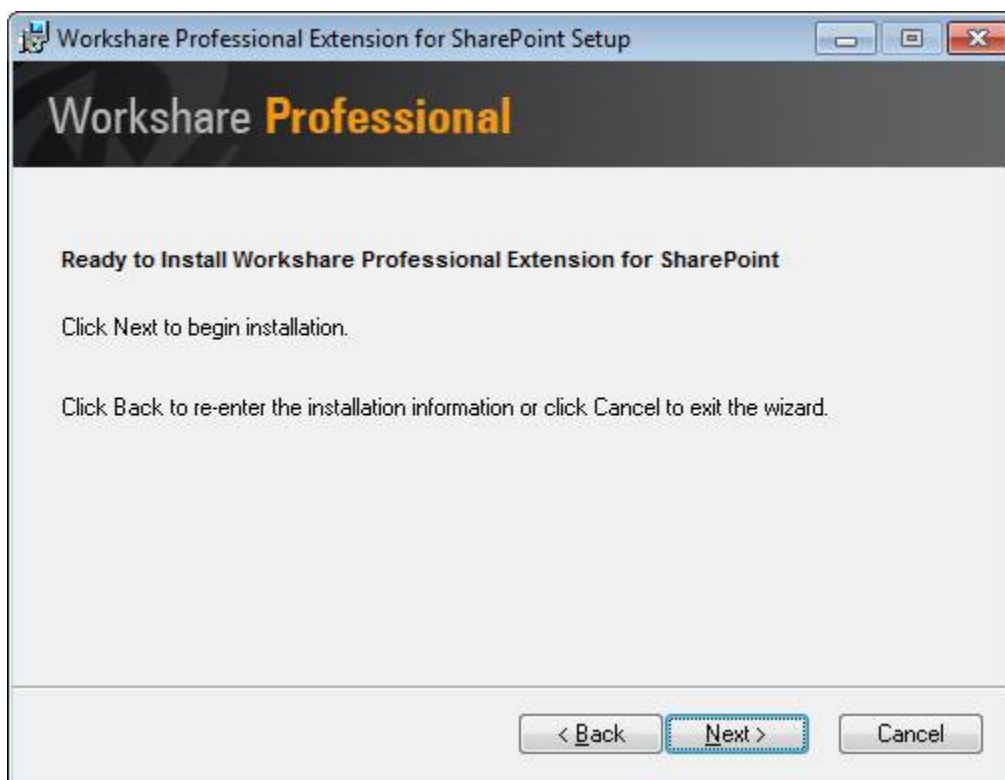
7. Click **Next** to begin installation or click **Back** button to change any installation settings.

8. Once the installation has completed, click **Finish**.

SharePoint Integration - Client Configuration

The SharePoint Integration for Workshare is provided as part of the Workshare installation package and requires a small amount of configuration on the client to specify SharePoint sites and servers that will be accessed from Workshare.

SharePoint Site Configuration

SharePoint sites need to be configured for both the Compare and the Send for Review functionality.

Compare

When comparing documents, users can select documents from a SharePoint site. The sites available for selection have to be configured in the Workshare Configuration Manager.

To configure SharePoint sites:

1. In Administrator Mode of the Workshare Configuration Manager, select the **Integrations > Microsoft SharePoint** category.

2. Click **Add**. An entry is added to the list of SharePoint sites in the **Servers** section.

3. In the text box, enter the complete URL for the SharePoint site location.

4. From the **Metadata Cleaning Policy** dropdown list, select how the site is to be considered for policy application purposes. If you select **Internal Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed internally. If you select **External Cleaning Policy**, documents at the specified SharePoint site will be treated similarly to documents emailed externally.

5. Click **Test** to confirm connection to the specified site.

To delete a site from the list, click **Remove** to the right of the site details. To modify details of an existing site, edit the details in the **Servers** list.

Send for Review

The SharePoint Integration for Workshare enables users to create document workspaces within a Windows SharePoint Portal Server site. When sending a document for review, users can save the document to a SharePoint site. Recipients receive an email specifying the SharePoint site where the document they are required to review is located. (Optionally, they can also receive a copy of the document as an attachment to the email.)

In the **Send Draft for Review** page of the Workshare Panel, users select the **Link to SharePoint** checkbox and then select a SharePoint site in the browser dialog displayed. The sites available for selection have to be configured in the Workshare Configuration Manager. Refer to the procedure on page 59.

The selected SharePoint site is displayed in the **Target Document Library** field.

When users click **Create Email**, and send the document for review, the recipient receives an email with a link to the SharePoint site where the document is saved. If the user has selected the **Include attachment(s) in email** checkbox then the email will also include the document as an attachment.

If necessary, users can be added to the selected SharePoint site by clicking the link **Manage users**.

LDAP Server Configuration

When users are adding members to a SharePoint workspace during the Send for Review process, they are able to utilize Microsoft Outlook's address book to choose members. Workshare will read Outlook's Exchange configuration and attempt to contact the LDAP server. In some circumstances, it may be necessary to override the automatic resolution, namely:

- The LDAP server port on Microsoft Exchange Server is on a different port (usually 389).

- Lotus Notes is being used as the email client.

- You wish to utilize another LDAP compatible directory service.

The **LDAP lookup server** parameter can be set in the Workshare Configuration Manager (**Integrations > Microsoft SharePoint** category). You may enter a server:port in the **LDAP Lookup Server** field. An example of this would be NY1LDAP1:390.

Email Systems Integration

Workshare uses the mail server address book to determine if recipients are internal or external, and applies particular settings as a result. Therefore if you want to use Workshare Protect to protect your documents while working offline, you need to ensure your machine is set up to enable recipients to be resolved correctly.

If a copy of your mail server address book is not available locally, all recipients are treated as external. The following sections describe how to create a local copy of your mail server address book in different email clients.

Setting Up Microsoft Outlook

For Workshare Protect to work correctly with Microsoft Outlook in offline mode, you simply need to enable offline mode (as specified in the Microsoft Outlook documentation), and ensure that you download the server address book.

To download the server address book:

1. From the *Tools* menu, select **Send/Receive** and then **Download Address Book**.

2. Select to download the address book.

3. Select to download full details.

4. Ensure the correct server address book is selected.

Setting Up IBM Lotus Notes

Resolving Email Addresses as Internal - Creating the Internal Domain List

Workshare categorizes the routing of email messages as either Internal or External to determine which policies to apply. Internal addresses are identified based on the recipient's domain. For Workshare to recognize the domain as internal, the internal domain list need to be populated with the value of the recipient's domain as it appears on the person's detail page in the Domino directory.

To set the internal domains:

The Internal Domain List can be set in the Workshare Configuration Manager (**Protection > Administration** category). If more than one domain is required then the values should be separated with a semicolon (;), for example, "Domain 1;Domain 2". The value is not case sensitive.

Offline Mode

For Workshare Protect to work correctly with Lotus Notes in offline mode, you need to set up the client to work offline (as specified in the Lotus Notes documentation), and set up the Mobile Directory Catalog on the Lotus Domino server. You must then replicate the Mobile Directory Catalog on the Lotus Notes client.

Setting Up the Mobile Directory Catalog on the Lotus Domino Server

This step involves creating the database (Mobile Directory Catalog), configuring the database and then loading the database.

To create the Mobile Directory Catalog:

1. From the *File* menu, select **Database** and then **New**.

2. Next to **Server**, select the Dircat server you picked to aggregate the directory catalog.

3. Next to **Title**, enter a title for the directory catalog (**Mobile Directory Catalog**).

4. Next to **Filename**, enter a file name for the catalog ('**MobileDC.nsf**').

5. Select **Create full text index for searching**.

6. Change **'Template Server…'** to **Domino server**.

7. Select **Show advanced templates**.

8. Below **Template server**, select a server that stores the Directory Catalog template, and then click **OK**.

9. Select the **Directory Catalog (DIRCAT5.NTF)** template.

10. Click **OK**.

To configure the Mobile Directory Catalog:

1. In the database you created (Mobile Directory Catalog), select **Create** and then **Configuration**.

2. Complete the following fields in the Directory Catalog Configuration document:
   - Change **Directories to include** to include the Domino Directories the Dircat task aggregates (Names.nsf).
   - Change **Additional fields to include** to include MailSystem.

3. Click **Save** and **Close**.

To load the Mobile Directory Catalog:

- From the Lotus Domino Server Administrator run the command **Load Dircat database** to build the condensed Directory Catalog (**Load DirCat MobileDC.nsf**).

Replicating the Mobile Directory Catalog on the Lotus Notes Client

This step involves replicating the Mobile Directory Catalog on the Lotus Notes client and setting up the client to use the Mobile Directory Catalog for name resolution.

To replicate the Mobile Directory Catalog:

1. From the *File* menu, select **Database** and then **Open**.

2. In the *Open Database* dialog, change the **Server** to the Domino server and the **Database** to Mobile Directory Catalog and click **Open**.

3. While the Mobile Directory Catalog database is open, from the *File* menu, select **Replication** and then **New Replica**.

4. Verify that the server is **Local** and the file name and title is for the Mobile Directory Catalog (**MobileDC.nsf**) and click **OK**.

To set up the client to use the Mobile Directory Catalog for name resolution:

1. From the *File* menu, select **Preferences** and then **User Preferences**.

2. Select **Mail and News**.

3. Modify the **Local Address Books** and add the Mobile Directory Catalog to the existing list (**names.nsf, MobileDC.nsf**).

4. Click **OK**.

> *Note: This step can only be completed if the Mobile Directory Catalog exists. See* Setting Up the Mobile Directory Catalog on the Lotus Domino Server*, page 63.*

Issues with Custom Forms (Recipient Fields)

If you work with custom forms and you modify recipients, you should be aware of which address fields Workshare Protect uses to resolve recipients as internal or external.

In order to determine the internal/external classification of a destination, only the following fields relating to recipients are extracted from the form by the EM_MAILSENDNOTE event:

- **EnterSendTo**
- **EnterCopyTo**
- **EnterBlindCopyTo**

If you use custom forms, you should note that the fields **Recipients**, **SendTo**, **CopyTo** and **BlindCopyTo** are not resolved.

Chapter 5. Network Deployment

This chapter describes how to install and license Workshare across your network. It includes the following sections:

- **Overview**, below, introduces the options available for installing Workshare across a network.

- **Deploying via the Command Line**, page 66, describes the steps required to use the command line to install and license Workshare across your network.

- **Citrix Installation Guidelines**, page 74, describes how to install Workshare on Citrix.

- **Active Directory Deployment Guidelines**, page 75, describes how to deploy Workshare using Active Directory.

Overview

Deploying Workshare across your network means installing and licensing Workshare on all workstations in your network. Workshare can be deployed across your network using the Workshare command line installation or third party deployment products.

It is recommended to deploy Workshare in a licensed state and to that end the following procedures describe how to set the LICFILE property. However, you could also license Workshare after installation. Refer to *Licensing Workshare*, page 26. Additionally, if you want to deploy specific configuration settings with Workshare, you must use a REG file or an ADM template. Refer to *Chapter 3: Configuration.* It is recommended to deploy the configuration settings prior to the Workshare installation.

The executables download prerequisites from the Internet if they are required. For enterprise deployments, the prerequisites have been bundled into a zip file (**WorksharePrereqsFor800.zip**). To skip downloading files from the Internet, the prerequisites can be extracted to the same location as the extracted files from the main installation files.

Installation File Summary

The installation requires the following prerequisites:

Prerequisite	Version	OS	Office	Notes
Microsoft .NET Framework 4.0	4.0.30319	Windows 7, Server 2008, Server 2008 R2	NA	
Microsoft Visual C++ 2010 SP1 Redistributable Package (x86)	10.0.40219	All (including x64 versions)	NA	
Microsoft Visual C++ 2010 SP1 Redistributable Package (x64)	10.0.40219	x64 OS versions	NA	The right-click handler is written in x64 code and requires this prerequisite.
KB935514 – Update for Office 2007	1.0.0	NA	Office 2007 pre SP1 only	

Prerequisite	Version	OS	Office	Notes
Microsoft Visual Studio 2010 Tools for Office Runtime Setup	10.0.40308	All	All	Visual Studio is NOT required.

> *Note: Microsoft .NET Framework should be installed first. The other prerequisite components can be installed in any order.*

For further information about each prerequisite, refer to *Appendix C: Workshare Prerequisites*.

The extracted files include the following Workshare MSI packages:

- Workshare Desktop [Workshare.Desktop.Dual.msi]

- Workshare Professional [Professional.msi]

- Workshare Compare [WorkshareCompare.msi]

- Workshare Protect [WorkshareProtect.msi]

The extracted files include the following Workshare files which can be used to install Workshare:

- Workshare.InstallWizard.exe

- Workshare.InstallWizard.ini

The Workshare.InstallWizard.exe uses the Workshare.InstallWizard.ini file which contains the information required to install Workshare correctly. In the INI file each package has a section which provides information about the executable such as display name, version number, installer path and installer command line arguments.

Workshare Professional/Compare/Protect is installed on a per machine basis. The Workshare.InstallWizard.exe installs Workshare Desktop on a per machine basis although Workshare Desktop can be installed on a per user basis (the msi default) or on a per machine basis.

Deploying via the Command Line

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

Configuring Modules During Installation

In a Workshare Professional installation, the Review and Audit, Compare, Protect and Secure File Transfer modules are installed by default and additionally, Microsoft Office integration is installed by default. During the command line install, you can customize the module selection by setting Registry values.

In a Workshare Compare installation, the Compare module is hard-coded into the installation and Microsoft Office integration is installed by default. During the command line install, you can customize the Office and DMS integration selection by setting Registry values. You cannot customize the Compare module selection.

In a Workshare Protect installation, the Protect module is hard-coded into the installation and the Secure File Transfer module and Microsoft Office integration are installed by default. During the command line install, you can customize the Office integration selection by setting Registry values. You cannot customize the Protect module selection.

Registry

The Registry location HKEY_LOCAL_MACHINE\SOFTWARE\Workshare\Install contains DWORD values which can define the module state.

Module	Registry Value	DWORD Value	Available In
Autonomy iManage	ProfInterwovenModule	1	Professional & Compare
Compare	ProfCompareModule	1	Professional
Hummingbird	ProfHummingbirdModule	1	Professional & Compare
Microsoft Excel Integration	OfficeExcelIntegration	1	Professional, Compare & Protect
Microsoft Outlook Integration	OfficeOutlookIntegration	1	Professional, Compare & Protect
Microsoft PowerPoint Integration	OfficePowerPointIntegration	1	Professional, Compare & Protect
Microsoft Word Integration	OfficeWordIntegration	1	Professional, Compare & Protect
NetDocuments	ProfNetDocumentsModule	1	Professional & Compare
Worldox	ProfWorldoxModule	1	Professional & Compare
Protect	ProfProtectModule	1	Professional
Review and Audit	ProfReviewModule	1	Professional
Secure File Transfer	ProfSecureFileTransferModule	1	Professional & Protect
SharePoint	ProfSharepointModule	1	Professional & Compare

For instance, the following example Workshare Professional Registry script would enable Compare and Protect and Secure File Transfer and NetDocuments and disable Review and Audit, SharePoint, Hummingbird, Autonomy iManage and Worldox:

```
Windows Registry Editor Version 5.00


[HKEY_LOCAL_MACHINE\SOFTWARE\Workshare\Install]

"ProfReviewModule"=dword:00000000

"ProfCompareModule"=dword:00000001

"ProfProtectModule"=dword:00000001

"ProfSecureFileTransferModule"=dword:00000001

"ProfHummingbirdModule"=dword:00000000

"ProfInterwovenModule"=dword:00000000

"ProfSharepointModule"=dword:00000000

"ProfNetDocumentsModule"=dword:00000001

"ProfWorldoxModule"=dword:00000000
```

Information in a Registry script can be imported into the Registry using regedit.exe. Assuming that the above Registry script is in WorkshareModuleState.reg, you could import it into the Registry silently by:

```
Regedit /s <path to shared directory>\WorkshareModuleState.reg
```

DisableFeatures.ini

The DisabledFeatures.ini file is no longer supported for installations of Workshare.

In previous versions of Workshare, the module state could be controlled with an INI file called **DisabledFeatures.ini** in the installation directory. This INI file has no effect on the installation.

Installation Procedure with the Install Wizard

The Workshare install contains the Workshare Install Wizard and Workshare installs. Some of the prerequisites are contained in the install. The Workshare Install Wizard examines the client desktop, downloads any prerequisites not present, installs the prerequisites and installs and configures the Workshare installs.

Deploying Workshare with the Self-Extracting Executable

The following procedure describes how to install Workshare using the self-extracting executable.

To install Workshare using the self-extracting executable:

1. Create a shared directory with relevant permissions so that client machines can access the Workshare executable during the installation.

2. Copy the self-extracting executable to the shared directory.

3. The default module state is to install the Compare, Protect, Review and Audit and Secure File Transfer modules. You can change the installed module state by running a Registry script on the client to set the required module install state before installing the executable.

4. Run the executable on the client desktop. This will extract the files to the client and run the Install Wizard on the client machine. Parameters passed to the self-extracting executable are passed on to the Install Wizard. The command line is:

```
<path to ProfessionalInstall-100.XXX.exe> [-autorun] [-silent] [-
acceptDownload]
```

You must add '-acceptDownload' to the command line if you are installing silently and there are prerequisites that need to be downloaded from the Internet. To skip downloading the prerequisites from the Internet, follow the instructions in the next section.

Deploying Workshare using Extracted Contents of the Executable

The following procedure describes how to install Workshare using the contents of the self-extracting executable. Extracting the contents enables customization of the install and allows the administrator to skip downloading the prerequisites by providing the prerequisites directly.

To install Workshare using the extracted contents of the executable:

1. Create a shared directory with relevant permissions so that client machines can access the Workshare installation files during the installation.

2. Extract the contents of the Workshare executable to the directory created in step 1.

3. (Optional) Extract the contents of **WorksharePrereqsFor800.zip** to the directory created in step 1.

4. The default module state is to install the Compare, Protect, Review and Audit and Secure File Transfer modules. You can change the installed module state by running a Registry script on the client to set the requested module install state before installing the executable.

5. Run the Install Wizard on the client desktop with the appropriate options. You must specify '-acceptDownload' if you have specified '-silent', you have NOT followed step 3 and prerequisites are required by the client desktop. The Install Wizard command line can be:

```
<path to Workshare.InstallWizard.exe> [-autorun] [-silent] [-acceptDownload]
```

Examples

If you want an install where the user must click through the Wizard screens, an example command would be as follows:

```
<path to Workshare.InstallWizard.exe>
```

If you want an install where the progress is displayed to the user but they do not have to click through the Wizard screens, an example command would be as follows:

```
<path to Workshare.InstallWizard.exe> –autorun -acceptDownload
```

If you want an install where the progress is not displayed to the user, an example command would be as follows:

```
<path to Workshare.InstallWizard.exe> -silent -acceptDownload
```

Installation Procedure using the MSI Files Directly

To install Workshare using the MSI files you must extract the contents of the Workshare executable and ensure that all prerequisites are installed on the client desktop.

Installation Procedure without Install Wizard

For each file that you need to install you must retrieve the following information from the appropriate section in the Workshare.InstallWizard.ini file:

- InstallerPath
- InstallerArgs

For executables you must specify the full path to the location of the executable in InstallerPath followed by the InstallerArgs. In general this will install the executable quietly.

For MSIs you must specify msiexec.exe /i [InstallerPath] [InstallerArgs].

To deploy Workshare without the Install Wizard using the command line:

1. Create a shared directory with relevant permissions so that client machines can access the Workshare installation files during the installation.

2. Extract the contents of the Workshare executable to the shared directory created in step 1.

3. The default module state is to install the Compare, Protect, Review and Audit and Secure File Transfer modules. You can change the installed module state by running a Registry script on the client to set the requested module install state before installing the executable. Alternatively, you can specify modules to install to the Professional MSI in step 5.

4. Install prerequisites, as listed on page 65.

5. Install the product msi (Professional.msi, WorkshareCompare.msi, WorkshareProtect.msi).

6. Install the Desktop Client msi (Workshare.Desktop.Dual.msi).

In order to deploy Workshare in a licensed state, the property LICFILE is set in the install string. In order to deploy Workshare with specific configuration settings, you must use a REG file or an ADM template. Refer to *Deploying Configuration Settings*.

> *Note: The Workshare MSIs must be installed in the order specified above.*

First Example Installation

The following example will install Workshare Professional for the first time with the Compare, Review and Audit, Protect and Secure File Transfer modules enabled on an x64 system that requires .NET 4 Framework quietly. This is done from the command line, from within a DOS window or using a batch (.bat) file and should only be attempted by the network administrator or other qualified personnel. It assumes that the files have been extracted to a shared directory.

To install Workshare:

1. Enter the following command to install the .NET 4 Framework quietly:

```
<path to shared directory>dotNetFx40_Full_x86_x64.exe /q:u /c:"install
/q /l"
```

2. Enter the following command to install the Professional Client quietly:

```
msiexec.exe /i <path to shared directory>\Professional.msi REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 SKIP_UPGRADE_WARNING=1 <property1>
<property2> <property…> /qn
```

3. Enter the following command to install Workshare Desktop quietly:

```
msiexec.exe /i <path to shared directory>\Workshare.Desktop.Dual.msi
MSIINSTALLPERUSER= ALLUSERS=2 ENABLEUPDATES=0 /qn
```

> *Note: If you want to turn logging on during the install, add **/l*v <path and name of log file>** before **/qn**. This generates a Windows Installer verbose (descriptive) log file which can be useful should you need to contact Workshare Customer Support.*

As an alternative to installing quietly (/qn) use **/qn+** to perform a silent install with final notification.

Refer to *Appendix A: Additional Msiexec.exe Parameters and Switches*, for additional parameters and switches that can be passed to the msiexec.exe.

Second Example Installation

The following example will silently install Workshare Professional for the first time with the Compare module only enabled on a system which has all prerequisites installed. This is done from the command line, from within a DOS window or using a batch (.bat) file and should only be attempted by the network administrator or other qualified personnel.

To install Workshare:

Enter the following command to install the Professional Client quietly:

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

> **Note:** *If you want to turn logging on during the install, add /l*v <path and name of log file> before /qn. This generates a Windows Installer verbose (descriptive) log file which can be useful should you need to contact Workshare Technical Support.*

Refer to *Appendix A: Additional Msiexec.exe Parameters and Switches*, for additional parameters and switches that can be passed to the msiexec.exe.

Compulsory Properties– Professional/Compare/Protect

The following table shows the compulsory properties that must be specified for installation of Professional/Compare/Protect.

Property	Value
REINSTALL	Ensures that upgrades install correctly. The required value is **ALL**.
REINSTALLMODE	Sets the reinstall mode for upgrades. The default value is **vomus**. This ensures that the latest versions of the MSI packages are cached and older files are overwritten.
ALLUSERS	Installs the application per machine. The required value is **1**.
INSTALLDIR	Specifies the installation folder for Workshare. The default value is **<ProgramFilesFolder>\ Workshare\Modules**.
SKIP_UPGRADE _WARNING	Disables the display of the upgrade warnings when installing Workshare. Required for silent installations. The required value is **1.**

Optional Properties – Professional/Compare/Protect

The following table shows the optional properties that can be specified to the Workshare install (Professional/Compare/Protect).

Property	Value
LOGFILE	Name and location of the WCA log file. For example, **LOGFILE="C:WorkshareConfig.log"**. The log file can either be stored at a shared location or stored locally on the workstation. If a location is not specified for the log file it will be written to the local TEMP folder. By default the log file is named **WorkshareConfig.log**. The WCA log file will provide details of all the steps the WCA has taken and can be passed to Workshare if any difficulties are encountered. The log file is appended to, not overwritten, in order to retain all logged information. Therefore the latest details will be at the end of the log file.
LICFILE	Name and location of the license file. For example, **LICFILE="\\server\share\Workshare.lic"**. The specified LIC file will be copied to the **Modules** folder of the Workshare installation directory. *Note: The most recent license file will be used by Workshare.*
NOTESINIFILE_PATH	Location of the notes.ini file. This should be specified in non-standard IBM Lotus Notes environments to ensure that Workshare components are added correctly to the INI file by the install.
INSTALL_COMPARE	Turns Compare module on. To enable installation of the Compare module, set **INSTALL_COMPARE=1**.
INSTALL_DVSHORTCUT	Installs the Workshare Compare shortcut on the desktop. The shortcut is created by default. To prevent the creation of the shortcut set **INSTALL_DVSHORTCUT=0**
INSTALL_HUMMINGBIRD	Turns Hummingbird module on. To enable installation of the Hummingbird module, set **INSTALL_HUMMINGBIRD=1**.
INSTALL_INTERWOVEN	Turns Autonomy iManage module on. To enable installation of the Autonomy iManage module, set **INSTALL_INTERWOVEN=1**.
INSTALL_PROTECT	Turns Protect module on. To enable installation of the Protect module, set **INSTALL_PROTECT=1**.
INSTALL_REVIEW	Turns Review and Audit module on. To enable installation of the Review and Audit module, set **INSTALL_REVIEW=1**.
INSTALL_SECUREFILETRANSFER	Turns Secure File Transfer module on. To enable installation of the Secure File Transfer module, set **INSTALL_SECUREFILETRANSFER=1**.
INSTALL_SHAREPOINT	Turns SharePoint module on. To enable installation of the SharePoint module, set **INSTALL_SHAREPOINT=1**.
INSTALL_NETDOCUMENTS	Turns NetDocuments module on. To enable installation of the NetDocuments module, set **INSTALL_NETDOCUMENTS=1**.
INSTALL_WORLDOX	Turns Worldox module on. To enable installation of the Worldox module, set **INSTALL_WORLDOX=1**.

Property	Value
INSTALL_EXCEL_ INTEGRATION	Integrates Workshare into Microsoft Excel. To enable installation of the Microsoft Excel integration, set **INSTALL_EXCEL_INTEGRATION=1**.
INSTALL_OUTLOOK_ INTEGRATION	Integrates Workshare into Microsoft Outlook. To enable installation of the Microsoft Outlook integration, set **INSTALL_OUTLOOK_INTEGRATION=1**.
INSTALL_POWERPOINT_ INTEGRATION	Integrates Workshare into Microsoft PowerPoint. To enable installation of the Microsoft PowerPoint integration, set **INSTALL_POWERPOINT_ INTEGRATION=1**.
INSTALL_WORD_ INTEGRATION	Integrates Workshare into Microsoft Word. To enable installation of the Microsoft Word integration, set **INSTALL_WORD_INTEGRATION=1**.

If none of the Compare, Review and Audit or Protect module properties is specified, the Compare, Review and Audit and Protect modules will be installed. If any of the Compare, Review and Audit or Protect module property are specified, then unspecified modules are not installed.

If none of the Microsoft Office integrations is specified, then all integrations are installed and Workshare will integrate with Microsoft Word, PowerPoint, Excel and Outlook. If one of the Microsoft Office integrations is specified, then the others are assumed to be "off" unless specifically specified as "on".

Optional Properties – Desktop Client

The following table shows the optional properties that can be specified to the Workshare Desktop Client install.

Property	Value
ALLUSERS	Allows the user to specify a per user or per machine install via MSIINSTALLPERUSER when the value is 2. The default value for the Desktop Client is 2. Please see http://msdn.microsoft.com/en-us/library/windows/desktop/aa367559(v=vs.85).aspx
ENABLE_UPDATES	If this property is not specified then the Desktop Client checks for updates. If you would like to disable update checks then set ENABLE_UPDATES=0.
MSIINSTALLPERUSER	Allows the user to specify a per user or per machine install. If this property is not specified then the Desktop Client is installed on a per user basis. Please see http://msdn.microsoft.com/en-us/library/windows/desktop/dd408007(v=vs.85).aspx

Example Workshare Install Command Line

An example of a Workshare Professional installation command line is as follows:

```
msiexec.exe /i "\\InstallMachine\Workshare\Professional.msi" REINSTALL=ALL
REINSTALLMODE=vomus ALLUSERS=1 LOGFILE="\\InstallMachine\Workshare\
Workshare.log LICFILE="\\InstallMachine\Workshare\Workshare.lic"
```

> **Note:** *Properties and values are all case sensitive.*
> *The use of " " should be used where there is character spacing in file paths.*

Citrix Installation Guidelines

Workshare can be installed on a Citrix server using the standard installation process. To restrict the number of users who have access to Workshare, you are required to manually modify the Registry keys.

> *Note: Workshare is configured to install on a per machine basis and not a per user basis.*

To install Workshare on the Citrix server:

1. Ensure the Terminal Server is in Install mode.

2. Install Workshare on the Citrix server using the standard installation process. It is recommended that the default folder structure: "Program Files/Workshare/Modules" is retained. Refer to Chapter 2: Installation, page 21, for more information.

3. Remove any shortcuts from the desktop if they were created.

The above steps will install Workshare for all users of the Terminal Server. To customize access to Workshare functionality, use the following approach:

Enable Specific Users: Remove Workshare integration from all Microsoft Office applications and then use a logon script deployed to specific users (using Active Directory) to reconfigure the Workshare integration when needed/necessary.

> *Note: When the installation remains a per machine install, all users using the Citrix server where Workshare is installed will get Workshare. This may not be required and it will increase the load on the server.*

Enable Specific Users

These steps are best performed immediately after installation of Workshare Professional/Compare/Protect.

To disable Workshare for all Microsoft Office users:

1. Remove All Users/Current User Registry settings as follows: Execute CitrixProfessionalDisableLocalMachine.reg/CitrixProfessionalDisableUser.reg.

2. Manually remove Workshare For Review.lnk (if Workshare review is enabled) and Workshare Batch Clean.lnk (if Workshare Protect is enabled) from All Users/Current User [SendTo] folder, so that the corresponding context menu items in right click > Send to are removed.

To enable Workshare Professional for individual Microsoft Office users:

1. Enable Current User Registry settings as follows: Execute CitrixProfessionalEnableUser.reg.

2. If you have Workshare Protect enabled, run Workshare.Protect.UserInit.exe to bring back Workshare Batch Clean.lnk.

> *Note: No additional step to be done for Workshare For Review.lnk as it is dynamically generated.*

Active Directory Deployment Guidelines

When working with Windows 2008 Server (or later), you can deploy Workshare across your network using Active Directory. "Assigned to machine" installation is the preferred method of distributing Workshare Professional via Active Directory and is described in *Deploying Workshare Professional/Compare/Protect*, page 76. Workshare Desktop can be distributed on a "per user" or "per machine" basis and this is described in *Deploying Workshare Desktop*, page 82.

The "assigned to user" and "published to user" methods are outlined below.

Assigned/Published to User Methods

In general, it is not recommended to deploy Workshare Professional/Compare/Protect using the assigned to user or published to user methods. These methods do not complement the way Workshare works for the following reasons:

- If all previous installations of Workshare were assigned to machine installs, a subsequent assigned/published to user install will not remove previous versions of Workshare.

- The Workshare application is not designed to support user isolation for either assigned or published to user in Active Directory deployment. Whilst Workshare will operate normally for the user for which it is installed, it will also be partially visible to other users - other users on the machine will see the Workshare menu but will not be able to use it. If an application has been assigned or published to a user, another user should not be able to see it or operate it at all.

> *Note: With Workshare, another user has the Workshare menu and button (not the Workshare Panel) in Microsoft Word but when a menu option or the button is clicked, the error: **"WinWord.exe Unable to perform request: Unexpected exception"** is displayed.*

Workshare Desktop can be deployed using the assigned to user, published to user or assigned to machine methods.

The published to user method does not install the software but it installs 'entry points' so that it looks to the user like the software is installed. However, the software is not installed until it is used - when an 'entry point' is activated, the software is installed. An 'entry point' can be things like a desktop shortcut, a start menu shortcut, a file extension or a template.

For example, if publishing Adobe Acrobat to a user, the following would happen:

- Shortcuts are placed wherever Adobe Acrobat has assigned its shortcuts (such as the desktop and start menu).

- File extension associations for PDF are linked to Adobe Acrobat.

- The software will then install if the user either attempts to click on one of the shortcuts or attempts to open a .PDF.

The published to user method uses a technology called JIT (just-in-time). This enables an administrator to deploy the software to every user (for example) and the software will only be actually installed to the users that require it. This saves on bandwidth, licensing and workstation disk space.

With Workshare Professional/Compare/Protect, there are no valid entry points.

- There are no shortcuts that users click on to launch Workshare (it is opened via Microsoft Word).

- Workshare does not have a file extension other than W3 files but users will not be opening these files.

The only feature that will work with published to user is the "add new software" entry under add/remove programs.
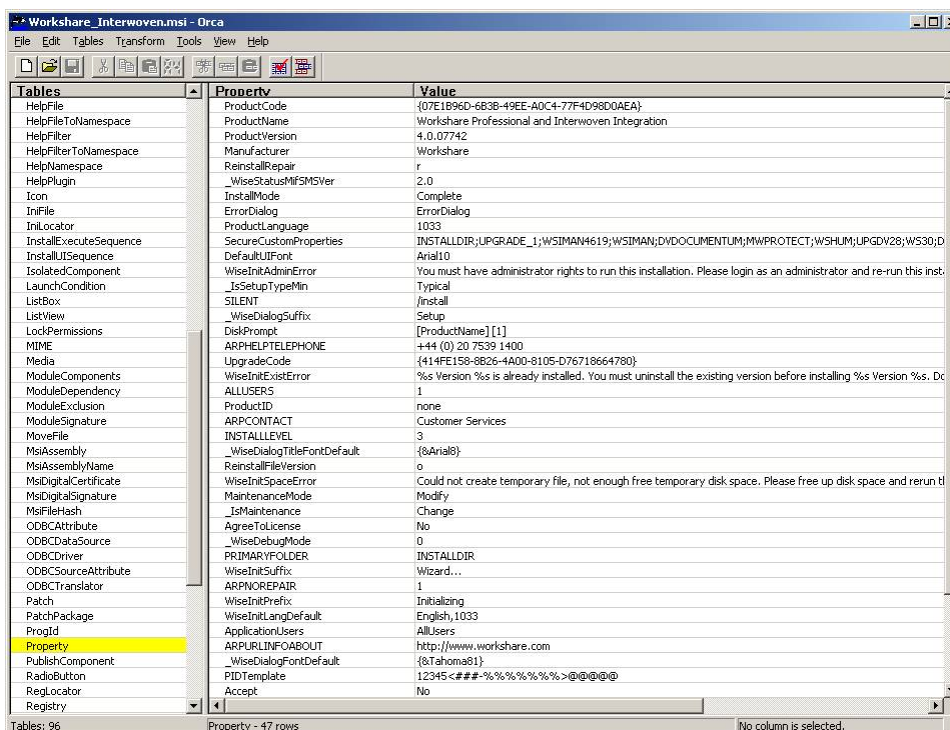
Deploying Workshare Professional/Compare/Protect

Note: Before installing using this method, please refer to the section, Deploying via the Command Line, page 66.

In order to deploy Workshare in a licensed state, the property LICFILE is set via a Windows Installer transform file (*.mst). This step is included in the following procedure. Additionally, if you want to deploy specific configuration settings with Workshare, you must use a REG file or an ADM template. Refer to *Chapter 3: Configuration.*

The following procedure must be completed for each of the installation components of Workshare - Professional.msi/WorkshareCompare.msi/WorkshareProtect.msi. The following example illustrates how to create the Professional.msi Active Directory group policy.

To deploy Workshare Professional using Active Directory:

1. On the Windows Server machine, create a shared folder with relevant permissions so that client machines can access the Workshare MSI during the automatic installation.

2. Extract the MSI file from the EXE install file and copy it into the folder created in step 1.

3. Create a transform (MST) file. The transform file is used to specify properties, such as LICFILE, INSTALLDIR, during the installation. The following procedure describes how to create a transform file using the Orca utility provided in the Windows Installer Software Developers Kit.

4. Launch Orca.

5. Open the Professional.msi file.

6. From the *Transform* menu, select **New Transform**. In the title bar of the window, **transformed by Untitled** is displayed in parenthesis the name of the msi.

7. In the left pane, select the **Property** table.

8. Right-click in the right pane and select **Add Row**.

9. Select **Property** in the upper area and enter **LICFILE** in the lower area.

10. Select **Value** in the upper area and enter the path to the license file (Workshare.lic) in the lower area. You are advised to specify this property otherwise Workshare Professional will be deployed in an unlicensed state and you will have to license it manually.

> *Note: The license file is provided by Workshare Ltd.*

11. Click **OK**.

12. Repeat steps 8 to 11 for additional properties as required. You can add any of the properties specified on page 72.

13. From the *Transform* menu, select **Generate Transform** and the save the transform file to the shared folder created in step 1.

14. From the Start menu, launch **Active Directory Users and Computers**. A list of organizational units is displayed on the left side.
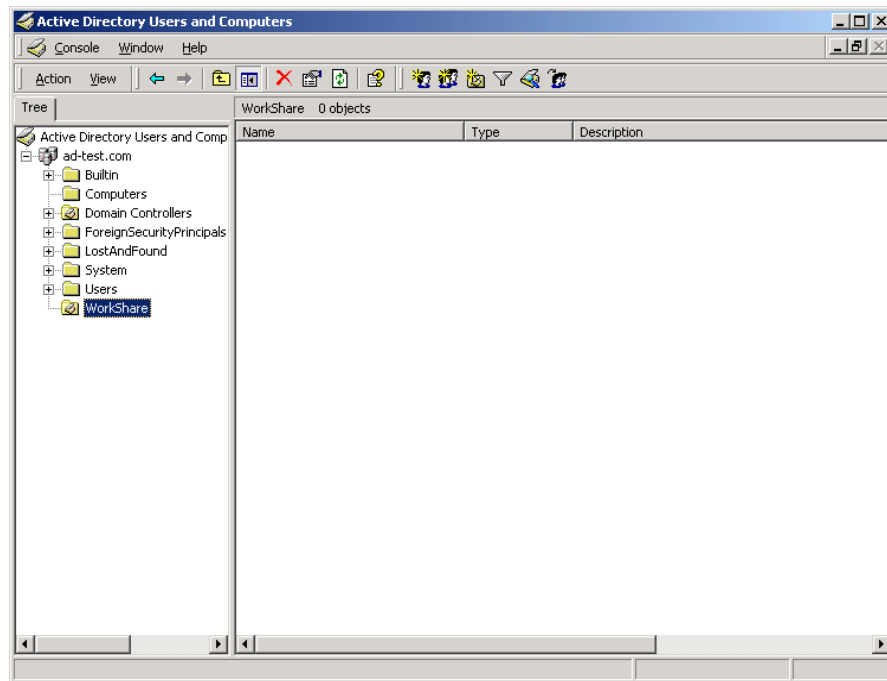
15. You now have to configure a group policy for the users to which you will deploy Workshare Professional. This is done for each organizational unit that includes users to which you want to deploy.

16. Right-click an organizational unit and select **Properties**.

17. In the **Group Policy** tab, click the **New** button and enter a name for the new policy.
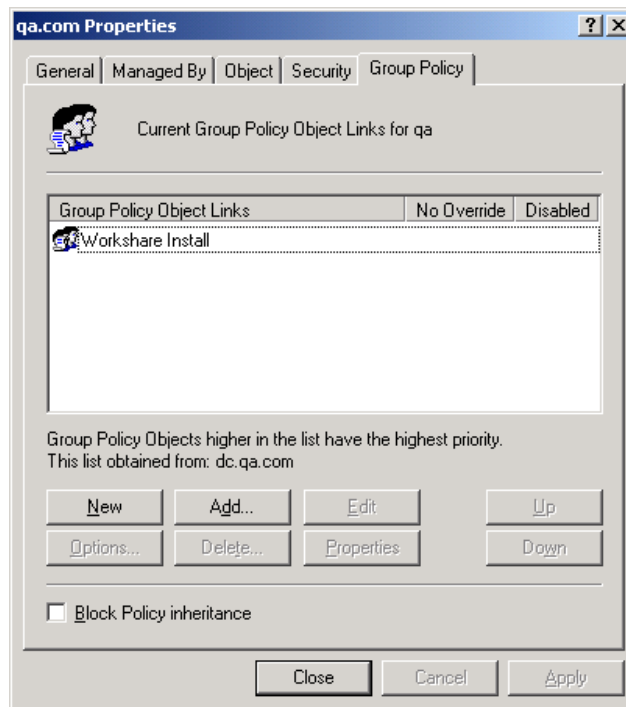
18. Select the new policy in the upper area and click the **Properties** button.

19. In the **Security** tab, click **Add**. A list of users in the organizational unit is displayed.

20. For all users to which you will deploy Workshare Professional, ensure that at a minimum the following permissions are selected:
    - **Read**
    - **Apply Group Policy**

21. For any users to which you do not want to deploy Workshare Professional, ensure that the **Apply Group Policy** permission is not selected.

22. Click **OK**.

23. In the **Group Policy** tab, select the policy in the upper area and click the **Edit** button. The *Group Policy* window is displayed.

24. Expand the **Computer Configuration** tree and the **Software Settings** node.
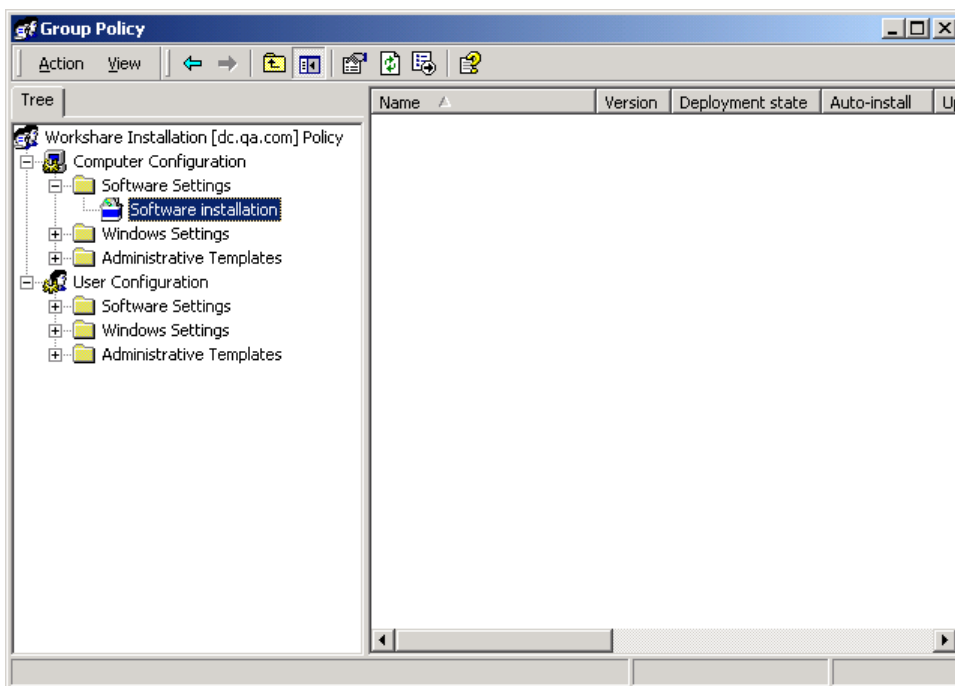
25. Right-click **Software installation** and select **New** then **Package**.

26. Browse to the shared folder and select the Professional.msi/WorkshareCompare.msi/ WorkshareProtect.msi file.

27. Click **Open**. The *Deploy Software* dialog is displayed.

28. Ensure that the **Advanced published or assigned** option is selected and click **OK**.

29. In the **Modifications** tab, click **Add**.

30. Browse to the transform (MST) file created in steps 4 to 13 and click **Open**.

31. Click **OK**.

32. In the *Group Policy* window, expand the **Administrative Templates** node and then the **Windows Components** node.

33. Select **Windows Installer**.

34. On the right side of the *Group Policy* window, double-click **Logging**.

35. Select the **Enabled** radio button and in the **Logging** field, enter **voicewarmup**.

36. Click **OK**. Logging of Windows Installer is now enabled. The log file generated will be in the format **msi<random letters and numbers>.log**.

37. Close the *Group Policy* window and close the organization unit's *Properties* window.

38. Repeat steps 15 to 36 for other organizational units to select all the users (machines) to which you want to deploy Workshare Professional.

Repeat the procedure above for the WorksharePDFConverter.msi. Ensure the precedence of the group policy objects is specified as shown below.
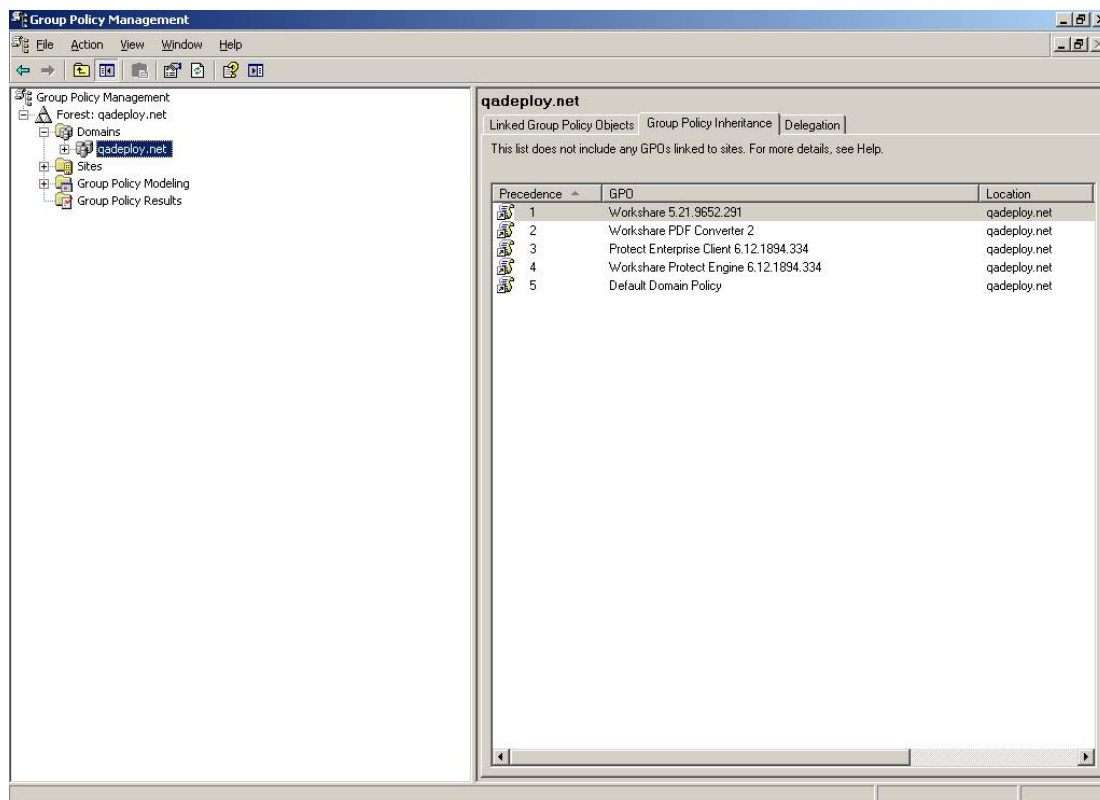
The Workshare package is now ready to be deployed on a per-machine basis. The next time the client machines are rebooted, Workshare will be installed.

> *Note: Client machines may have to be rebooted more than once depending on their configuration.*

Deploying Workshare Desktop

> *Note: Before installing using this method, please refer to the section, Deploying via the Command Line, page 66.*

To deploy Workshare Desktop using Active Directory:

1. On the Windows Server machine, create a shared folder with relevant permissions so that client machines can access the Workshare MSI during the automatic installation.

2. Extract the Workshare.Desktop.Dual.msi file from the EXE install file and copy it into the folder created in step 1.

3. Create a transform (MST) file. The transform file is used to specify properties, such as ENABLE_UPDATES, during the installation. The following procedure describes how to create a transform file using the Orca utility provided in the Windows Installer Software Developers Kit.

4. Launch Orca.

5. Open the Workshare.Desktop.Dual.msi file.

6. From the *Transform* menu, select **New Transform**. In the title bar of the window, **transformed by Untitled** is displayed in parenthesis the name of the msi.

7. In the left pane, select the **Property** table.

8. Right-click in the right pane and select **Add Row**.

9. Select **Property** in the upper area and enter **ENABLE_UDPATES** in the lower area.

10. Select **Value** in the upper area and enter 0 to disable updates

11. Click **OK**.

12. Repeat steps 8 to 11 for additional properties as required. You can add any of the properties specified on page 72.

13. From the *Transform* menu, select **Generate Transform** and the save the transform file to the shared folder created in step 1.

14. From the Start menu, launch **Active Directory Users and Computers**. A list of organizational units is displayed on the left side.
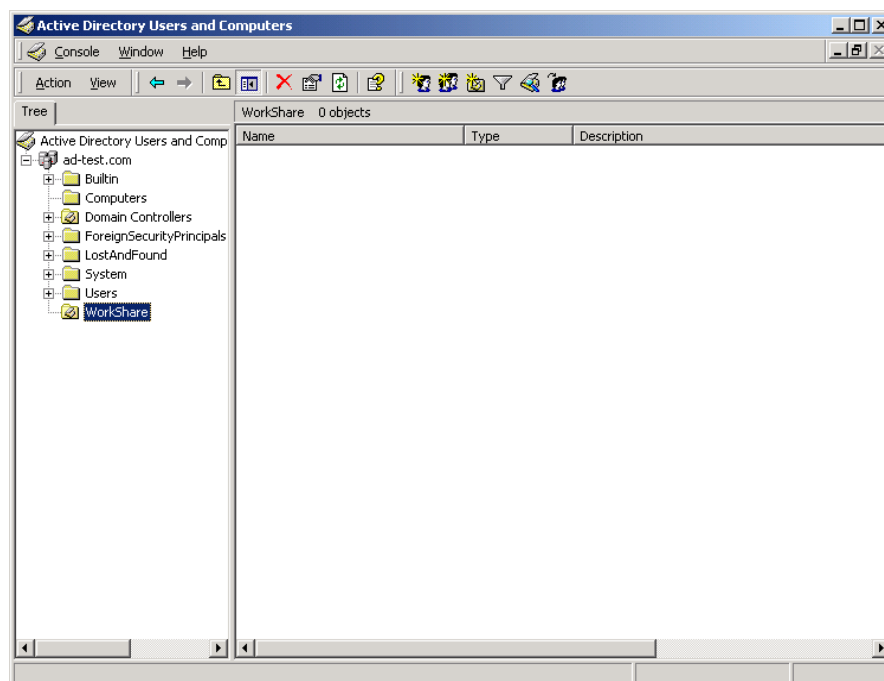
15. You now have to configure a group policy for the users to which you will deploy Workshare Desktop. This is done for each organizational unit that includes users to which you want to deploy.

16. Right-click an organizational unit and select **Properties**.

17. In the **Group Policy** tab, click the **New** button and enter a name for the new policy.

18. Select the new policy in the upper area and click the **Properties** button.

19. In the **Security** tab, click **Add**. A list of users in the organizational unit is displayed.

Workshare

20. For all users to which you will deploy Workshare Desktop, ensure that at a minimum the following permissions are selected:

   □ **Read**

   □ **Apply Group Policy**

21. For any users to which you do not want to deploy Workshare Desktop, ensure that the **Apply Group Policy** permission is not selected.

22. Click **OK**.

23. In the **Group Policy** tab, select the policy in the upper area and click the **Edit** button. The *Group Policy* window is displayed.

24. Expand the **Computer Configuration** tree and the **Software Settings** node. The following instructions will install Workshare Desktop per machine.
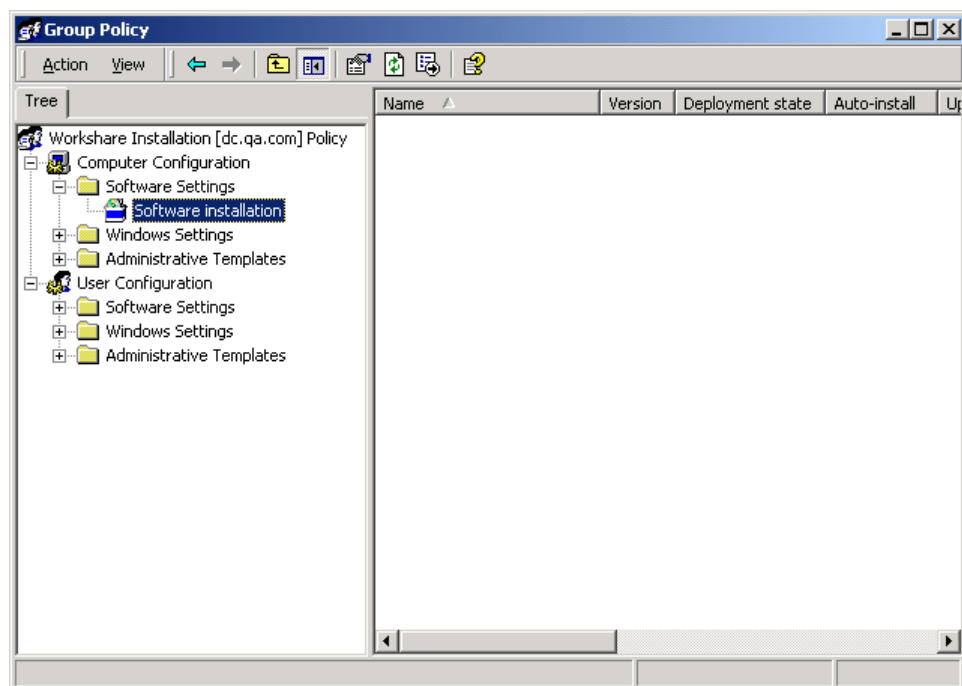
25. Right-click **Software installation** and select **New** then **Package**.

26. Browse to the shared folder and select Workshare.Desktop.Dual.msi file.

27. Click **Open**. The *Deploy Software* dialog is displayed.

28. Ensure that the **Advanced published or assigned** option is selected and click **OK**.

29. In the **Modifications** tab, click **Add**.

30. Browse to the transform (MST) file created in steps 4 to 13 and click **Open**.

31. Click **OK**.

32. In the *Group Policy* window, expand the **Administrative Templates** node and then the **Windows Components** node.

33. Select **Windows Installer**.

34. On the right side of the *Group Policy* window, double-click **Logging**.

35. Select the **Enabled** radio button and in the **Logging** field, enter **voicewarmup**.

36. Click **OK**. Logging of Windows Installer is now enabled. The log file generated will be in the format **msi<random letters and numbers>.log**.

37. Close the *Group Policy* window and close the organization unit's *Properties* window.

38. Repeat steps 15 to 36 for other organizational units to select all the users (machines) to which you want to deploy Workshare Desktop.

The Workshare Desktop package is now ready to be deployed on a per-machine basis. The next time the client machines are rebooted, Workshare Desktop will be installed.

> *Note: Client machines may have to be rebooted more than once depending on their configuration.*

Appendix A.   Additional Msiexec.exe Parameters and Switches

The executable program that interprets packages and installs products is msiexec.exe. Note that msiexec also sets an error level on return that corresponds to system error codes. The following table describes the parameters and switches for this program. For the latest Msiexec.exe Parameters and Switches, please refer to http://msdn2.microsoft.com/en-us/library/aa367988.aspx.

Switch	Parameters	Meaning
/i	Package|ProductCode	Installs or configures a product.
/f	[p|o|e|d|c|a|u|m|s|v] Package|ProductCode	Repairs a product. This option ignores any property values entered on the command line. The default argument list for this option is 'pecms'. This option shares the same argument list as the REINSTALLMODE property. p Reinstall only if file is missing. o Reinstall if file is missing or if an older version is installed. e Reinstall if file is missing or an equal or older version is installed. d Reinstall if file is missing or a different version is installed. c Reinstall if file is missing or the stored checksum does not match the calculated value. Only repairs files that have msidbFileAttributesChecksum in the Attributes column of the File table. a Force all files to be reinstalled. u Rewrite all required user specific Registry entries. m Rewrite all required computer-specific Registry entries. s Overwrite all existing shortcuts. v Run from source and re-cache the local package. Do not use the v reinstall option for the first installation of an application or feature.
/a	Package	Administrative installation option. Installs a product on the network.
/x	Package|ProductCode	Uninstalls a product.

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Switch	Parameters	Meaning
/j	[u|m]Package or [u|m]Package /t Transform List or [u|m]Package /g LanguageID	Advertises a product. This option ignores any property values entered on the command line. u Advertise to the current user. m Advertise to all users of machine. g Language identification. t Applies transform to advertised package.
/L	[i|w|e|a|r|u|c|m|o|p|v|+|!]Logfile	Specifies path to log file and the flags indicate which information to log. i Status messages w Non-fatal warnings e All error messages a Start up of actions r Action-specific records u User requests c Initial UI parameters m Out-of-memory or fatal exit information o Out-of-disk-space messages p Terminal properties v Verbose output + Append to existing file ! Flush each line to the log "*" Wildcard, log all information except for the v option. To include the v option, specify "/l*v".

Switch	Parameters	Meaning
/m	filename	Generates an SMS status .mif file. Must be used with the install (-i), remove (-x), administrative installation (-a), or reinstall (-f) options. The ISMIF32.DLL is installed as part of the SMS and must be on the path.
		The fields of the status mif file are filled with the following information:
		Manufacturer - Author
		Product - Revision Number
		Version - Subject
		Locale - Template
		Serial Number - not set
		Installation - set by ISMIF32.DLL to "DateTime"
		InstallStatus - "Success" or "Failed"
		Description - Error messages in the following order: 1) Error messages generated by installer. 2) Resource from Msi.dll if install could not commence or user exit. 3) System error message file. 4) Formatted message: "Installer error %i", where %i is error returned from Msi.dll
/p	PatchPackage	Applies a patch. To apply a patch to an installed administrative image you must combine options as follows:
		/p <PatchPackage> /a <Package>
/q	n|b|r|f	Sets user interface level.
		q No UI
		qn No UI
		qb Basic UI. Use qb! to hide the Cancel button.
		qr Reduced UI with no modal dialog displayed at the end of the installation.
		qf Full UI and any authored FatalError, UserExit, or Exit modal dialoges at the end.
		qn+ No UI except for a modal dialog displayed at the end.
		qb+ Basic UI with a modal dialog displayed at the end. The modal box is not displayed if the user cancels the installation. Use qb+! or qb!+ to hide the Cancel button.
		qb- Basic UI with no modal dialoges. Please note that /qb+- is not a supported UI level. Use qb-! or qb!- to hide the Cancel button.
		Note that the ! option is available with Windows Installer version 2.0 and works only with basic UI. It is not valid with full UI.
/? or /h		Displays copyright information for the Windows Installer.

Switch	Parameters	Meaning
/y	Module	Calls the system API DllRegisterServer to self-register modules passed in on the command line. For example, msiexec /y my_file.dll.
		This option is only used for Registry information that cannot be added using the Registry tables of the MSI file.
/z	Module	Calls the system API DllUnRegisterServer to unregister modules passed in on the command line. For example, msiexec /z my_file.dll.
		This option is only used for Registry information that cannot be removed using the Registry tables of the MSI file.

The options /i, /x, /f[p|o|e|d|c|a|u|m|s|v], /j[u|m], /a, /p, /y and /z should not be used together. The one exception to this rule is that patching an administrative installation requires using both /p and /a. The options /t and /g should only be used with /j. The options /l and /q can be used with /i, /x, /f[p|o|e|d|c|a|u|m|s|v], /j[u|m], /a, and /p.

Appendix B.   Default Profile

A profile is a collection of policies that include a set of instructions to Workshare Protect as to what metadata to remove from an email attachment and whether to convert the attachment to PDF.

Workshare Protect uses a default profile called **WorkshareClient.policy** at the following location: ProgramData/Workshare/PolicySets/ClientProfiles/Default/. The same profile can also be found in a user's local folder as follows: Users/[current user]/Documents/My Policies. When a new user logs in, the default profile is copied to their My Policies folder.

Additionally, a copy of this profile is created in a file called **WorkshareClient.runtimepolicy** at the following location: ProgramData/Workshare/PolicySets/ClientProfiles/Default/. It is actually the runtimepolicy file that Workshare Protect applies as the profile.

A user can change the profile by modifying the parameters in the Workshare Configuration Manager. Any changes made there update the following files: **WorkshareClient.runtimepolicy** (in the user's My Policies folder) and **WorkshareClient.runtimepolicy**.

The default profile includes the following policies:

Document Conversion Policy

This policy converts Microsoft Office files to PDF when they are emailed.

This policy includes the following expression:

- File type is Word, Excel, PowerPoint or RTF.

The actions to apply when the condition is met are as follows:

- Email Channel Action: Everyone to Internal: PDF; Everyone to External: PDF (meaning the document is converted to PDF when emailed to an external or an internal recipient)

Hidden Data Policy

This policy prevents the unauthorized disclosure of hidden data such as track changes, speaker notes and hidden columns. Depending on the type of hidden data and user privilege, the data is either automatically removed or the user is given the choice to clean the data or disregard the alert.

This policy includes the following expressions:

- Any document (Microsoft Word, Excel or PowerPoint, or RTF) contains high risk hidden data (comment, track change item, hidden text, small text, white text, version, auto version, link, speaker notes, hidden slides), or

- Any document contains medium risk hidden data (reviewer, hyperlink, routing slip, variable, macro, custom property, ink annotations), or

- Any document contains low risk hidden data (attached template, field, built-in property, document statistic, smart tag)

The action to apply when the condition is met is as follows:

- Email Channel Action: Everyone to External: Clean Hidden Data (meaning when the document is emailed to an external recipient, the hidden data is removed from the document)

Hidden PDF Data Policy

This policy prevents the unauthorized disclosure of hidden data such as markups, properties, attachments and bookmarks.

This policy includes the following expression:

- Any PDF document contains markups, properties, attachments and bookmarks.

The action to apply when the condition is met is as follows:

- Email Channel Action: Everyone to Internal: Clean hidden data; Everyone to External: Clean hidden data (meaning when the document is emailed to an external recipient, the hidden data is removed from the document)

Full Document Restriction Policy

This policy prevents documents that have the Workshare classification "full document restriction" from being emailed.

This policy includes the following expressions:

- Any file type has a Workshare 'Full Restriction' status.
- Custom property 'WSClassification' is 'Full Restriction'

The action to apply when the condition is met is as follows:

- Email Channel Action: Everyone to Internal: Block; Everyone to External: Block (meaning the document cannot be emailed to an external or an internal recipient)

External Document Restriction Policy

This policy prevents documents that have the Workshare classification "external document restriction" from being emailed externally.

This policy includes the following expressions:

- Any file type has a Workshare 'External Only Restriction' status.
- Custom property 'WSClassification' is 'External Only Restriction'

The actios to apply when the condition is met is as follows:

- Email Channel Action: Everyone to External: Block (meaning the document cannot be emailed to an external recipient)

For Internal Use Only Policy

This policy prevents documents that have the Workshare classification "for internal use only" from being emailed externally.

This policy includes the following expression:

- Custom property 'WSClassification' is 'For Internal Use Only'

The actions to apply when the condition is met are as follows:

- Email Channel Action: Everyone to External: Block (meaning the document cannot be emailed to an external recipient)

Confidential Policy

This policy alerts users when documents that have the Workshare classification "confidential" are emailed the Workshare Protect *Email Security* dialog is used. This policy does not alert for the *Protect Profile* dialog.

This policy includes the following expression:

- Custom property 'WSClassification' is 'Confidential'

The action to apply when the condition is met is as follows:

- Email Channel Action: Everyone to Internal: Alert; Everyone to External: Alert (meaning when the document is emailed to an external or an internal recipient, the user is alerted)

Highly Confidential Policy

This policy prevents documents that have the Workshare classification "highly confidential" from being emailed.

This policy includes the following expression:

- Custom property 'WSClassification' is 'Highly Confidential'

The action to apply when the condition is met is as follows:

- Email Channel Action: Everyone to Internal: Block; Everyone to External: Block (meaning the document cannot be emailed to an external or an internal recipient)

Appendix C. Workshare Prerequisites

Summary

The prerequisites for Workshare 7 depend on the version of the operating system and the version of Microsoft Office. They are listed on page 13 and further details provided in this appendix. Prerequisites for other versions of Workshare may be slightly different.

Microsoft .NET Framework 4.0

Summary

The full version of Microsoft .NET Framework 4.0 (no service pack) is required.

Checks

Checker	Registry Key	Check
Workshare InstallWizard	HKLM\Software\Microsoft\NET Framework Setup\NDP\v4\Full	Value Version=4.0.30319.0
Professional.msi/ WorkshareCompare.msi/ WorkshareProtect.msi	HKLM\Software\Microsoft\NET Framework Setup\NDP\v4\Full	Value Install exists

Install Files

OS	Installer
x86	http://download.microsoft.com/download/5/6/4/5641DA81-E6FA-4550-9F80-A1D862D9CFAA/dotNetFx40_Full_x86.exe
x64	http://download.microsoft.com/download/9/5/A/95A9616B-7A37-4AF6-BC36-D6EA96C8DAAE/dotNetFx40_Full_x86_x64.exe

Microsoft Visual C++ 2010 SP1 Redistributable Package (x86)

Summary

Microsoft Visual C++ 2010 SP1 Redistributable Package (x86) is required.

Checks

Checker	Upgrade Code	Check
Workshare Install Wizard	{1F4F1D2A-D9DA-32CF-9909-48485DA06DD5}	The upgrade code is used to find an installed version of the package which has a higher version number than 10.0.40219.
Professional.msi/ WorkshareCompare.msi/ WorkshareProtect.msi	{1F4F1D2A-D9DA-32CF-9909-48485DA06DD5}	The upgrade code is used to find an installed version of the package which has a higher version number than 10.0.40219.

Install Files

OS	File
All versions	http://download.microsoft.com/download/C/6/D/C6D0FD4E-9E53-4897-9B91-836EBA2AACD3/vcredist_x86.exe

Microsoft Visual C++ 2010 SP1 Redistributable Package (x64)

Summary

Microsoft Visual C++ 2005 SP1 Redistributable Package (x64) is required for the native x64 code in the application.

Checks

Checker	Registry Key	Check
Workshare Install Wizard	{5B75F761-BAC8-33BC-A381-464DDDD813A3}	The upgrade code is used to find an installed version of the package which has a higher version number than 10.0.40219.
Professional.msi/ WorkshareCompare.msi/ WorkshareProtect.msi	{5B75F761-BAC8-33BC-A381-464DDDD813A3}	The upgrade code is used to find an installed version of the package which has a higher version number than 10.0.40219.

Install Files

OS	File
All 64 bit versions	http://download.microsoft.com/download/A/8/0/A80747C3-41BD-45DF-B505-E9710D2744E0/vcredist_x64.exe

KB935514 – Update for Office 2007

Summary

The KB935514 Update for Office 2007 is required for Office 2007 (no service pack). This update has been included in Office 2007 service pack 1.

Checks

Checker	File / Registry Key	Check
Workshare Install Wizard	[OFFICE2007_PATH]\WWLIB.DLL	File version is 12.0.6016.5000 or greater
Professional.msi/ WorkshareCompare.msi/ WorkshareProtect.msi	[OFFICE2007_PATH]\WWLIB.DLL	File version is 12.0.6016.5000 or later

Install Files

Office Version	File
Office 2007	http://download.microsoft.com/download/8/2/4/8242897a-5aef-4ffa-bfb0-02a25c26fd01/office-kb935514-fullfile-x86-glb.exe

Microsoft Visual Studio 2010 Tools for Office Runtime Setup

Summary

Required to run Microsoft Office based solutions built using Microsoft Visual Studio 2010 and 2012.

Checks

Checker	Registry Key	Check
Workshare Install Wizard	HKLM\Software\Microsoft\VSTO Runtime Setup	V4R\Version >= 10.0.40303 OR V4\Version >= 10.0.31007
Professional.msi/ WorkshareCompare.msi/ WorkshareProtect.msi <updatemspname>.msp	HKLM\Software\Microsoft\VSTO Runtime Setup	V4R\Version >= 10.0.40303 OR V4\Version >= 10.0.31007

Install Files

OS	File
All versions	http://www.microsoft.com/en-us/download/details.aspx?id=35594

Workshare