

Workshare Professional 8

Release Notes

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Company Information

Workshare Professional Release Notes

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Table of Contents

What is Workshare Professional	4
What's New in Workshare Professional 8	4
System Requirements	6
Certified Environments	6
Important Information	8
Important Installation Information	8
Known Issues	9
Change Requests Fixed	12
Contact Info	16



What is Workshare Professional

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

Workshare Professional is designed for the way that you work – within Microsoft Office. Workshare Professional integrates with your existing desktop productivity software Microsoft Word, Excel and PowerPoint and your email applications such as Microsoft Outlook or IBM Lotus Notes. In addition, many companies use Document Management Systems (DMSs) and/or Microsoft SharePoint to track and store key documents and Workshare Professional integrates out of the box with these.

Key features of Workshare Professional include:

- Advanced comparison features, including multiple version and category views, available from inside Office applications
- Advanced, interactive, in-Outlook metadata cleaning/PDF creation/secure link transformation
- Secure File Transfer from all devices and browsers with metadata removal and end-to-end encryption
- Centralized policy design and enforcement administrator tools
- Advanced document revision and review tools for Windows
- Integrated ECM/DMS and OCR integration with desktop comparison features
- Centralized user account management and control
- Owner-defined folder access and permission setting
- Positional commenting and reviewer communications with presence indicators
- Desktop Sync Apps for Windows and Mac OS
- Mobile apps for iPhones, iPads, and Android Tablets

What's New in Workshare Professional 8

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

• Compatibility with NetDocuments

The Workshare Compare functionality is extended to NetDocuments. Users can select documents and versions of documents from NetDocuments to compare as well as save comparisons into NetDocuments.

• PDF/A Support

Workshare Professional 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.

• OCR – Optical Character Recognition

Workshare now automatically performs OCR on scanned PDFs when comparing documents. Workshare Compare compares both regular text-based PDF files and image-based PDF files that originate from scanned documents. Workshare Compare compares regular PDFs by converting them to RTF before performing a comparison. With image-based PDF files, Workshare Compare will first apply OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text and then produce an RTF file.

• Compatibility with Worldox

Workshare Professional integrates fully with Worldox so that users can select documents from Worldox when comparing or sending for review. Additionally, the integration provides access to all the Workshare Professional functionality from Worldox using right-click options. So for example, users can compare, convert to PDF, combine into a single PDF as well as convert PDF files to DOC format. When comparing, users can browse in Worldox for documents or versions to compare as well as save comparisons (Redline documents) back into Worldox. Comparison of Worldox documents is performed from Workshare Compare, from the Workshare Panel in Microsoft Word or from within Worldox.

• Improved Comparison

Workshare Compare has enhanced handling of tables, shapes and objects when comparing.

• MSP Deployment

Workshare Professional 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 90 individual change requests have been addressed and many quality improvements made.



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.

Important Information

- Send For Review If an error appears "Workshare Protect was unable to process this email" when Sending for Review a user is advised to restart Microsoft Outlook.
- Secure PDFs Workshare Professional is unable to compare secure PDFs or convert secure PDFs to DOC format. Secure PDFs are PDF files with security settings configured.
- 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 Professional so that the Expiry Notice is displayed/not displayed as required. For further information, refer to the Licensing Workshare Professional 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 Professional does not support Outlook when it is configured with a POP or IMAP account.

Important Installation Information

- Workshare Online Accounts: When your Workshare Professional 8 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 Professional installs program files to a sub-folder within the Workshare folder named Modules.
- Install: A user is unable to install Workshare Professional 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 Professional install displays the UAC prompt. You must approve the prompt and Workshare Professional will be installed. Running the Workshare Professional 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 Professional 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 Professional 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 Professional, we strongly recommend that you first uninstall them before installing Workshare Professional 8.

Known Issues

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

ID	Details
13739	Present Online Windows 8/Office 2013 Errors are displayed with some Workshare functionality when using the Presnt Online features of Word.
16963	Compare - NetDocuments/Windows 7 SP1/Office 2010 SP1
	Recent top level folders (created while the Compare Documents window is open) are not shown when browsing NetDocuments for the original or modified file. The user must relaunch Compare to re-open the Compare Documents window. Newly created subfolders and files within the subfolders are shown as expected.
17320	Interactive Protect - Windows 7 SP1(x64)/Office 2010 SP2
	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	Interactive Protect - Windows 7 SP1(x64)/Office 2010 SP2
	A document is not deleted from the Interactive Protect panel when the attachment is deleted from the attached zip file.
17473	Windows 7 SP1 (x64)/Office 2010 SP2/Lotus Notes 8.5.2 FP4
	PDF/A status is not retained when another document is concatenated with it.
17542	Attaching MSG triggers Secure File Transfer
	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	Interactive Protect
	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.



ID	Details
17660	NetDocuments - Windows 7 x64, x86/Office 2007, 2010 A NetDocuments workspace with specific symbols in its name cannot be found using the 'Search workspace' field in the Open from NetDocuments dialog.
17663	NetDocuments - Windows 7 x64, x86/Office 2007, 2010 After searching for a NetDocuments workspace in the Open from NetDocuments dialog, the workspace appears in the list of Recent matters. However, if the Open from NetDocuments dialog is then closed and the user clicks Browse again in the Compare Documents dialog to reopen the Open from NetDocuments dialog, the workspace is no longer displayed in the Recent matters list.
17709	Interactive Protect - Windows 8 (x64)/Office 2013 When the attachment is a PowerPoint file with a Modify password, Interactive Protect displays an Open password prompt.
17739	Compare Password-Protected Files - SharePoint 2013 (x64)/Windows 8 (x64)/Office 2013 and Chinese Windows 7 (X86) SP1/Office 2013 An error is displayed when comparing password-protected .DOCX files in Fast Comparison mode.
17778	Interactive Protect – Windows 7 SP1/Office 2007 SP3 "Exception H result " error is displayed when user performs "open in word with Workshare" operation when Interactive Protect is in progress.
17834	Interactive Protect - Windows 7 SP1/Office 2007 SP3, Windows 7 SP1/Office 2010 SP1 The Interactive Protect panel is not always shown even if the 'Always show panel' checkbox is selected.
17836	Workshare Compare - Windows 7 SP1 (x64)/Office 2010 SP2/Lotus Notes 8.5.2 FP4/Open Text DM 5.3.1 COM Suite Patch 4 When the Default email attachment format for Workshare Compare is set to PDF/A, when emailing a comparison the document format field is empty for the Redline document-and an email is not created.
17855	Workshare Professional Install - Windows 8 (x64)/Office 2010 SP1/Open Text DM 5.3.1 Suite Patch 4 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.
17893	Upgrade - Windows 7 SP1/Office 2007 SP3 and Windows 7 SP1/Office 2010 SP1 When upgrading from Workshare Professional 7.50 to Professional 8 (using "qb" msi mode of installation), the Display Add Large Attachment button (Outlook) parameter is deselected by default in the Workshare Configuration Manager.
17895	MSI Install - Windows 8 (x64)/Office 2013/Lotus Notes 8.5.3 FP4/NetDocuments User unable to uninstall build which is installed using MSI QB or QR mode.



ID	Details
17905	Install - Windows 8 (x64)/Office 2013 After selecting Protect (File Sharing) when installing and then running the Workshare Configuration Manager, the Secure File Transfer option is not selected.
17906	Workshare Protect Standalone When installing Workshare Protect and NOT selecting Protect (File Sharing) , it is not possible to select the option by running the Workshare Configuration Assistant.
17967	Interactive Protect – Convert to PDF '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.
18097	Content Risk Report - Windows 8.1 A content risk report is not generated when clicking Report in the Content Risk page of the Workshare panel.
18747/18748	Interactive Protect Encryption - Windows 7 SP1/Office 2010 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 Apply .
19035	Interactive Protect - Windows 7 SP1/Office 2010 The return receipt and expiry date permissions are not updated if set for a second time in Interactive Protect.
19409	Email Security Dialog When Email Security dialog while discovering risk has been selected for the When sending emails with attachments show parameter and clicking Send 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.
20354	Worldox - Saving Redlines The user is not able to relate a Redline to the original or to the modified document when saving a comparison.
20455/20591	Excel and PDF/A When converting an Excel file to PDF/A, the result is a PDF file.
20562	Interactive Protect and Classified Documents 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.
20775	Install - Windows 8.1/Office 2010 SP2/DeskSite 9.0 Update 4 When selecting Microsoft Word (.doc) as the Default email attachment format in the Workshare Configuration Manager (Comparison > Administration category), this setting is not actually retained when sending Redline documents by email and PDF is the default format.



ID	Details
20839	Uploading Files to Workshare – Windows 8 'Connection failed' message is displayed if the user restarts the system while uploading files to Workshare is in progress.
20857	Sending Emails – Windows 8 When No dialog (process actions transparently) has been selected for the When sending emails with attachments show parameter and then using the Add Large Attachment functionality, the Advanced Email Security Options dialog is still displayed.
20910	Worldox – Convert to PDF When converting a document to PDF from Worldox and selecting to Save as related document and Email PDF as attachment , the Convert to PDF option is still available in Interactive Protect.

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
00180546	11839	Ability to only print pages with changes to PDF from command-line
00156310	15260	LISTNUM restart numbering incorrect in TER View
00271733	16386	Sent date & time removed after cleaning MSG files with attachments
00235230	15088	WMOption.dll trigger memory dump and blue screen
00245458	15460	Word minimizes when Manage changes is clicked inside Word
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
00329472	17460	Error : 'Failed to run 'Convert to Track Changes'



CR #	FB#	Description
00169548	7168	Document Providers Cannot Be Locked from Editing in WCM in DMS Environments
00135517	11029	RTF signature color changes when emailing redline
00169833	7474	Email Attachments Changing Order When Workshare COM Add-in Is Enabled
00169883	7475	Unable to send emails with xlsx attachments after they have passed through Protect Server
00145801	6790	Unable to remove 'Workshare Compare' Outlook shortcut
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
00146233	6794	List Numbering Incorrectly Displayed Within TER View
00173049	6794	List Numberings Are Incorrectly Displayed In TER
00341862	17483	Unknown error: 0x8004225e
00316672	17272	Attachment duplicated when cleaning email with signature
00374586	18363	Redline is displayed in text only comparison mode when comparing certain documents
00177457	16415	Legal Size documents are incorrectly rendered when converted to PDF
00388367	18812	Error: Unrecognised login details when using send files securely if proxy is enabled
00146233	6794	List numbering incorrectly displayed within Redline
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
00293983	17171	Tables are incorrectly rendered
00375052	18530	Ability to set Autonomy DMS server to default in WCA and to set the DMS default during the manual selection process
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
00374349	18560	'Ghost' Word window appears when using "Standard" Comparison Mode
00388752	19007	Compare hangs when Comparison Mode defaults to "Standard"
00357437	17999	Workshare freezes when 'Show a popup' option is enabled in Lotus Notes



CR #	FB#	Description
00407607	19087	Attaching a document does not display Interactive Protect panel
00388325	18874	Workshare add-in in Word prevents NTPortable from clearing
00411906	19300	Upgrade from Compare standalone 7 FP2 shows all Professional modules when running the Workshare Configuration Assistant
00407599	19083	Quotes are not displayed in the Redline when document font is set to Batang
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
00407736	19162	List numbering is displayed as grave accent symbols in the Redline
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
00447511	20041	Email Security dialog does not appear when sending two megabytes or more file size
00471002	20388	Styled numbering appears incorrect when running a comparison
00436370	19610	Blank redline is displayed when comparing certain PDF documents
00184554	14295	Attachments appear to disappear from emails when using EMM
00341862	17483	Unknown Error: 0x8004225e
00174325	18026	Unsupported DMS error is displayed when installing Workshare Professional when DeskSite/FileSite 9.0 is installed
00176144	8526	DISP_E_MEMBERNOTFOUND error when forwarding an email with attachment
00357429	17997	Underlined section is not rendered correctly in the Redline
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
00374911	18475	Field code numbering for ListNum are missing in the Redline
00374685	18365	Outlook crashes after forwarding email
00375124	18523	Extended table converting incorrectly when using PDF button in Redline



CR #	FB#	Description
00374721	18388	Redline incorrectly changed to letter size when emailing comparison documents
00173330	18719	Alternate class name populates document type with red 'x' when saving to DMS
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
00427326	19451	Random characters are inserted during comparison
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.
00436106	19564	Failed to run 'convert to track changes' error
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
00174325	18026	Unsupported DMS error is displayed when installing Workshare Professional when DeskSite/FileSite 9.0 is installed
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
00499963		Characters in list numbering appear as changed and numbering order is reset
00510426	21037	Disabling Customer Experience Reporting prevents Redline converting to PDF
00507900	21018	When deselecting the Protect (File Sharing) option (Secure File Transfer), an account is still created



Contact Info

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