

Workshare Configuration Options

Workshare Configuration Parameters

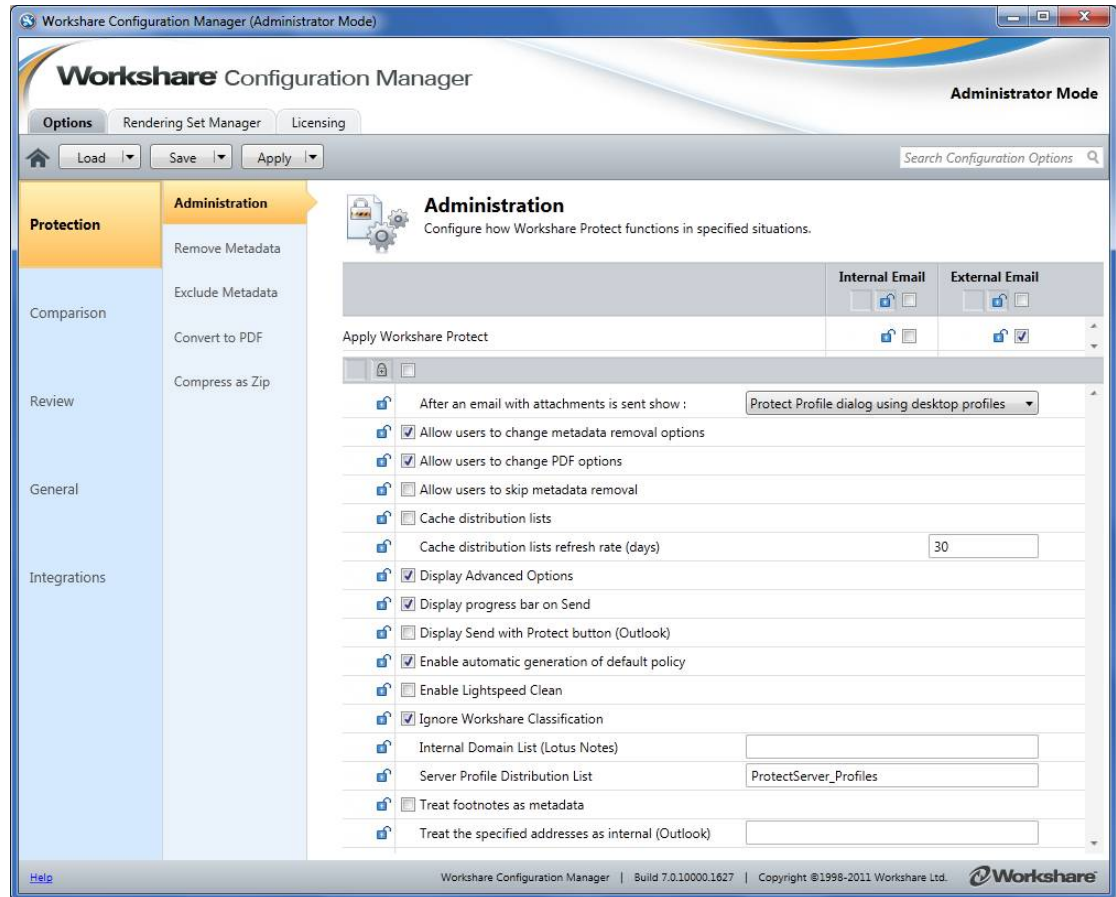
The configuration parameters for Workshare are grouped into categories and sub-categories as follows:

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Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in the following sections.

Protection > Administration

The **Protection > Administration** parameters enable you to specify how Workshare Protect functions in specific situations.



The **Protection > Administration** parameters are described in the following table:

Parameter	Description	Default
Apply Workshare Protect	If selected, Workshare Protect will check emails and their attachments to see if they breach any security policies.	Internal: Not selected External: Selected

Parameter	Description	Default
After an email with attachments is sent show	<p>Shows the required behavior when Workshare Protect is enabled and an email includes an attachment that is referenced by a profile. Options are:</p> <ul style="list-style-type: none"> • Protect Profile dialog using desktop profiles: The <i>Protect Profile</i> dialog is displayed after clicking Send. It provides a list of profiles available locally from which you can select to apply to your email. • Protect Profile dialog using server profiles: The <i>Protect Profile</i> dialog is displayed after clicking Send. It provides a list of profiles available on Workshare Protect Server from which you can select to apply to your email. • Email Security dialog while discovering risk: The <i>Email Security</i> dialog is always displayed. It is displayed immediately after clicking Send while Workshare Protect checks the email against the default profile. The options are enabled once the check is complete. • Email Security dialog for all mail: The <i>Email Security</i> dialog is always displayed. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. • Email Security dialog for internal mail only: The <i>Email Security</i> dialog is displayed when an email has internal recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to external recipients only, the <i>Email Security</i> dialog is not displayed. This is only relevant when Apply Workshare Protect is selected for Internal Email. • Email Security dialog for external mail only: The <i>Email Security</i> dialog is displayed when an email has external recipients. It is displayed after clicking Send once Workshare Protect has checked the email against the default profile. For email to internal recipients only, the <i>Email Security</i> dialog is not displayed. This is only relevant when Apply Workshare Protect is selected for External Email. • No dialog (process actions transparently): The <i>Email Security</i> dialog is not displayed. Workshare Protect processes the email and applies the default profile without any user intervention. 	Protect Profile dialog using desktop profiles
Allow users to change metadata removal options	<p>Administrator Mode Only.</p> <p>If selected, the Remove Comments and the Remove Track Changes checkboxes as well as the Hidden Data Options tab are available in the <i>Email Security</i> dialog. These options enable the user to specify exactly which hidden data types to remove from an attachment.</p> <p>This parameter has no effect on the <i>Protect Profile</i> dialog.</p>	Selected
Allow users to change PDF options	<p>Administrator Mode Only.</p> <p>If selected, the Convert to PDF checkbox as well as the PDF Options tab are available in the <i>Email Security</i> dialog. These options enable the user to specify whether or not to convert an attachment to PDF and what, if any, PDF security settings to apply.</p> <p>This parameter has no effect on the <i>Protect Profile</i> dialog.</p>	Selected

Parameter	Description	Default
Allow users to skip metadata removal	<p>Administrator Mode Only.</p> <p>If selected, the Skip Cleaning checkbox is enabled in the <i>Email Security</i> dialog and the Send without processing option is available in the <i>Protect Profile</i> dialog. In the <i>Email Security</i> dialog, this option enables the user to omit all metadata cleaning. In the <i>Protect Profile</i> dialog, this option enables the user to skip all processing, for example, all metadata cleaning and PDF conversion.</p>	Not selected
Cache distribution lists	<p>If selected, once Workshare Protect has resolved a distribution list (determined if it should be treated as external or internal), the results are stored locally. In this way, when the distribution list is used again, Workshare Protect can quickly determine whether to treat the email as internal or external.</p> <p>In addition, if this parameter is selected, when Microsoft Outlook is launched Workshare Protect will resolve all distribution lists in the global address book and store the results. This is done in the background.</p>	Not selected
Cache distribution lists refresh rate (days)	This parameter is relevant when the Cache distribution lists parameter is selected. The results from resolving distribution lists are refreshed after the specified number of days.	30
Display Advanced Options	If selected, the Advanced Options link is enabled in the <i>Protect Profile</i> dialog providing access to the <i>Email Security</i> dialog.	Selected
Display progress bar on Send	If selected, a progress bar appears when cleaning and sending an email.	Selected
Display Send with Protect button (Outlook)	<p>If selected, a Send and Protect button is displayed in email messages. Clicking this button enables the user to always access the <i>Email Security</i> dialog (regardless of policy settings) and specify cleaning or converting to PDF of attachments as required.</p> <p><i>Note: This button is not available in Microsoft Outlook 2003 when Microsoft Word is set as the email editor.</i></p>	Not selected
Enable automatic generation of default profile	<p>If selected, the default profile is regenerated when a value is changed in the Registry for an option in the Protection category. This change may be as a result of a manual change made in the Registry or by changing and applying a parameter value in the Protection category of the Workshare Configuration Manager. Additionally, the default profile is also regenerated when the Workshare Configuration Assistant is run.</p> <p>You may want to deselect this parameter if you want to deploy a personalized company profile and you do not want the default profile to exist as well.</p>	Selected
Enable Lightspeed Clean	If selected, when an email or its attachment triggers a Clean action, Workshare Protect will perform a Lightspeed clean. This type of cleaning is faster than a regular clean.	Not selected

Parameter	Description	Default
Ignore Workshare Classification on internal emails	If selected, Workshare document classification settings are not checked on attachments to internal emails.	Not selected
Internal Domain List (Lotus Notes)	In multi-domain Lotus Notes environments, specify the domain names of all internal servers to ensure that internal/external resolution works correctly. Separate each domain name with a semicolon.	
Server Profile Distribution List	The name of the distribution list on the Microsoft Exchange Server that is used to return the correct Workshare Protect Server profile email addresses. This is only relevant when selecting Protect Profile dialog using server profiles as the value for the After an email with attachments is sent show parameter.	ProtectServer_Profiles
Treat footnotes as metadata	If selected, footnotes are also treated as hidden data. You will be able to see the number of footnotes in a document in the Send Draft For Review page and also see details of the footnotes in a document in the Content Risk page.	Not selected
Treat the specified addresses as internal (Outlook)	You can specify any email addresses/distribution lists here that you would like to be treated as internal for the purpose of Workshare Protect applying policies. Separate multiple addresses with a semicolon.	

Protection > Remove Metadata

The **Protection > Remove Metadata** parameters enable you to specify what metadata should be removed by Workshare Protect in the following situations:

- Email attachments sent to internal recipients
- Email attachments sent to external recipients
- Open Microsoft Office documents (when discovering and removing content risk)

The parameters in this category list the types of metadata that can be removed by Workshare Protect. To select a metadata type, you select the checkbox to the right of the parameter in the relevant column – **Internal Email**, **External Email**, **Content Risk**.

Tip! You can select all parameters in a column by selecting the checkbox in the column header and then deselect one or two metadata parameters within that column as required.

The screenshot shows the 'Workshare Configuration Manager (Administrator Mode)' interface. The 'Remove Metadata' section is active, displaying a table of configuration options. The table has three columns: 'Internal Email', 'External Email', and 'Content Risk'. Each column has a header checkbox. The table lists various metadata types with checkboxes in each column to indicate whether they should be removed.

	Internal Email	External Email	Content Risk
Accept changes and turn off Track Changes (Word and Excel)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Convert attached template to Normal (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Convert field codes to text (Office)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete attachments (PDF)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete bookmarks (PDF)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete built-in properties (Office)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete comments (Office)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete custom properties (Office)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete document reviewers (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete document variables (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete footers (Excel and PowerPoint)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete footnotes (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete headers (Excel and PowerPoint)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete hidden slides (PowerPoint)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete hidden text (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete ink annotations (Lightspeed Clean only)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete links (Excel)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete macros (Word)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The **Protection > Remove Metadata** parameters are described in the following table:

Parameter	Description	Default
Accept changes and turn off Track Changes (Word and Excel)	Microsoft Word and Excel. If selected, accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked.	Not selected
Convert attached template to Normal (Word)	Microsoft Word only. If selected, converts the attached template to normal.dot. Automatic style updating is disabled before the template is removed. Therefore the formatting and styles in your document will not be affected by removing the attached template. To view the attached template: In MS Word 2003/XP, open the <i>Tools</i> menu and select Templates and Add-Ins . In MS Word 2007, click the Office Button, select Word Options and then select Add-Ins . From the Manage dropdown list, select Word Add-ins and click Go .	Internal: Selected External: Selected Documents: Not selected
Convert field codes to text (Office)	Microsoft Word, Excel and PowerPoint. If selected, converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index. In Microsoft Excel and PowerPoint, hyperlinks are converted to text. <i>Note: For Microsoft Excel and PowerPoint, hyperlinks are the only field codes that exist.</i> This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed. <i>Note: You can prevent certain field codes from being cleaned, for example, table of contents or page numbers, by selecting them in the Protection > Exclude Metadata category. Refer to page 14.</i> To view field codes: In MS Word 2003/XP, open the <i>Tools</i> menu and select Options . In the View tab, select the Field Codes checkbox in the Show area. In MS Word 2007, click the Office Button, select Word Options and then select Advanced . Select the Show field codes instead of their values checkbox in the Show document content area.	Internal: Selected External: Selected Documents: Not selected
Delete attachments (PDF)	PDF. If selected, removes any attachments to a PDF file. PDF attachments are separate files contained within the PDF document.	Internal: Selected External: Selected
Delete bookmarks (PDF)	PDF. If selected, removes any bookmarks in a PDF file.	Internal: Selected External: Selected

Parameter	Description	Default
Delete built-in properties (Office)	<p>Microsoft Word, Excel and PowerPoint. If selected, removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number.</p> <p>To view built-in properties: In MS Office 2003/XP, open the <i>File</i> menu and select Properties. In the <i>Properties</i> dialog, select the Summary and Contents tabs. In MS Office 2007, click the Office Button, select Prepare and then select Properties. In the Document Information Panel, select Advanced Properties from the Document Properties dropdown list. In the <i>Properties</i> dialog, select the Summary and Contents tabs.</p>	Internal: Selected External: Selected Documents: Not selected
Delete comments (Office)	<p>Microsoft Word, Excel and PowerPoint. If selected, removes any comments embedded in the document.</p> <p>By default this parameter is not selected.</p> <p>To display comments: In MS Office 2003/XP, open the Reviewing toolbar and from the Show dropdown list, select Comments. In MS Office 2007, click the Review tab and from the Balloons dropdown list (Tracking group), select Show Only Comments and Formatting in Balloons.</p>	Not selected
Delete custom properties (Office)	<p>Microsoft Word, Excel and PowerPoint. If selected, removes any custom properties that have been added to the document.</p> <div style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p>Note: You can prevent certain custom properties from being cleaned, for example, <i>DMS Doc ID Properties</i>, by selecting them in the Protection > Exclude Metadata category. Refer to page 14.</p> </div> <p>To view document properties: In MS Office 2003/XP, open the <i>File</i> menu and select Properties. In MS Office 2007, click the Office Button, select Prepare and then select Properties. In the Document Information Panel, select Advanced Properties from the Document Properties dropdown list. In the <i>Properties</i> dialog, select the Custom tab.</p>	Internal: Selected External: Selected Documents: Not selected

Parameter	Description	Default
Delete document reviewers (Word)	<p>Microsoft Word only. If selected, removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed.</p> <p>To see reviewers list: In MS Word 2003/XP, open the Reviewing toolbar and from the Show dropdown list, select Reviewers. In MS Office 2007, click the Review tab and from the Show Markup dropdown list (Tracking group), select Reviewers.</p> <p><i>Note: Clearing reviewers but not track changes, may be useful if you are collaborating on a document with an external party who uses track changes. You can retain the actual track changes made in the document, but you can remove confidential information about the author within your organization that made the change.</i></p>	Internal: Selected External: Selected Documents: Not selected
Delete document variables (Word)	<p>Microsoft Word only. If selected, deletes all document variables. Document variables are values stored in Microsoft Word documents that are used by either field codes or macros. These variables may contain confidential information like company names, or file locations. Even if field codes and macros are removed, the variables used may remain in the document.</p> <p>Variables can be viewed in Microsoft Word in the Visual Basic Editor.</p>	Internal: Selected External: Selected Documents: Not selected
Delete footers (Excel and PowerPoint)	<p>Microsoft Excel and PowerPoint. If selected, removes any footers included in the sheet or slide.</p> <p>To view headers and footers: In MS Excel and PowerPoint 2003/XP, open the <i>View</i> menu and select Header and Footer. In MS Excel and PowerPoint 2007, click the Insert tab and select Header & Footer (Text group).</p>	Internal: Selected External: Selected Documents: Not selected
Delete footnotes (Word)	<p>Microsoft Word only. If selected, removes any footnotes or endnotes included in the document.</p>	Not selected
Delete headers (Excel and PowerPoint)	<p>Microsoft Excel and PowerPoint. If selected, removes any headers included in the sheet or slide.</p> <p>To view headers and footers: In MS Excel and PowerPoint 2003/XP, open the <i>View</i> menu and select Header and Footer. In MS Excel and PowerPoint 2007, click the Insert tab and select Header & Footer (Text group).</p>	Internal: Selected External: Selected Documents: Not selected
Delete hidden slides (PowerPoint)	<p>Microsoft PowerPoint only. If selected, removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information.</p>	Internal: Selected External: Selected Documents: Not selected

Parameter	Description	Default
Delete hidden text (Word)	<p>Microsoft Word only. If selected, removes all text that has been formatted as hidden.</p> <p>To view hidden text: In MS Word 2003/XP, from the <i>Tools</i> menu, select Options. Select the View tab and in the Formatting marks section, select the Hidden Text checkbox. In MS Word 2007, click the Office Button, select Word Options and then select Display. Select the Hidden Text checkbox.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Delete ink annotations (Lightspeed Clean only)	<p>Microsoft Word, Excel and PowerPoint. If selected, removes ink annotations made in Tablet PC. Ink annotations are only removed by a Lightspeed clean.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Delete links (Excel)	<p>Microsoft Excel only. If selected, converts external links in Microsoft Excel files to text. The following are examples of external links:</p> <p>Link to a cell in another Microsoft Excel document.</p> <p>Named link to a named reference in another Microsoft Excel document.</p> <p>Link to another document.</p> <p>OLE link that inserts another document as an icon.</p> <p>OLE link that inserts another document as text.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Delete macros (Word)	<p>Microsoft Word only. If selected, removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros.</p> <p>To view macros: In MS Word 2003/XP, open the <i>Tools</i> menu and select Macro and then Macros. In MS Office 2007, click the View tab and select Macros and then View Macros.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Delete markups (PDF)	<p>PDF. If selected, removes any markup in a PDF file.</p> <p>Markup is a tool used to make comments and annotations to PDF documents.</p>	<p>Internal: Selected</p> <p>External: Selected</p>
Delete previous authors (Word)	<p>Microsoft Word only. If selected, removes information about all authors who have previously saved the document as well as save locations.</p> <p>This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>

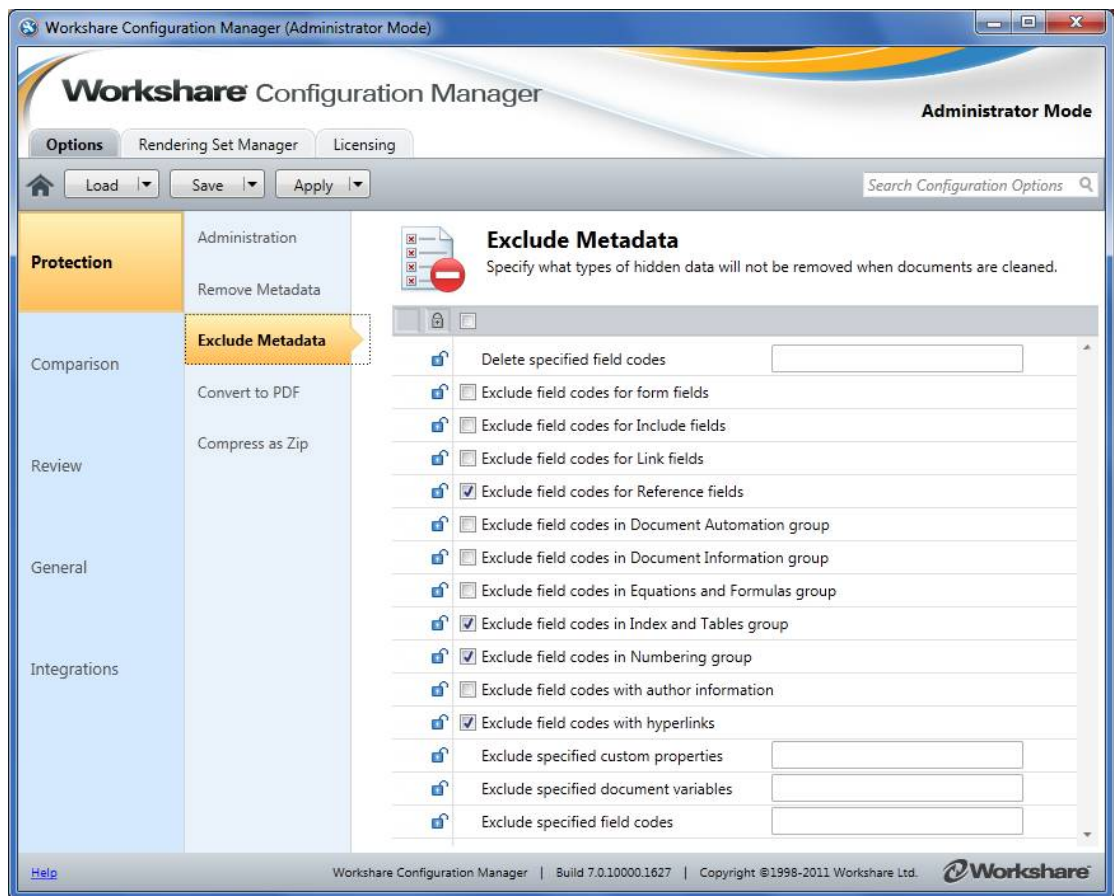
Parameter	Description	Default
Delete properties (PDF) – invalidates PDF/A status	<p>PDF. If selected, removes properties in a PDF file.</p> <p>Standard properties are details about a file that help identify it, including its title, subject, author, manager, company, category, keywords, comments, and hyperlink base</p> <p><i>Note: Removing properties from a PDF/A file will disable its PDF/A status.</i></p>	Internal: Selected External: Selected
Delete routing slip (Word and Excel 2003)	<p>Microsoft Word and Excel. If selected, removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information such as, recipients, subject and introduction, which are used when sending to a mail recipient. Routing slips are not supported in MS Office 2007 and above.</p> <p>To view routing slip entries: From the <i>File</i> menu, select Send To and then Routing Recipient. To view envelope information: From the <i>File</i> menu, select Send To and then Mail Recipient.</p>	Internal: Selected External: Selected Documents: Not selected
Delete Smart Tags (Word)	<p>Microsoft Word only. If selected, removes smart tags from Microsoft Word documents.</p> <p>Smart tags are added to your documents as you create them if the option is enabled. These tags are linked to particular text in a document, such as a name, and allow you to perform certain actions by selecting the link associated with the text. Depending on the smart tag functions you use, they may embed extra hidden information in your document.</p> <p>Smart tags only exist in Microsoft Office XP and later.</p> <p>To manage smart tags: In MS Word XP, open the <i>Tools</i> menu and select AutoCorrect Options. Select the Smart Tags tab. In MS Word 2007, click the Office Button, select Word Options and then select Proofing. Click the AutoCorrect Options button and select the Smart Tags tab.</p>	Internal: Selected External: Selected Documents: Not selected
Delete Speaker Notes (PowerPoint)	<p>Microsoft PowerPoint only. If selected, deletes all text that appears on the Notes Page in a Microsoft PowerPoint presentation. This is usually used by speakers to remind them of points during a presentation. You may want to remove speaker notes before distributing a presentation, as they are not usually intended for others to read.</p>	Internal: Selected External: Selected Documents: Not selected
Delete text smaller than 5pt (Word)	<p>Microsoft Word only. If selected, removes all text that has been formatted with a font size less than 5pt (i.e. 4pt and less).</p> <p>To view small text: In MS Word 2003/XP, from the <i>View</i> menu select Zoom and specify a percentage greater than 100%. In MS Word 2007, click the View tab, select Zoom and specify a percentage greater than 100%.</p>	Internal: Selected External: Selected Documents: Not selected

Parameter	Description	Default
Delete text with same color as background (Word)	<p>Microsoft Word only. If selected, removes all text that has been formatted with the same font color as that of the background.</p> <p>To view such text: In MS Word 2003/XP, from the <i>Tools</i> menu, select Options. Select the General tab and in the General options section, select the Blue background, white text checkbox. In MS Word 2007, click the Page Layout tab and select a color from the Page Color dropdown list (Page Background group).</p>	Not selected
Delete versions (Word 2003)	<p>Microsoft Word only. If selected, removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document.</p> <p>Document versions are not supported in MS Office 2007.</p> <p>To view versions: From the <i>File</i> menu, select Versions.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Reset document statistics (Word)	<p>Microsoft Word only. If selected, resets all the document statistics - total edit time, revision number, last authors, and file dates.</p> <p>To view statistics: In MS Word 2003/XP, open the <i>File</i> menu and select Properties. In the <i>Properties</i> dialog, select the Statistics tab. In MS Word 2007, click the Office Button, select Prepare and then select Properties. In the Document Information Panel, select Advanced Properties from the Document Properties dropdown list. In the <i>Properties</i> dialog, select the Statistics tab.</p> <div style="border: 1px solid #add8e6; padding: 5px; margin-top: 10px;"> <p><i>Note: This information cannot be cleaned from within Microsoft Word.</i></p> </div>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>
Turn off versioning (Word 2003)	<p>Microsoft Word only. If selected, turns off the flag to automatically save a new version of the document every time the document is closed. This applies to local file systems only. Versions can still be saved manually by saving a file with a different name.</p> <p>Versioning is not supported in MS Office 2007 and above.</p>	<p>Internal: Selected</p> <p>External: Selected</p> <p>Documents: Not selected</p>

Protection > Exclude Metadata

The **Protection > Exclude Metadata** parameters enable you to exclude certain types of metadata from being removed when documents are cleaned. The types of metadata that can be excluded from cleaning are custom properties and field codes. When cleaning, the user can still select to clean custom properties and all custom properties or field codes will be cleaned, except for the ones explicitly excluded here. These parameters apply when Workshare Protect is cleaning attachments as well as cleaning open Microsoft Office documents.

Note: When field codes are cleaned, the text is not removed. The field code is simply unlinked so that it is not updated in the future. For example, if you have a table of contents field code. Unlinking it keeps the table of contents in your document, but you are unable to update the table of contents, as it is no longer a field; it is only text.



The Protection > Exclude Metadata parameters which apply to all cleaning (internal email, external email and open documents) are described in the following table:

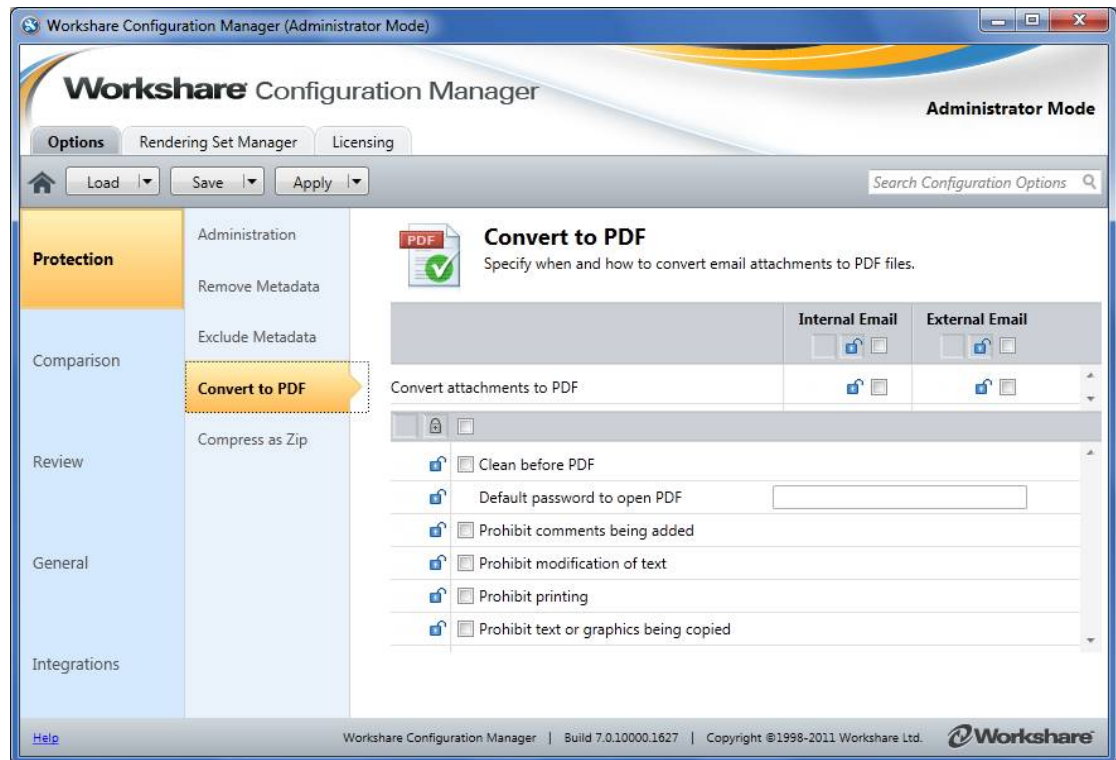
Parameter	Description	Default
Delete specified field codes	Microsoft Word only. Workshare Protect is configured to replace field codes with static text. However, by entering the field codes in this parameter, Workshare Protect will delete any instances of these field codes. To delete specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code you can do so by separating each field code with a semicolon.	
Exclude field codes for form fields	Microsoft Word only. These are field codes that are used in forms, for example, dropdown lists and text boxes. If selected, any form field codes are not cleaned. By default, these field codes are not excluded and therefore form fields are unlinked during cleaning.	Not Selected
Exclude field codes for Include fields	Microsoft Word only. These are field codes that include text or pictures from other sources. If selected, any 'include' field codes are not cleaned. By default, these field codes are not excluded and therefore 'include' fields are unlinked during cleaning.	Not selected
Exclude field codes for Link fields	Microsoft Word only. These are field codes for linked or imported objects. If selected, the links are not removed and therefore still update from the source. By default, these field codes are not excluded and therefore links are unlinked during cleaning.	Not selected
Exclude field codes for Reference fields	Microsoft Word only. These are field codes for any references within the document, for example, page references. If not selected, references are unlinked and therefore no longer automatically updated. By default, these field codes are excluded and therefore any references in your document remain fully functional.	Selected
Exclude field codes in Document Automation group	Microsoft Word only. These are field codes used to provide functions within a document, for example, macro buttons, mail merge functions, print functionality. If selected, these field codes remain linked which means the document automation features continue to work. By default these field codes are not excluded, and therefore document automation features are unlinked during cleaning.	Not selected

Parameter	Description	Default
Exclude field codes in Document Information group	<p>Microsoft Word only. These are field codes that reference any of the document properties, for example, subject and keywords, as well as any field codes that reference the document statistics, for example, create date and number of words.</p> <p>If selected, any field codes referencing the document properties or statistics are not cleaned.</p> <p>By default, these field codes are not excluded and therefore document information is unlinked during cleaning.</p>	Not selected
Exclude field codes in Equations and Formulas group	<p>Microsoft Word only. These are field codes for calculations, for example, equations, symbols or formula.</p> <p>If selected, equations remain linked.</p> <p>By default, these field codes are not excluded and therefore any equations are unlinked during cleaning.</p>	Not selected
Exclude field codes in Index and Tables group	<p>Microsoft Word only. These are field codes related to the Table of Contents, Table of Authorities, Glossary, and Index.</p> <p>If not selected, these tables are unlinked, and can therefore no longer be automatically updated.</p> <p>By default, these field codes are excluded and therefore Tables and Indexes in your document will remain fully functional.</p> <p><i>Note: Unlinking a Table of Contents causes the hyperlinks that reference each section of the document to stop working. It may also change the format of the Table of Contents to blue underlined text.</i></p>	Selected
Exclude field codes in Numbering group	<p>Microsoft Word only. These are field codes for numbering within the document, for example, page numbers, list numbers, section numbers.</p> <p>If not selected, these numbers are unlinked and therefore no longer automatically updated.</p> <p>By default, these field codes are excluded and therefore any numbering in your document remains fully functional.</p> <p><i>Note: Unlinking page numbers in headers or footers may cause page numbers to be repeated if a header or footer is shared between more than one page of the document.</i></p>	Selected
Exclude field codes with author information	<p>Microsoft Word only. These are field codes that include the Author, Last Saved By User, or Current User information.</p> <p>If selected, any field codes referencing the author or user are not cleaned.</p> <p>By default, these field codes are not excluded and therefore author information is unlinked during cleaning.</p>	Not selected

Parameter	Description	Default
Exclude field codes with hyperlinks	<p>Microsoft Word, Excel and PowerPoint. These are field codes for hyperlinks.</p> <p>If not selected, hyperlinks are unlinked. The text of the link is still visible but the associated address is removed.</p> <p>By default, these field codes are excluded and therefore hyperlinks in your document remain fully functional.</p>	Selected
Exclude specified custom properties	<p>Microsoft Word, Excel and PowerPoint. If you have custom properties in your documents that you never want to remove, for example, DMS DocIds, you can exclude them from both cleaning and discovery. To exclude custom properties, add the names of the custom properties to this parameter. If you want to specify more than one property you can do so by using a semicolon. If the custom property name includes a space, you must enclose it in quotes.</p> <p>For example, "Matter Id";DocumentName</p>	
Exclude specified document variables	<p>Microsoft Word only. If you have document variables in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude document variables, add the names of the document variable to this parameter. If you want to specify more than one document variable you can do so by using a semicolon.</p>	
Exclude specified field codes	<p>Microsoft Word only. If you have field codes in your documents that you never want to remove, you can exclude them from both cleaning and discovery. To exclude specific field codes, add the name of the field code to this parameter. If you want to specify more than one field code you can do so by separating each field code with a semicolon.</p>	

Protection > Convert to PDF

The **Protection > Convert to PDF** parameters enable you to specify whether Workshare Protect should convert attachments to PDF as well as set the default security settings applied when Workshare Protect performs conversion to PDF.



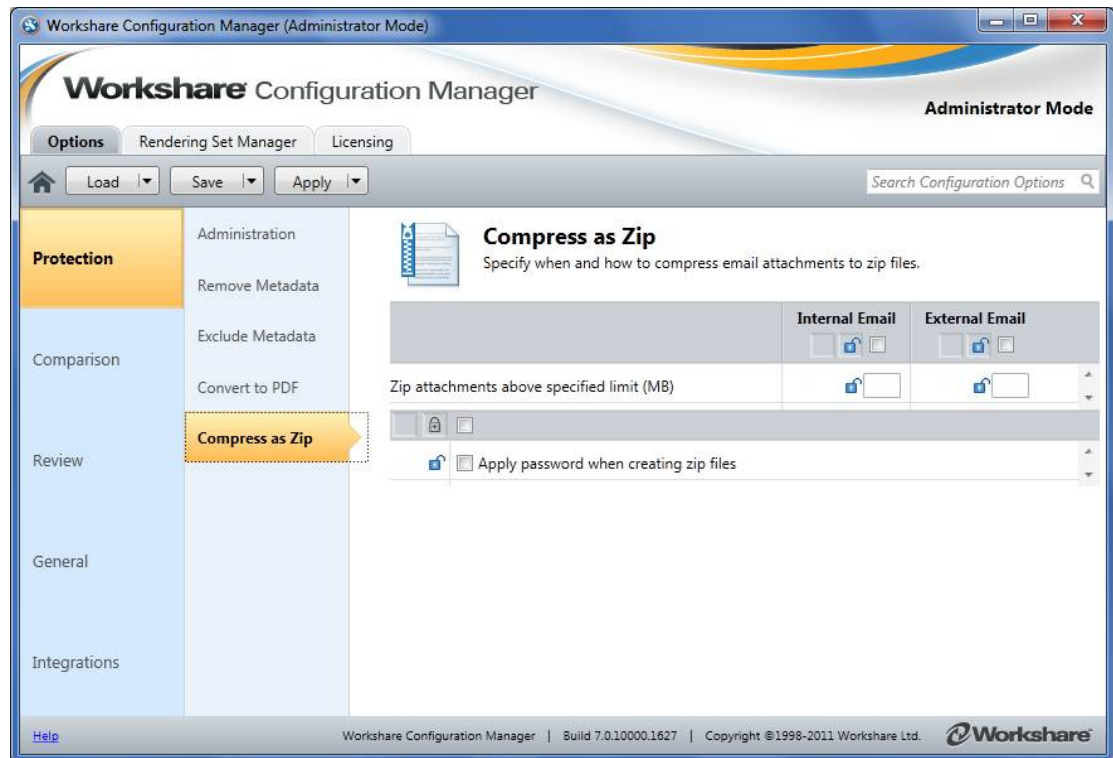
The Protection > Convert to PDF parameters are described in the following table:

Parameter	Description	Default
Convert attachments to PDF	If selected, Microsoft Office documents attached to the email are automatically converted to PDFs when the email is sent.	Internal: Not selected External: Not selected
Clean before PDF	If selected, the Clean before PDF checkbox in the PDF Security Settings dialog is selected by default.	Not selected
Default password to open PDF	The default password required to open PDF files after conversion by Workshare Protect.	
Prohibit comments being added	If selected, the Prohibit comments being added checkbox in the PDF Security Settings dialog is selected by default.	Not selected

Parameter	Description	Default
Prohibit modification of text	If selected, the Prohibit modification of text checkbox in the PDF Security Settings dialog is selected by default.	Not selected
Prohibit printing	If selected, the Prohibit printing checkbox in the PDF Security Settings dialog is selected by default.	Not selected
Prohibit text or graphics being copied	If selected, the Prohibit text or graphics being copied checkbox in the PDF Security Settings dialog is selected by default.	Not selected

Protection > Compress as Zip

The **Protection > Compress as Zip** parameters enable you to specify whether Workshare Protect should compress attachments into zip files and how it performs this functionality.

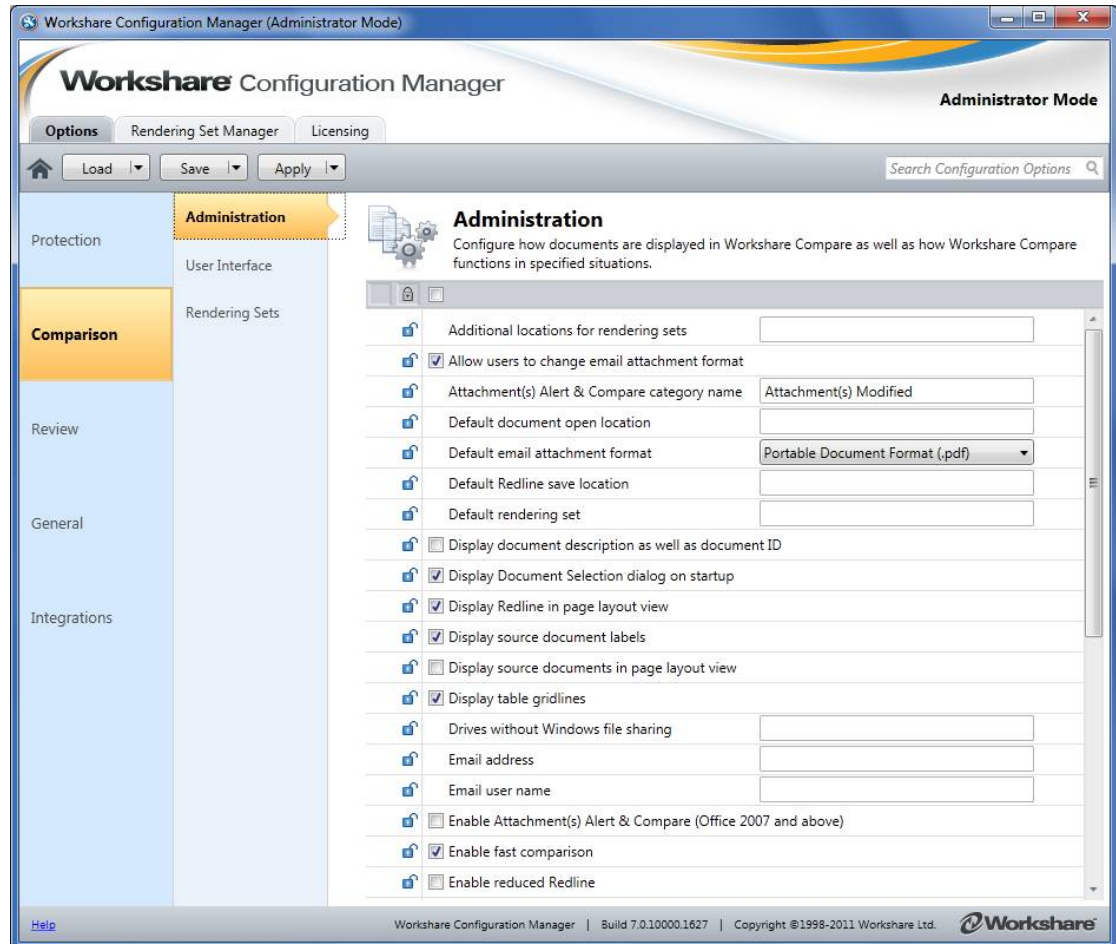


The Protection > Compress as Zip parameters are described in the following table:

Parameter	Description	Default
Zip attachments above specified limit (MB)	<p>The size limit for zipping attachments. If this option is not selected and the text box left blank, no zipping is done. If this option is selected and set to 0, attachments are always zipped (unless they are already zipped). You can also set the value in the text box to a particular size, for example, 2. In this case zipping only occurs if attachments are larger than 2MB.</p> <p>Workshare Protect zips Microsoft Word, Excel and PowerPoint files as well as PDF and RTF files. Each attachment that meets the specified limit is zipped individually and attached the email instead of the unzipped file.</p>	<p>Internal: Not selected</p> <p>External: Not selected</p>
Apply password when creating zip files	<p>If selected, users are prompted to enter a password whenever attachments are automatically zipped. This option is used in conjunction with the automatic zip options.</p> <p>When this setting is not selected, zip files are not password-protected.</p>	Not selected

Comparison > Administration

The **Comparison > Administration** parameters enable you to specify how Workshare Compare functions in specific situations.



The Comparison > Administration parameters are described in the following table:

Parameter	Description	Default
Additional locations for rendering sets	Workshare Compare looks in the following two locations to create a list of the possible rendering sets available: %PUBLIC%\Documents\Workshare\Rendering (public location) %USERPROFILE%\Documents\Workshare\Rendering (user location) To specify other locations, for example, on your network, enter the location in this field. Separate multiple locations with a semi-colon.	
Allow users to change email attachment format	Administrator Mode Only. If selected, the user can select from different formats for the Redline document when sending a Redline by email.	Selected

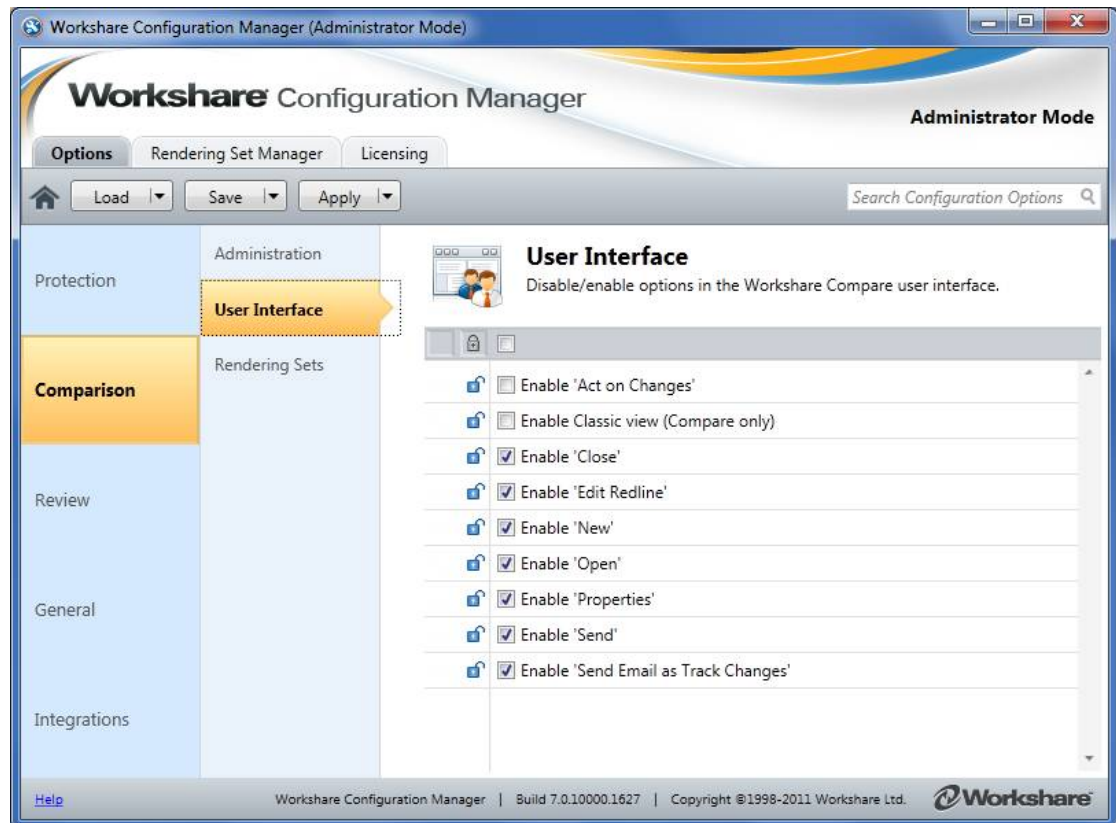
Parameter	Description	Default
Attachment(s) Alert & Compare category name	When the Alert & Compare functionality is enabled, the category name used in Microsoft Outlook to indicate that an email includes an attachment that has previously been sent out and that has now been modified.	Attachment(s) Modified
Default document open location	The default location when opening saved comparisons using the Open option in Workshare Compare.	
Default email attachment format	The default format for the Redline document when sending a Redline by email (DOC, DOCX, TEXT, RTF, HTM or PDF).	Portable Document Format (.pdf)
Default Redline save location	The default location where Redline documents are saved.	
Default rendering set	The default rendering set to be applied to comparisons. If no default is specified, Workshare Compare uses the most recently used rendering set as the default.	
Display document description as well as document ID	If selected, DMS document descriptions are displayed in the Workshare Compare comparison window, where usually it would display document IDs. A DMS document ID is in the form file://c/mydocument.doc , whereas the description is more user friendly, for example, mydocument.doc . This applies to local file store as well as all other DMS integrations. Additionally, if selected, the most recently used list displays the more user friendly document description when a user is picking recent documents in a Workshare Compare comparison.	Not selected
Display Document Selection dialog on startup	If selected, the <i>Compare Documents</i> dialog is displayed automatically when Workshare Compare is launched.	Selected
Display Redline in page layout view	If selected, the Redline document is displayed in Page Layout view.	Selected
Display source document labels	If selected, the names of the original and modified documents are displayed above them in the Source Documents window.	Selected
Display source documents in page layout view	If selected, the original and modified documents are displayed in Page Layout view in the Source Documents window.	Not selected
Display table gridlines	If selected, table gridlines are displayed in the Redline document and source documents.	Not selected
Drives without Windows file sharing	If you are running NFS Hummingbird to map drives, the drive letters to which to save Redline documents.	

Parameter	Description	Default
Email address	The user's email address as it appears in Workshare Compare.	
Email user name	The user's email user name as it appears in Workshare Compare.	
Enable Attachment(s) Alert & Compare (Office 2007 and above)	If selected, the Alert and Compare functionality is enabled. This means that when a user sends a document to a recipient and the recipient edits the document and sends it back to the user, Workshare Compare will automatically detect that the received attachment is a changed version of the original document and present the changes between the two documents. The Redline document as well as a summary of changes can be viewed directly in Microsoft Outlook or the user can open the Redline document from Microsoft Outlook directly into Workshare Compare.	Not selected
Enable fast comparison	If selected, Workshare Compare uses the faster binary method to compare documents. Fast comparison is the recommended comparison method. If you are experiencing issues with the document comparison, your Technical Support representative may request that you disable this option. Otherwise, it is not recommended to change this setting.	Selected
Enable reduced Redline	If selected, the Redline document displays changes with limited surrounding text.	Not selected
Highlight changes in Redline on navigation	If selected, the changes made to the original document are highlighted in the Redline document when you navigate to them. For example, by selecting a change in the Change Summary window..	Selected
Launch comparison in Workshare Compare	If selected, the Open in Compare checkbox in the Compare page of the Workshare Panel will be selected by default.	Not selected
Number of characters shown around a change in reduced Redline	When a reduced Redline document is produced, this setting defines the number of characters that are displayed surrounding a change. By default, the number of surrounding characters is 200; the minimum number of surrounding characters is 100.	200
Only print pages with changes	If selected, the Only print pages with changes checkbox in the <i>Print</i> dialog is selected by default. This option specifies that only the pages in Redline documents that include changes are printed.	Not selected
Print Redline in black and white	If selected, the Print Redline in black and white checkbox in the <i>Print</i> dialog is selected by default. This option specifies that Redline documents are printed in monochrome (black and white).	Not selected

Parameter	Description	Default
Prompt to save Redline after a comparison	If selected, the Redline document is automatically saved after each comparison.	Not selected
Prompt to save Redline on close	If selected, when closing Workshare Compare, a message is displayed prompting the user to save the Redline document.	Selected
Send Redline email body	The text included in the body of the email when sending a Redline by email.	The following files have been attached to this mail by Workshare Compare
Send Redline email subject	The text displayed in the Subject field when sending a Redline by email.	Workshare Compare Document Distribution
Show Hidden Text	If selected, hidden text is displayed in the Redline document.	Not selected
Synchronize documents on navigation	If selected, the views of the original, modified and Redline documents scroll to the same point when you click a paragraph in any of the documents.	Selected
Synchronize multiple Redlines on navigation	If selected, when an original document has been compared against multiple modified documents, then the views of each Redline document (in their individual tabs) scroll to the same approximate point when you click a paragraph in any of the Redline documents.	Selected
Use current instance of Word	If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from outside Microsoft Word use an existing winword.exe process.	Not selected
Use current instance of Word when comparing	If selected, then only one instance of Microsoft Word is invoked in memory and the Workshare functions that are launched from within Microsoft Word use an existing winword.exe process.	Not selected
Use Redline name as email subject	If selected, the document name of the Redline document is used in the Subject field when sending a Redline by email. This setting will override any setting specified in the Send Redline email subject parameter.	Not selected
Zoom (%)	The magnification of the source documents and the Redline document as they appear in the Workshare Compare main window.	100

Comparison > User Interface

The **Comparison > User Interface** parameters enable you to customize the Workshare Compare user interface and set what options will be available.



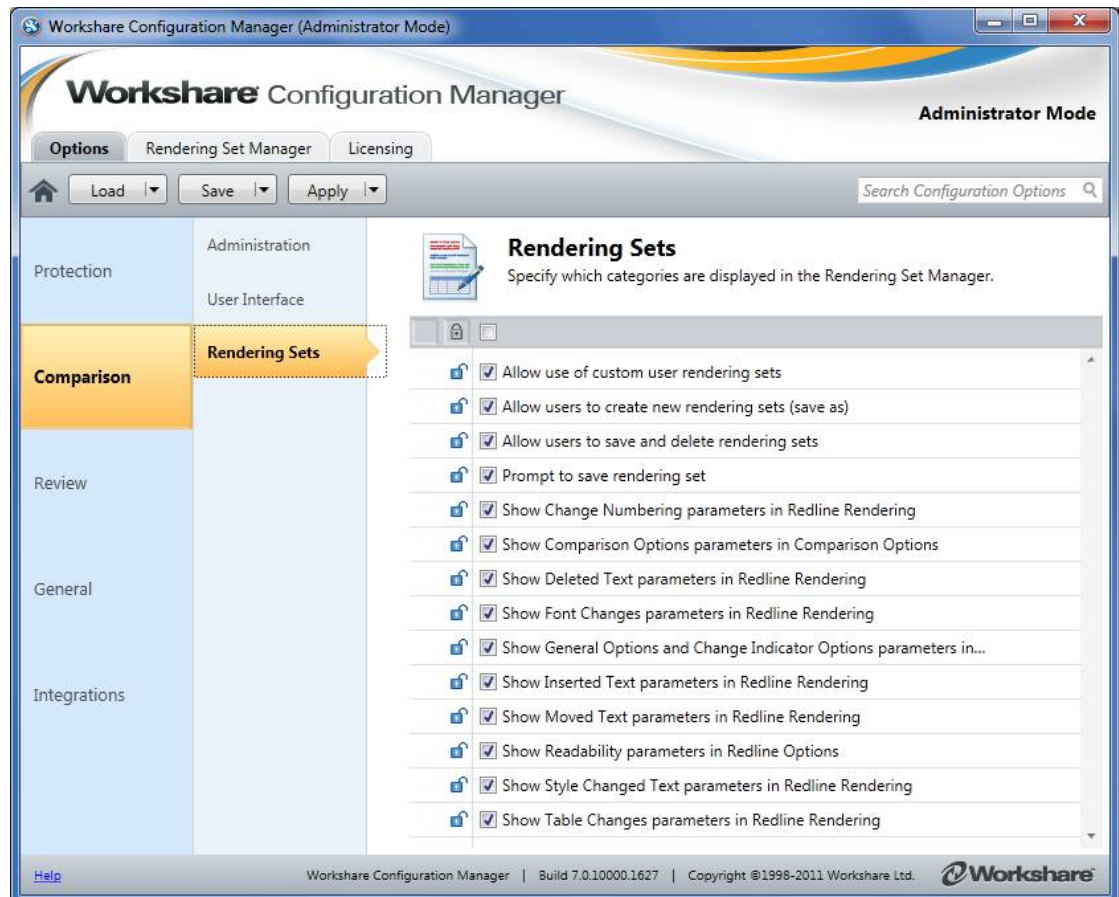
The Comparison > User Interface parameters are described in the following table:

Parameter	Description	Default
Enable 'Act on Changes'	If selected, the Act on Changes option is available. This option enables you to implement changes shown in the Redline document using track changes functionality.	Not selected
Enable Classic view (Compare only)	If selected, Workshare Compare adopts the Classic user interface as the default view. When not selected, the Workshare Compare application uses the Ribbon user interface as the default view. You can switch between interfaces by clicking Classic View in the View Ribbon or selecting Ribbon View from the <i>View</i> menu. Switching between views requires a restart of Workshare Compare.	Not selected
Enable 'Close'	If selected, enables the Close option in Workshare Compare. The user is able to close a Redline document.	Selected

Parameter	Description	Default
Enable 'Edit Redline'	<p>If selected, enables the Edit Redline option in Workshare Compare. The user is able to edit the Redline document in their chosen word processor. The word processor must be configured to open rich text format files (.rtf).</p> <p><i>Note: If the user does this, the Redline document is no longer an accurate reflection of the changes between the original and modified documents.</i></p>	Selected
Enable 'New'	If selected, enables the New option in Workshare Compare. The user is able to perform a new comparison.	Selected
Enable 'Open'	If selected, enables the Open option in Workshare Compare. The user is able to open a Redline document.	Selected
Enable 'Properties'	If selected, enables the Properties option in Workshare Compare. The user is able to access property information about the Redline document.	Selected
Enable 'Send'	If selected, enables the Send > Email option in Workshare Compare. The user is able to send a Redline document by email.	Selected
Enable 'Send Email as Track Changes'	If selected, enables the Send > Email as Track Changes option in Workshare Compare. The user is able to send the Redline document as an RTF document with the changes shown as track changes.	Selected

Comparison > Rendering Sets

The **Comparison > Rendering Sets** parameters enable you to configure the Workshare Compare rendering set functionality as well as set what rendering set options will be available.



The Comparison > Rendering Sets parameters are described in the following table:

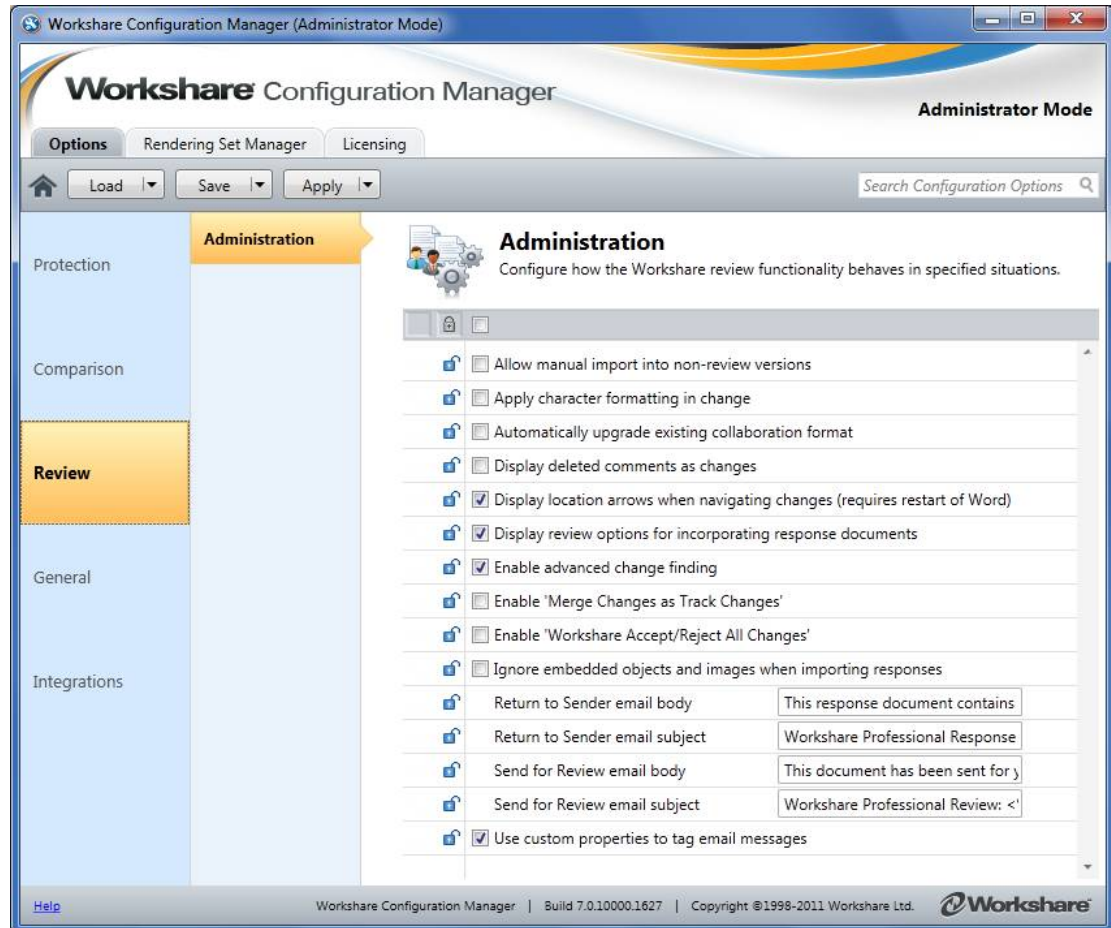
Parameter	Description	Default
Allow use of custom user rendering sets	Administrator Mode Only. If selected, Workshare Compare includes the rendering sets in the personal rendering sets location (C: Users > (user name) > My Documents > Workshare > Rendering) when populating the list of possible rendering sets available.	Selected
Allow users to create new rendering sets (save as)	Administrator Mode Only. If selected, the user can create new rendering sets using the Save As button in the Rendering Sets Manager.	Selected
Allow users to save and delete rendering sets	Administrator Mode Only. If selected, the user can save and delete rendering sets using the Save and Delete buttons in the Rendering Sets Manager.	Selected

Parameter	Description	Default
Prompt to save rendering set	If selected, when a user is creating their own rendering set, they are prompted to save their changes under a different name.	Selected
Show Change Numbering parameters in Redline Rendering	If selected, the Change Numbering parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to switch change numbering on and off in the Redline document and change how change numbering is displayed.	Selected
Show Comparison Options parameters in Comparison Options	If selected, the Comparison Options parameters in the Comparison Options category of the Rendering Set Manager are available to the user enabling the user to change the options used when comparing documents.	Selected
Show Deleted Text parameters in Redline Rendering	If selected, the Deleted Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how deleted text is displayed in the Redline document.	Selected
Show Font Changes parameters in Redline Rendering	If selected, the Font Changes parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how font changes are displayed in the Redline document.	Selected
Show General Options and Change Indicator Options parameters in Redline Options	If selected, the General Options and Change Indicator Options parameters in the Redline Options category of the Rendering Set Manager are available to the user enabling the user to change how the Redline document is displayed and what information is included with the Redline document.	Selected
Show Inserted Text parameters in Redline Rendering	If selected, the Inserted Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how inserted text appears in the Redline document.	Selected
Show Moved Text parameters in Redline Rendering	If selected, the Moved Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to change how moved text is displayed in the Redline document.	Selected
Show Readability parameters in Redline Options	If selected, the Readability parameters in the Redline Options category of the Rendering Set Manager are available to the user enabling the user to change readability options in the Redline document.	Selected

Parameter	Description	Default
Show Style Changed Text parameters in Redline Rendering	If selected, the Style Changed Text parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to determine how changes to styles are displayed in the Redline document.	Selected
Show Table Changes parameters in Redline Rendering	If selected, the Table Changes parameters in the Redline Rendering category of the Rendering Set Manager are available to the user enabling the user to set the options for how changes to table cells appear in the Redline document.	Selected

Review > Administration

The **Review > Administration** parameters enable you to specify how Workshare Professional functions in specific situations.



The Review > Administration parameters are described in the following table:

Parameter	Description	Default
Allow manual import into non-review versions	If selected, the user can manually import responses into a version of a document that has not been sent for review..	Not selected
Apply character formatting in change	If selected, when you apply a change the character formatting is also applied. This ensures that character formatting, such as bold, italics, subscript, superscript, font styles and sizes, is not lost when a change is applied.	Not selected

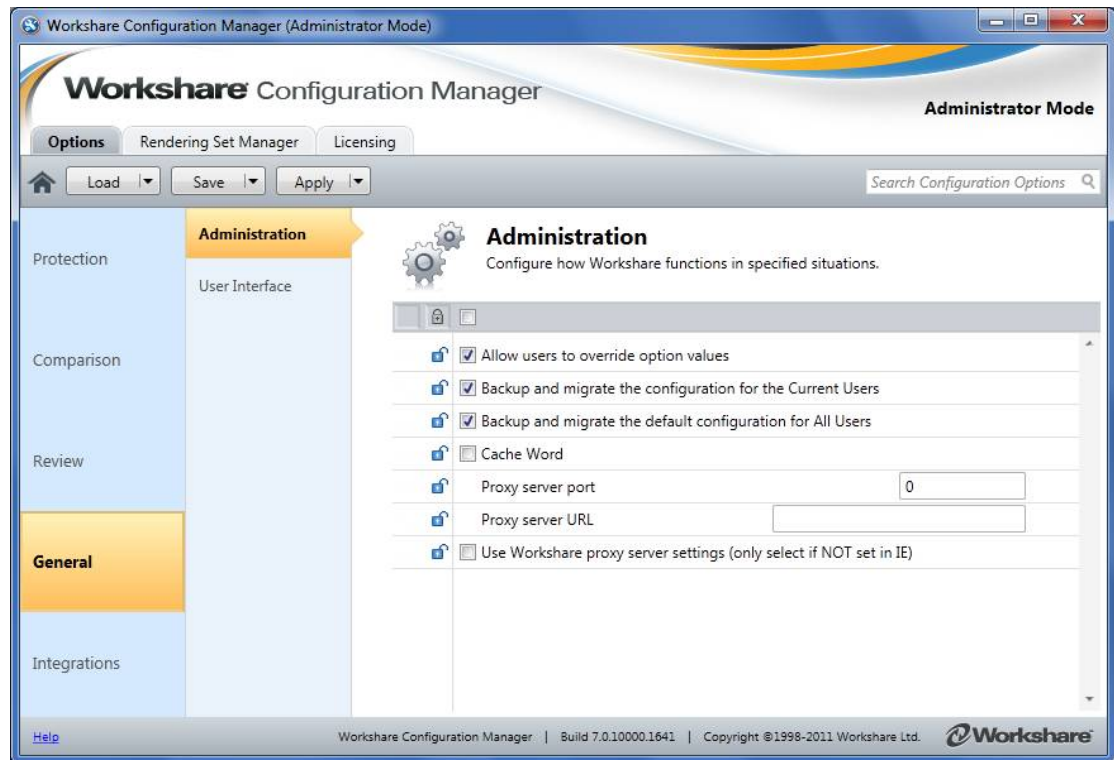
Parameter	Description	Default
Automatically upgrade existing collaboration format	<p>On versions of Workshare 3.1 SR2 and below, collaboration information (response files) were held in a different format to the way they are now held.</p> <p>If an old format response file is encountered in Workshare Professional, the user is asked if they want to convert it to the new format.</p> <p>If this option is selected, the conversion is done automatically without asking the user each time.</p>	Not selected
Display deleted comments as changes	<p>If selected, comments stripped out when a document is sent for review will be shown as changes when a response is later imported into the document.</p> <p>By default, this parameter is NOT selected and when importing a response Workshare Professional ignores comments deleted when the document was sent for review.</p> <div style="border: 1px solid #add8e6; padding: 5px; margin-top: 10px;"> <p><i>Note: If this option is changed, all previously imported responses will have the comments shown or hidden according to the value of this setting at the time of import.</i></p> </div>	Not selected
Display location arrows when navigating changes (requires restart of Word)	<p>If selected, an arrow is displayed from the change in the Workshare Panel to its location in the original document.</p>	Selected
Display review options for incorporating response documents	<p>If selected, the user is provided with three options of what they would like to do after double-clicking a response document attachment from an email. The user can open the modified document in Microsoft Word, compare the modified document with the original document using Workshare Compare or manage the proposed changes.</p> <p>When not selected, double-clicking a response document opens the modified document in Microsoft Word.</p>	Selected
Enable advanced change finding	<p>If selected, Workshare Professional's ability to locate changes is enhanced. Workshare Professional can locate changes in the evolving document even if other changes have been made to the surrounding content in the evolving document. For example, when a user has applied a change and also manually made changes to the text around the applied change. With this option selected, Workshare Professional may take longer to find changes (a progress bar is displayed) depending on the size of the collaboration document and the specifications of your PC.</p> <p>Additionally, when this option is selected, once Workshare Professional has found a change, it remembers the location and navigation back to the same change is much quicker.</p>	Selected

Parameter	Description	Default
Enable 'Merge Changes as Track Changes'	If selected, the user is provided with the option of importing all the changes from a response document into the original document using Microsoft Word's merge functionality. This option is displayed as Merge Changes as Track Changes in the <i>Actions</i> dropdown menu after a response document has been imported.	Not selected
Enable 'Workshare Accept/Reject All Changes'	If selected, the user is provided with the option of applying all the suggested changes to a document using Workshare's functionality. (Accept/Reject All Changes using Workshare in <i>Actions</i> dropdown menu.) By default, this parameter is NOT selected. Instead, users can either apply or reject each specific suggestion or select Merge Changes as Track Changes from the <i>Actions</i> menu.	Not selected
Ignore embedded objects and images when importing responses	If selected, embedded objects and images are removed when importing response documents.	Not selected
Return to Sender email body	The text included in the body of the email when returning a document to the sender.	This response document contains changes. Please double-click on the document to view changes and work with them using Workshare Professional.
Return to Sender email subject	The text displayed in the Subject field when returning a document to the sender.	Workshare Professional Response Document (Document Name)

Parameter	Description	Default
Send for Review email body	<p>The text included in the body of the email when sending a document for review. You can include the document name/ID/version by using the following variables:</p> <p><%DocName%>: document name <%DocNameWithoutVersion%>: document name without version <%DocVersionLabel%>: document version label <%DocID%>: document ID</p>	<p>This document has been sent for your review using Workshare Professional. Please double-click on the document to edit it in Microsoft Word and then email back to the sender.</p>
Send for Review email subject	<p>The text displayed in the Subject field when sending a document for review. You can include the document name/ID/version by using the following variables:</p> <p><%DocName%>: document name <%DocNameWithoutVersion%>: document name without version <%DocVersionLabel%>: document version label <%DocID%>: document ID</p>	<p>Workshare Professional Review (Document Name)</p>
Use custom properties to tag email messages	<p>If selected, Workshare tags a document using the custom properties of the document. Each email client needs to be informed that an email came from Workshare. In order to do this, Workshare suppresses the Microsoft Outlook dialog and tags each document (once it has been cleaned, etc.) so that the document has the ability to be intelligently imported.</p> <p>This setting should be selected unless it conflicts with third party software.</p>	<p>Selected</p>

General > Administration

The **General > Administration** parameters enable you to specify how Workshare functions in specific situations.



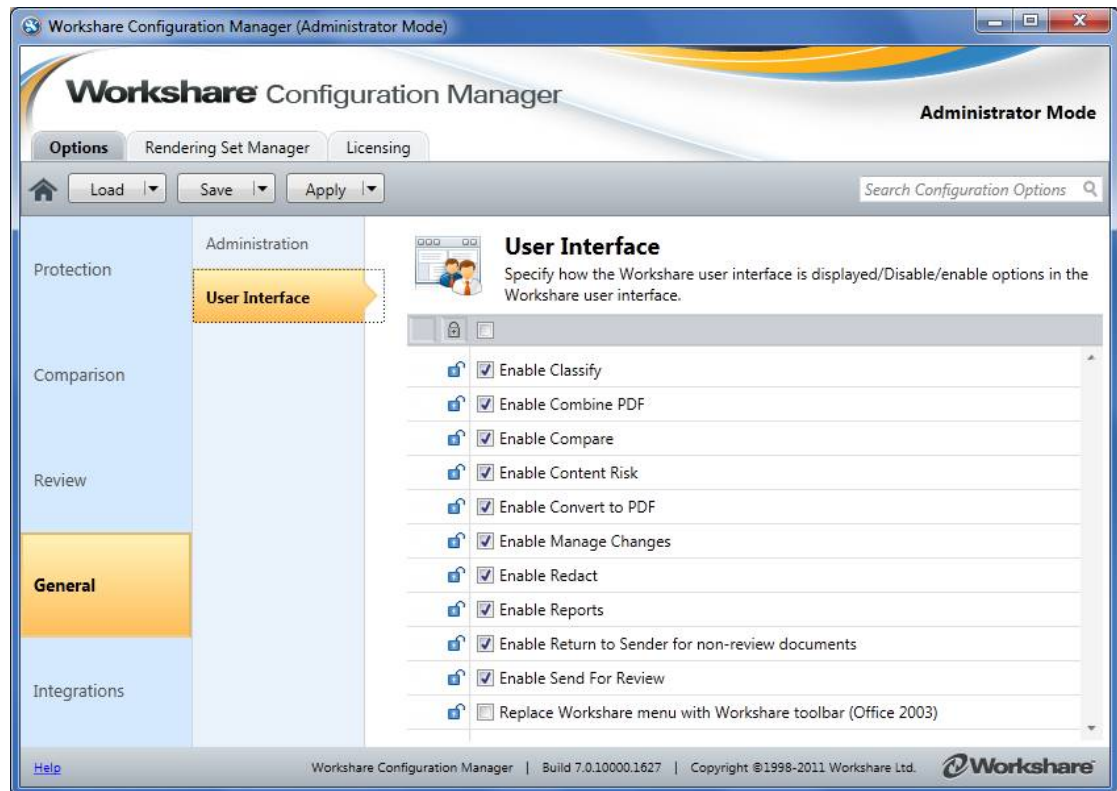
The General > Administration parameters are described in the following table:

Parameter	Description	Default
Allow users to override option values	Administrator Mode Only. If selected, users can override the values for parameters in the Workshare Configuration Manager unless individual parameters have been locked.	Selected
Backup and migrate the configuration for the Current Users	If selected, when you are upgrading from an earlier version of Workshare all existing user settings and options are transferred to the Workshare 7 installation.	Selected
Backup and migrate the default configuration for All Users	Administrator Mode Only. If selected, when you are upgrading from an earlier version of Workshare all existing public settings and options are transferred to the Workshare 7 installation.	Selected

Parameter	Description	Default
Cache Word	<p>If selected, an instance of Microsoft Word is kept in memory when Workshare is in use. This can save time when performing certain operations. If not selected, an instance of Microsoft Word is started and stopped on demand.</p> <p><i>Note: When Microsoft Word starts up invisibly (when Cache Word is selected), it does not initialize its add-ins. If the user then does something to make the instance of Microsoft Word visible (for example, initiates editing a document) then the user will be working with no add-ins initialized.</i></p>	Not selected
Proxy server port	The port of an Internet proxy server (if used).	0
Proxy server URL	The URL of an Internet proxy server (if used).	
Use Workshare proxy server settings (only select if NOT set in IE)	If selected, enables the use of an Internet proxy server to connect to the Workshare Licensing Authorization Server.	Not selected

General > User Interface

The **General > User Interface** parameters enable you to customize the Workshare user interface and set what options will be available in the Workshare Panel and Workshare Ribbon/menu.



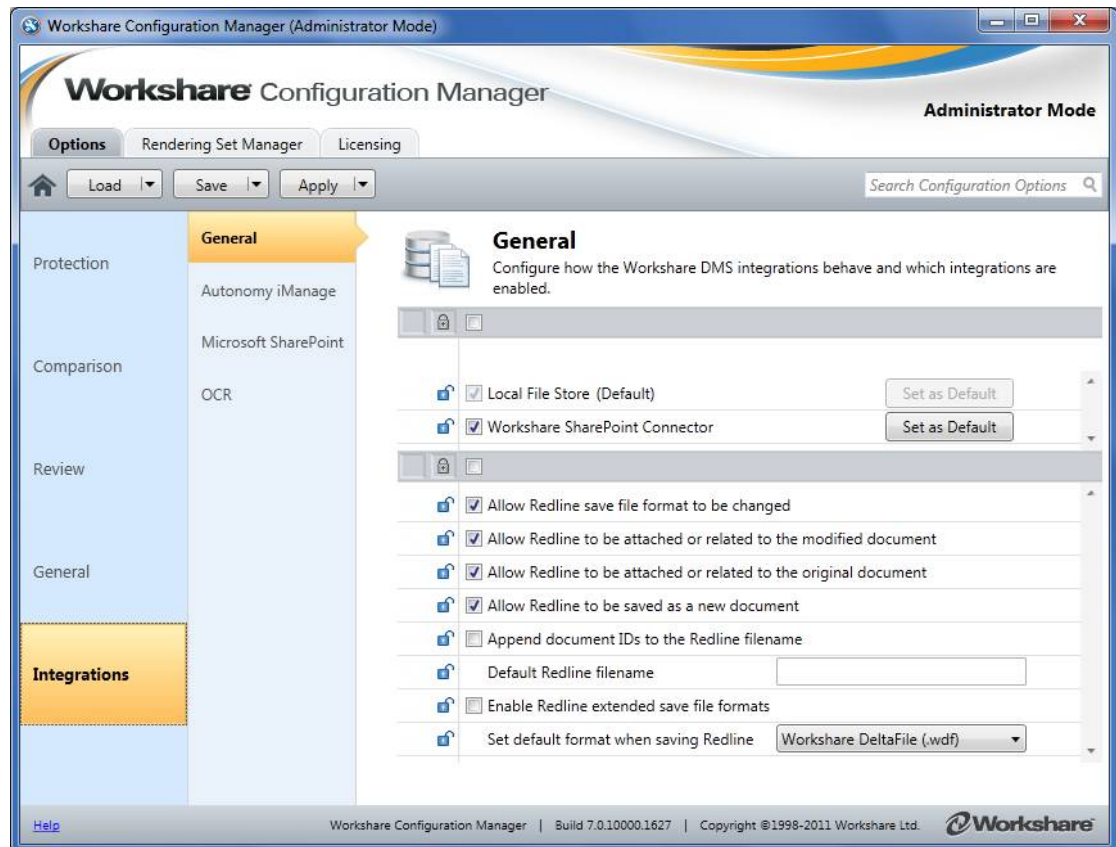
The General > User Interface parameters are described in the following table:

Parameter	Description	Default
Enable Classify	If selected, the Classify option is enabled in the Workshare menu/Workshare tab and the Classify option is displayed in the Workshare Panel.	Selected
Enable Combine PDF	If selected, the Combine PDF option is enabled in the Workshare menu/Workshare tab.	Selected
Enable Compare	If selected, the Compare Versions option is enabled in the Workshare menu/Workshare tab and the Compare option is displayed in the Workshare Panel.	Selected
Enable Content Risk	If selected, the Content Risk option is enabled in the Workshare menu/Workshare tab and the Content Risk option is displayed in the Workshare Panel.	Selected
Enable Convert to PDF	If selected, the PDF option is enabled in the Workshare menu/Workshare tab and the PDF option is displayed in the Workshare Panel.	Selected

Parameter	Description	Default
Enable Manage Changes	If selected, the Manage Changes option is enabled in the Workshare menu/Workshare tab and the Manage Changes option is displayed in the Workshare Panel.	Selected
Enable Redact	If selected, the Redact option is enabled in the Workshare toolbar/Workshare tab.	Selected
Enable Reports	If selected, the Reports option is enabled in the Workshare menu/Workshare tab.	Selected
Enable Return to Sender for non-review documents	If selected, whenever you send a document by email (not using the send for review options), the review copy panel is still displayed in the document and the recipient can see the return to sender options.	Selected
Enable Send for Review	If selected, the Send Draft For Review option is enabled in the Workshare menu/Workshare tab and the Send option is displayed in the Workshare Panel.	Selected
Replace Workshare menu with Workshare toolbar (Office 2003)	Microsoft Office 2003/XP only. If selected, the Workshare menu is removed and the items that appear in the menu are replaced with toolbar icons.	Not selected

Integrations > General

The **Integrations > General** category is where you select the default document provider with which Workshare integrates as well as set parameters general to all DMS integrations.



In the top section of the right pane, you can see the document providers with which Workshare integrates. **Local File Store** is always available and **Workshare SharePoint Connector**, **Interwoven 8** (Autonomy iManage) and **OpenText** are available if you have the relevant Workshare integration installed and your Workshare license includes the relevant integration.

You specify the default document source by clicking the **Set as Default** button to the right of the required document provider.

The **Integrations > General** parameters are described in the following table:

Parameter	Description	Default
Allow Redline save file format to be changed	If selected, the file format can be changed when saving the Redline document.	Selected

Parameter	Description	Default
Allow Redline to be attached or related to the modified document	If selected and when using Hummingbird, the Redline document can be saved as an attachment to the modified document. When using Autonomy iManage, the Redline document can be saved as a related document to the modified document.	Selected
Allow Redline to be attached or related to the original document	If selected and when using Hummingbird, the Redline document can be saved as an attachment to the original document. When using Autonomy iManage, the Redline document can be saved as a related document to the original document.	Selected
Allow Redline to be saved as a new document	If selected, the Redline document can be saved as a new document.	Selected
Append document IDs to the Redline filename	If selected, the document ID or number is used as the default name for a Redline document when it is saved.	Not selected
Default Redline filename	The default name for a Redline document when it is saved.	
Enable Redline extended save file formats	If selected, the user can choose a file format that is support by Microsoft Word when saving Redline documents.	Not selected
Set default format when saving Redline	The default format for the Redline document when saving a Redline (WDF, RTF, DOC, DOCX, TEXT or PDF).	Workshare DeltaFile (.wdf)

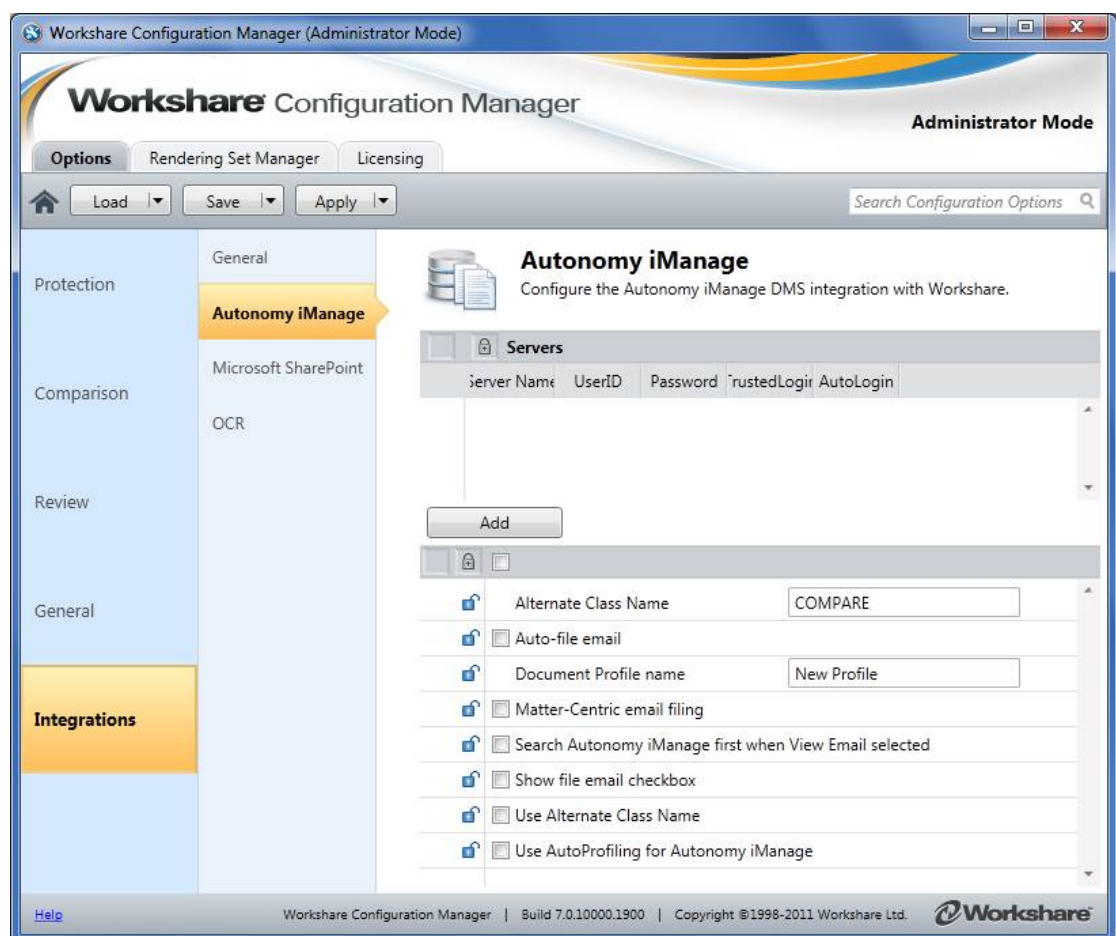
Integrations > Autonomy iManage

The **Integrations > Autonomy iManage** category is where you can add details of your Autonomy iManage server as well as set specific parameters determining how Workshare interacts with Autonomy iManage.

In User Mode, the **Integrations > Autonomy iManage** category is available for Autonomy iManage license holders only.

Note: In order for this category to be available, you must ensure your Workshare license includes the Autonomy iManage integration.

In Administrator Mode, the **Integrations > Autonomy iManage** category is always available.



The list of configured Autonomy iManage servers is displayed in the **Servers** section of the right pane. You can add an Autonomy iManage server as required.

To add an Autonomy iManage server:

1. In the **Integrations > Autonomy iManage** category, click **Add**. An entry is added to the list of Autonomy iManage servers in the **Servers** section.

Server Name	UserID	Password	TrustedLogin	AutoLogin	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Test Remove

2. In the **Server Name** field, enter the name of your Autonomy iManage server.
3. 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.
4. 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.

5. 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.

The **Integrations > Autonomy iManage** parameters are described in the following table:

Parameter	Description	Default
Alternate Class Name	If the Use Alternate Class Name parameter is selected, the class name to use. This class MUST exist on your iManage server	COMPARE
Auto-file email	If selected, the File Email on Send checkbox in the Send Draft for Review page is selected by default so the email generated when sending a document for review will be filed in the appropriate Matter workspace.	Not selected
Document Profile name	When automatically profiling documents, the document profile name to use.	New Profile
Matter-Centric email filing	If selected, matter-centric email filing is enabled in Workshare Professional.	Not selected
Search Autonomy iManage first when View Email selected	If selected, when users select View Email from the Actions menu on the Manage Changes page, Workshare Professional first searches for the email in iManage and then in Exchange. If this checkbox is not selected, Workshare Professional first searches for the email in Exchange and then in iManage.	Not selected

Parameter	Description	Default
Show file email checkbox	If selected, iManage users will have a File Email on Send checkbox in the Send Draft for Review page from where they can select to file the email generated when sending a document for review in the appropriate Matter workspace.	Not selected
Use Alternate Class Name	If selected, the alternative class name (specified in the Alternate Class Name parameter) is used in the profiling when saving Redline documents (comparisons).	Not selected
Use AutoProfiling for Autonomy iManage	If selected, automatic profiling is performed when adding documents to the iManage database.	Not selected

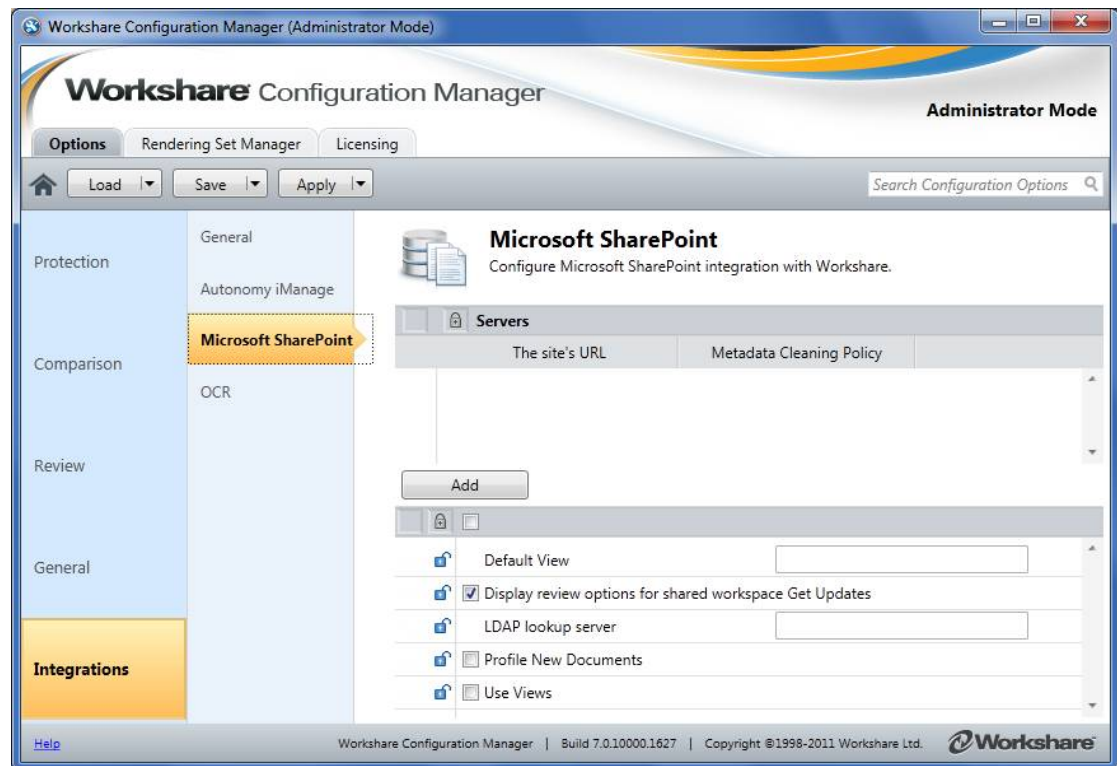
Integrations > Microsoft SharePoint

The **Integrations > Microsoft SharePoint** category is where you can add SharePoint sites configured on your SharePoint server details as well as set specific parameters determining how Workshare interacts with Microsoft SharePoint.

In User Mode, the **Integrations > Microsoft SharePoint** category is available for SharePoint license holders only.

***Note:** In order for this category to be available, you must ensure your Workshare license includes the SharePoint integration.*

In Administrator Mode, the **Integrations > Microsoft SharePoint** category is always available.



The list of specified SharePoint sites is displayed in the **Servers** section of the right pane. You can add new SharePoint sites configured on your SharePoint server as required.

To add a SharePoint site:

1. In the **Integrations > Microsoft SharePoint** category, click **Add**. An entry is added to the list of SharePoint sites in the **Servers** section.

Servers	
The site's URL	Metadata Cleaning Policy
<input type="text"/>	Internal Cleaning Policy <input type="button" value="Test"/> <input type="button" value="Remove"/>

2. In the text box, enter the complete URL for the SharePoint site location.
3. 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.
4. Click **Test** to confirm connection to the specified site.

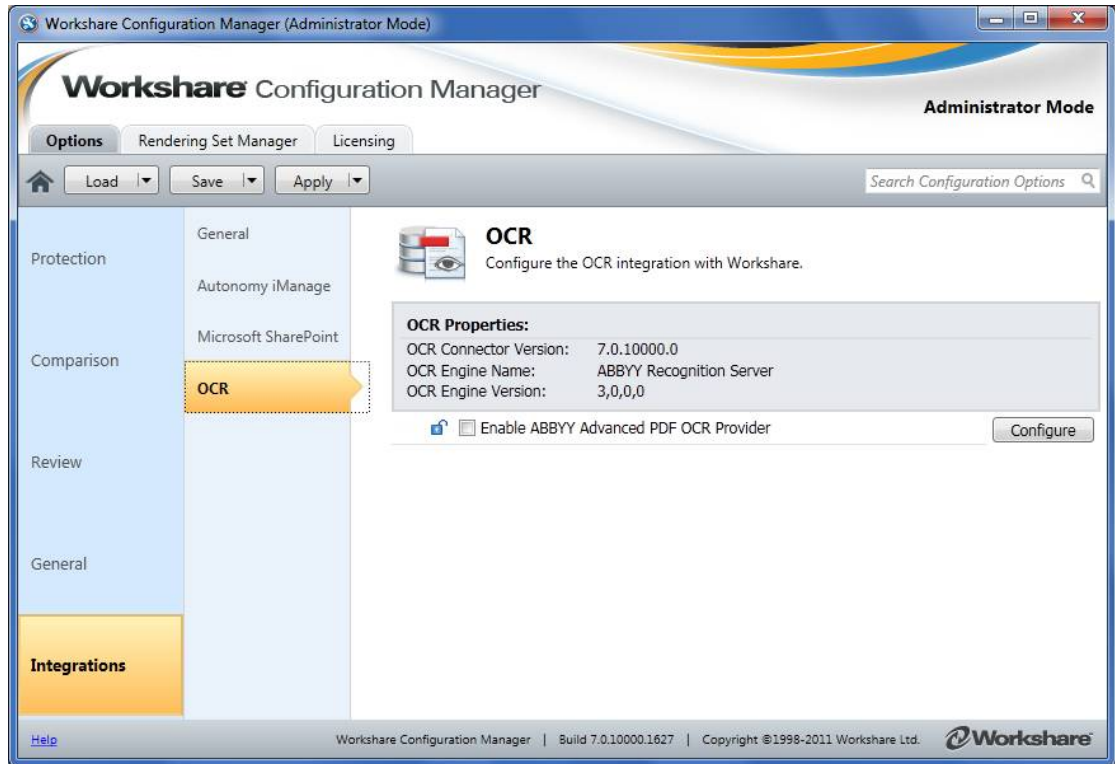
To delete a site from the list, click **Remove** to the right of the site details.

The **Integrations > Microsoft SharePoint** parameters are described in the following table:

Parameter	Description	Default
Default View	The default view selected in the list of Use Views.	
Display review options for shared workspace Get Updates	<p>If selected, the <i>Review Options</i> dialog is displayed when you click Get updates from SharePoint in the Manage Changes page. This dialog enables you to open a shared Workspace document or import the shared Workspace document and manage changes.</p> <p>If not selected, then clicking Get updates... will import the shared Workspace document.</p>	Selected
LDAP lookup server	<p>The LDAP server:port (for example, NY1LDAP1:390). 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:</p> <ul style="list-style-type: none"> • 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. 	
Profile New Documents	<p>If selected, when a document is saved into SharePoint, a form is displayed to collect document metadata.</p> <div style="border: 1px solid #add8e6; padding: 5px; margin-top: 10px;"> <p>Note: To enable this profiling feature, the SharePoint site must have custom content types set up.</p> </div>	Not selected
Use Views	If selected, a dropdown list of the views available in a SharePoint document library is displayed in the top right of the SharePoint browser window. This acts as a filter for the files displayed by the browser.	Not selected

Integrations > OCR

The **Integrations > OCR** category is where you can enable and configure the Workshare OCR Server.



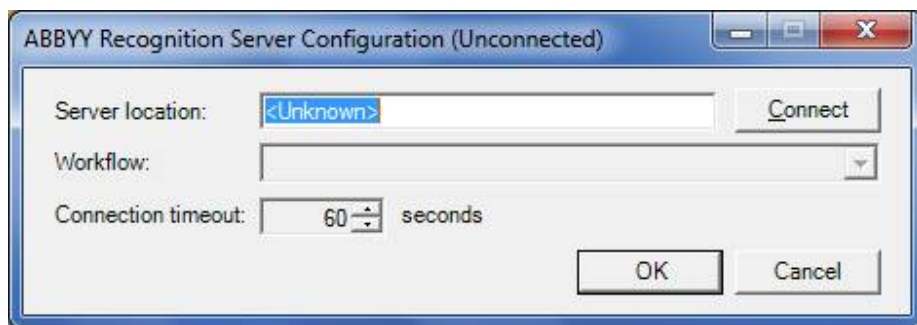
The **OCR Properties** area shows version details of the Workshare OCR Connector.

The **Integrations > OCR** parameter is described in the following table:

Parameter	Description	Default
Enable ABBYY Advanced PDF OCR Provider	If selected, Workshare Compare will use the Workshare OCR Server for OCR prior to comparing a PDF. You must also specify your Workshare OCR Server details (using the Configure button).	Not selected

To configure a Workshare OCR Server:

1. In the Integrations > OCR category, click **Configure**.



1. In the **Server location** field, specify the name of the server where you installed the Workshare OCR Server and click **Connect**. If a connection with the server is established "Connected" is displayed in the title bar of the dialog.
2. From the **Workflow** dropdown list, select the workflow that is configured on the server.
3. In the **Connection timeout** field, select the number of seconds Workshare Compare will wait for OCR to be performed by the server and an RTF to be returned.
4. Click **OK**.