



## **Workshare Protect 8**

Release Notes

## Company Information

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Workshare Protect Release Notes

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## What is Workshare Protect?

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Workshare Protect is seamlessly integrated with Microsoft Office and automatically enforces company security policy at end-user workstations. Rather than simply block information flow, Workshare Protect warns and educates users in real-time about sensitive information and, if authorized, lets users decide how to treat the content. Workshare Protect provides:

- **Hidden Data/Metadata Removal**
  - Policy driven content risk management
  - Discovery and removal of hidden data and visible content leaks
  - Complete metadata protection for Microsoft Office and PDF documents
- **Storage of Attachments in Workshare Online**
  - Uploading attachments to Workshare Online and sending recipients links to the documents
  - Frees users from having to send attachments by email
  - Facilitating the sharing of files outside of email
- **Tamper-Proof PDF Creation**
  - Converting any document to Workshare's secure PDF from any application
  - Ensuring flexible publishing and complete PDF security options
  - Enforcing automatic conversion of documents to secure PDF before they can be emailed
- **Stopping of Violations in Real Time**
  - Enabling users to fix potential problems with manual redaction options
  - Password-protecting documents or restricting them from being sent externally, or at all.
- **Content Protection and Control**
  - Content analysis and data leak prevention
  - Automatically stopping leaks of intellectual property at their origin
  - Keeping data safe and secure from embarrassing public disclosures
  - Monitoring all communications at the client level
  - Providing alerts for data in use, at rest, and in motion—even when disconnected from the network

***Note:** Workshare Protect can be installed without Microsoft Office integration. In this case, the metadata removal functionality is only available when sending emails and PDF creation is available through the right-click menu.*

## What's New in Workshare Protect 8

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Workshare Protect 8 includes the following new features:

- **Interactive Protect**

Workshare Protect provides at-a-glance details of all hidden metadata in attachments and what actions are recommended to eliminate risk BEFORE clicking Send. As soon as attachments are added to an email, Workshare Protect starts scanning. This not only allows users to continue working, but also eliminates any issues with other Outlook add-ins.

The Interactive Protect panel is integrated into the email message window and offers the user options to control documents and secure attachments before sending the email. Users are shown a summary of what metadata has been identified and they can select to remove metadata, convert to PDF or compress the attachments. In addition, attachments can be sent using secure file transfer (see below).

- **Secure File Transfer**

Workshare Protect provides the option to send files securely directly from Microsoft Outlook. Users can send attachments to a secure location in Workshare Online and send recipients a link to that location.

- **Secure File Sharing and Synchronization**

Workshare Protect supports the ability to access and share files from anywhere and any device with secure file sharing built-in.

- **PDF/A support**

Workshare Protect supports the ability to convert documents to PDF/A - an archive format of PDF which has no external links referenced in the PDF and/or passwords. This type of format is not reliant on information from external sources such as hyperlinks, ensuring that the document can be reproduced in exactly the same way in years to come. It has now become a legal requirement in America that all documents submitted to the court must be in PDF/A format.

- **MSP Deployment**

Workshare Protect now supports individual MSP patches for fast tracks and MSP fix rollups. This means users can run the Workshare Configuration Assistant manually, continue to work without interruption, and deploy fast track patches within windows installer framework. Full product releases are via MSI and EXE files only.

- **Compatibility with Microsoft SharePoint 2013**

In addition, over 50 individual change requests have been addressed and many quality improvements made.

## System Requirements

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The system requirements for Workshare Protect 8 are as follows:

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

## Certified Environments

Workshare Protect 8 has been tested and certified in a number of environments. If your environment is not included in the following list, it may still be a compatible environment. Contact Workshare Customer Support ([support@workshare.com](mailto:support@workshare.com)) for any help.

For details of which environments previous versions of Workshare Protect was 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

## Important Information

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- **Licensing** – If the product is licensed on subscription basis, one month before your subscription license expires, you can choose to receive a popup Expiry Notice on a daily basis. You can configure Workshare Protect so that the Expiry Notice is displayed/not displayed as required. For further information, refer to the Licensing section in the Workshare Installation Guide.
- **Policies Not Triggered** – When emailing password-protected .docx documents, default policies are not being triggered. This is due to the Microsoft Word Security Update KB969604.
- **POP/IMAP** – Workshare Protect does not support Outlook when it is configured with a POP or IMAP account.

## Important Installation Information

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- **Workshare Online Accounts:** When your installation includes the Secure File Transfer module, all users that have the Protect client installed on their desktop will be registered against your Workshare Online account. A validation email is sent to each user. Only one automatic email is sent and only to these users. If the Secure File Transfer module is NOT included in the installation, a Workshare account will NOT be automatically created for each user.
- Workshare Protect installs program files to a sub-folder within the Workshare folder named **Modules**.
- **Install:** A user is unable to install Workshare Protect if Microsoft Windows Installer 3.1 is not installed. This can be downloaded from the following location <http://www.microsoft.com/downloads/details.aspx?FamilyID=889482FC-5F56-4A38-B838-DE776FD4138C&displaylang=en>.
- **Windows Vista:** For MSI installs the user must have administrative privileges for the Default Mail Client.
- **Internet Explorer:** You must ensure that your email application is set as the default mail program in Internet Explorer. In Internet Explorer, select **Internet Options** from the *Tools* menu. In the **Programs** tab, select your email program (Microsoft Outlook) from the **E-Mail** dropdown list. If this is not done, you will not be able to send a document for review.
- **Windows 7:** When UAC is set to **Default**, running the Workshare Protect install displays the UAC prompt. You must approve the prompt and Workshare Protect will be installed. Running the Workshare Protect MSI silently will fail when UAC is set to **Default** because the user is not given the opportunity to approve the UAC prompt. Therefore for silent installs, disable UAC.

- VSTO Prerequisite and Installation using MSI Modes:** The Workshare Protect 8.0 installer (msi and msp) will not check for the presence of the VSTO prerequisite. The installation will proceed without this prerequisite but the Workshare Outlook Add-in will not be available causing a loss of the Workshare Protect email functionality. If deploying Protect 8.0 using the msi or msp you must first deploy the VSTO. This note applies only to Office 2007 (all service packs) and Office 2010 (without a service pack). For Office 2010 SP1 and above and Office 2013, VSTO is already installed.

If you have installed any Alpha or Beta builds of Workshare Protect, we strongly recommend that you first uninstall them before installing Workshare Protect 8.

## Known Issues

The following are known issues in the Workshare Protect 8 release - for more information, please contact Customer Support.

ID	Details
13739	<b>Present Online - Windows 8/Office 2013</b> Errors are displayed with some Workshare functionality when using the Present Online features of Word.
17320	<b>Interactive Protect - Windows 7 SP1(x64)/Office 2010 SP2</b> A document is not deleted from the Interactive Protect panel when the attachment is deleted from the email through the "Cut/Ctrl+X" option.
17322	<b>Interactive Protect - Windows 7 SP1(x64)/Office 2010 SP2</b> A document is not deleted from the Interactive Protect panel when the attachment is deleted from the attached zip file.
17473	<b>Windows 7 SP1 (x64)/Office 2010 SP2/Lotus Notes 8.5.2 FP4</b> PDF/A status is not retained when another document is concatenated with it.
17542	<b>Attaching MSG triggers Secure File Transfer</b> When attaching an email to an email and sending externally, if Protect is configured to display the Protect Profile dialog, it does so but only with the choice of two profiles - Secure File Transfer and Clean & Secure File Transfer. Workaround: In order to send the email without applying secure file transfer, click Advanced Options and deselect the Apply Action checkbox.
17627	<b>Interactive Protect</b> When cleaning two files contained in a zip attachment where one file is password-protected, after Interactive Protect has cleaned the files, the recipient receives the zip file and BOTH files are now password-protected.
17709	<b>Interactive Protect - Windows 8 (x64)/Office 2013</b> When the attachment is a PowerPoint file with a Modify password, Interactive Protect displays an Open password prompt.
17778	<b>Interactive Protect – Windows 7 SP1/Office 2007 SP3</b> "Exception H result.. " error is displayed when user performs "open in word with Workshare" operation when Interactive Protect is in progress.

ID	Details
17834	<p><b>Interactive Protect - Windows 7 SP1/Office 2007 SP3, Windows 7 SP1/Office 2010 SP1</b></p> <p>The Interactive Protect panel is not always shown even if the 'Always show panel' checkbox is selected.</p>
17855	<p><b>Workshare Professional Install - Windows 8 (x64)/Office 2010 SP1/Open Text DM 5.3.1 Suite Patch 4</b></p> <p>After installing Workshare Professional or Workshare Protect standalone without selecting Secure File Transfer, the Workshare Desktop application is not installed as expected. However, if the Workshare Configuration Assistant is then run and Secure File Transfer is selected, still the Workshare Desktop application is not installed and the Secure File Transfer profiles are not available in the Protect Profile dialog.</p>
17893	<p><b>Upgrade - Windows 7 SP1/Office 2007 SP3 and Windows 7 SP1/Office 2010 SP1</b></p> <p>When upgrading from Workshare Protect 7.50 to Protect 8 (using "qb" msi mode of installation), the 'Display Add Large Attachment button (Outlook)' parameter is deselected by default in the Workshare Configuration Manager.</p>
17905	<p><b>Install - Windows 8 (x64)/Office 2013</b></p> <p>After selecting Secure File Transfer when installing and then running the Workshare Configuration Manager, the Secure File Transfer option is not selected.</p>
17906	<p><b>Workshare Protect Standalone</b></p> <p>When installing Workshare Protect and NOT selecting <b>Protect (File Sharing)</b>, it is not possible to select the option by running the Workshare Configuration Assistant.</p>
17967	<p><b>Interactive Protect – Convert to PDF</b></p> <p>'Failed to convert...' error is displayed while converting attachment to PDF/A using Interactive Protect when the Multilingual Support parameter is deselected in the Workshare Configuration Manager.</p>
18097	<p><b>Content Risk Report - Windows 8.1</b></p> <p>A content risk report is not generated when clicking <b>Report</b> in the Content Risk page of the Workshare panel.</p>
18747/18748	<p><b>Interactive Protect Encryption - Windows 7 SP1/Office 2010</b></p> <p>When converting attachments to PDF or compressing attachments from Interactive Protect and specifying a password, the attachment is converted to an encrypted PDF or compressed to an encrypted zip file even if the password in the password fields is deleted before clicking <b>Apply</b>.</p>
19035	<p><b>Interactive Protect - Windows 7 SP1/Office 2010</b></p> <p>The return receipt and expiry date permissions are not updated if set for a second time in Interactive Protect.</p>
19409	<p><b>Email Security Dialog</b></p> <p>When <b>Email Security dialog while discovering risk</b> has been selected for the <b>When sending emails with attachments show</b> parameter and clicking <b>Send</b> while the risk discovery process is in progress for an email with more than two attachments, the Clean action is not triggered and metadata is not removed from the attachments.</p>

ID	Details
20455/20591	<b>Excel and PDF/A</b> When converting an Excel file to PDF/A, the result is a PDF file.
20562	<b>Interactive Protect and Classified Documents</b> When sending documents classified with "Full Restriction" and converting them to PDF with a password from Interactive Protect, a 'Password required to discover metadata' message is displayed in the Interactive Protect message area.
20839	<b>Uploading Files to Workshare – Windows 8</b> 'Connection failed ..' message is displayed if the user restarts the system while uploading files to Workshare is in progress.
20857	<b>Sending Emails – Windows 8</b> When <b>No dialog (process actions transparently)</b> has been selected for the <b>When sending emails with attachments show</b> parameter and then using the Add Large Attachment functionality, the <i>Advanced Email Security Options</i> dialog is still displayed.

## Change Requests Fixed

The following are fixed customer change requests that have been validated for this release - for more information, please contact Customer Support.

CR #	FB#	Description
00246927	15630	Number of copies defaulting to 9999
00252322	15977	Batch Clean save option hidden from view when setting Windows DPI size to 125% (120DPI)
00239114	15294	"Access to the Path ..... is denied" sending an NRL link attachment, after opening the NRL link to send internally
00265209	16210	Error appears when cancelling sending an email
00252323	15930	Error: There has been an error. Do you still wish to send the email
00271733	16386	Sent date & time removed after cleaning MSG files with attachments
00235230	15088	WMOption.dll trigger memory dump and blue screen
00252323	15390	Error: There has been an error. Do you still wish to send the email
00288571	16947	Error occurs when attempting to clean or compare custom macro based documents
00302948	17271	Error: The following error occurred while processing the email: Content discovery failed.
00329422	17381	Outlook consumes large amount of memory
00225002	14878	Server was unable to process request – error: 80070005
00169548	7168	Document Providers Cannot Be Locked from Editing in WCM in DMS Environments
00169833	7474	Email Attachments Changing Order When Workshare COM Add-in Is Enabled

CR #	FB#	Description
00169883	7475	Unable to send emails with xlsx attachments after they have passed through Protect Server
00166468	7115	"Save" Option on Quick Access Toolbar is Greyed Out when "Save As" Option is Removed
00162551	10958	Ability to clean PDF properties and retain PDF/A standard
00247016	15674	Error when sending attachments and unchecking selected Protect Profile
00341862	17483	Unknown error: 0x8004225e
00316672	17272	Attachment duplicated when cleaning email with signature
00388367	18812	Error: Unrecognised login details when using send files securely if proxy is enabled
00374732	18593	Ability for Send and Protect button to show the Protect Profile dialog
00388572	18950	Cannot close email after clicking Reply or Reply All
00388380	18858	Metadata Removal options not retained after navigating to different tab in Email Security dialog
00374539	18300	Workshare Panel state not retained after creating new document or converting to pdf
00375295	18566	Convert to PDF option removes 'AUTOSAVE-PATH' from registry key hive
00181763	18994	Letter-sized PDFs are created from A4-sized source documents
00373030	18667	New messages saved in Drafts when Interactive Protect is enabled
00388307	18897	Workshare add-in causes light blue border to be displayed around inside of Word window
00357437	17999	Workshare freezes when 'Show a popup' option is enabled in Lotus Notes
00407607	19087	Attaching a document does not display Interactive Protect panel
00388325	18874	Workshare add-in in Word prevents NTPortable from clearing
00436257	18233	Unable to undo 'Set An Access Expiry Date' option
00402476	19027	Error message appears when opening a Word document
00366535	18226	Failed to browse for import document: An unhandled error occurred while attempting to save a file to the collaboration
00176556	8654	Email attachments are lost when forwarding a specific email
00432324	19580	Attachments are incorrectly positioned when you click 'Forward' from Sent items folder in Outlook
00431065	19552	Local Open or Save dialog does not appear in Excel
00440697	19823	Dialog: the following applications should be closed before continuing the installation and Workshare closes Windows Explorer
00374745	19796	Error message 'Contact your System Administrator - Workshare has not been configured to send large files with current settings. Please either remove large file(s) or contact your System Administrator' when sending large files and clicking Send and Protect

CR #	FB#	Description
00447511	20041	Email Security dialog does not appear when sending two megabytes or more file size
00184554	14295	Attachments appear to disappear from emails when using EMM
00341862	17483	Unknown Error: 0x8004225e
00176144	8526	DISP_E_MEMBERNOTFOUND error when forwarding an email with attachment
00357248	18242	The following error occurred while processing the email - Error: There has been an error. Do you still want to send the email?
00357528	18001	Send button does not respond when Workshare COM add-in is enabled
00374685	18365	Outlook crashes after forwarding email
00388367	18812	Error: Unrecognised login details when using Send Files Securely if proxy is enabled
00377925	18643	Ability to remove hidden table styles when cleaning hidden data
00466994	20373	Email Security dialog is displayed when emailing PDF files when all PDF processing turned off
00440630	20265	Professional.Options.Exporter.Launcher.exe stopped working error
00293932	18597	An error occurred while executing the PDF Clean action for the file
00385565	18710	Unable to connect to send link error
00407866	19159	Feature - ability to activate metadata cleaning before clicking Send.
00184354	14191	Workshare excel addin preventing Excel sheets from switching
00343149	17550	Error occurred when processing email – Exception from HRESULT: 0xB5904005
00182214	15338	Emails in Outbox due to “Delay Delivery” option cannot be edited
00173561	16414	Custom UI error appears when viewing email properties within Outlook
00374658	18364	PDF button in Word is not responding
00375118	18522	Error in action: an error occurred while executing the clean action for the attached pptx file
00377937	18638	Batch clean options are not visible when changing text size in Windows
00493349	20779	Unknown error 0x80131604 sending email after applying MS KB2863911 to Office 2013 SP0
00488051	20759	Ability to have the PDF option in Interactive Protect checked by default
00488253	20766	Emails with Chinese or French characters become unreadable after clicking Reply
00507900	21018	When deselecting the <b>Protect (File Sharing)</b> option (Secure File Transfer), an account is still created

## Contact Info

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