

Workshare Professional 10

Getting Started Guide



Introducing Workshare Professional 10

Workshare Professional 10 helps professionals compare, protect and share their documents.

New features

- **Compare Excel spreadsheets:** Compare any two Excel spreadsheets and see exactly what's changed. See the differences between individual sheets or your entire workbook. (page 4)
- **More ways to start a comparison in Outlook:** New buttons and drop-down options right where you want them. Compare two email attachments or even a snippet of text from the body of your email. (page 8)

105				
121	145	128		
87	95	97	105	
97	78	104	95	491
200	200	200	220	1020
140	118	125	125	626
695 895	632 832	648 848	715 935	3356 4376
1651 1451	1354 1154	1641 1441	1750 1530	7450 6430
8286 7686	9640 8840	11281 10281	13031 11811	13031 11811

Classic features

- **Compare Word documents, PDFs, PowerPoint presentations and text snippets:** Fast, accurate comparison for Word/Word, PDF/PDF, Word/PDF, PowerPoint/PowerPoint. And with Selective Compare, you can copy text from anywhere, like a document or an email, and run a comparison. (pages 3-8)
- **Clean email attachments and files on your computer:** Remove sensitive metadata from your documents before they're shared, from wherever you're working (like Outlook, Word, PowerPoint or Excel. You can also select multiple files or folders on your computer and remove metadata from them all at the same time (pages 9-12)
- **Securely store, share and collaborate on files:** Use Workshare's secure online file sharing and collaboration platform to work on your files, wherever you are. (pages 13-15)

 The automatic change notification (ACN) feature has been removed.



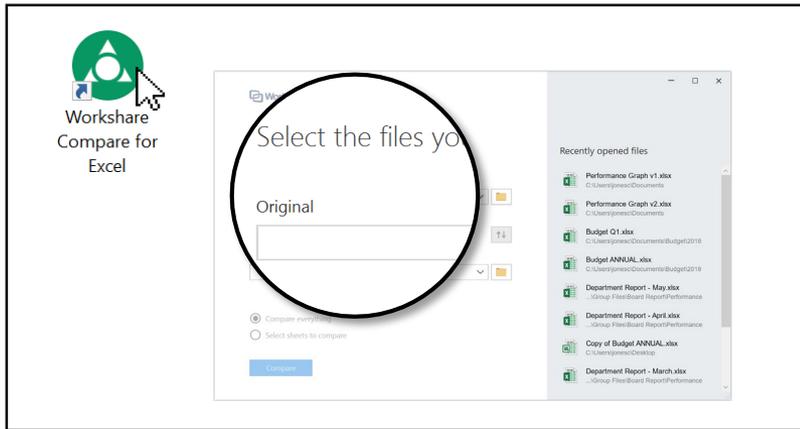
Compare

- Compare Excel spreadsheets
- Compare Word documents & PDFs
- Compare PowerPoint presentations
- Compare text snippets
- Ways to start a comparison

Compare Excel spreadsheets

See what's changed between two workbooks or worksheets, from the high-level view to the details of any cell.

1 Run the comparison



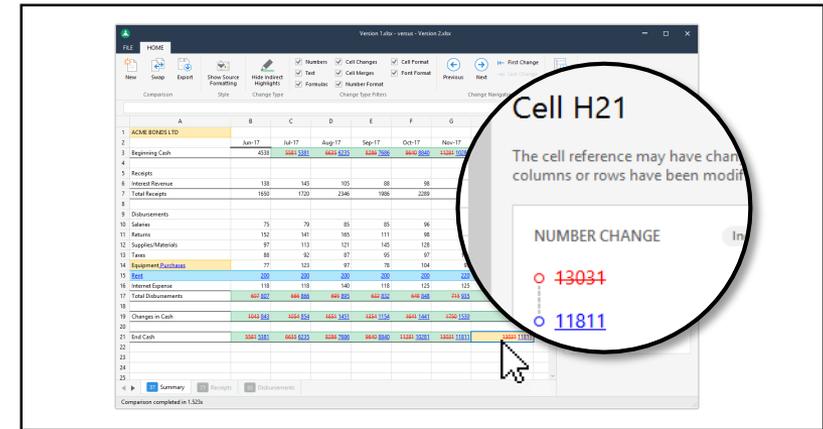
First, double-click the **Workshare Compare for Excel** icon. The file selection dialog opens.

Choose two Excel workbooks to compare. Click  next to the **Original** field and locate the first file. Do the same for the **Modified** field. You can also drag files from **Recently opened files**.

To compare the whole workbooks, leave **Compare everything** selected. To compare a single worksheets, click **Select sheets to compare** and choose the worksheets.

Click **Compare**. The comparison is opened.

2 View the changes



Changes are highlighted different colors so you can quickly see what's happened (inserted cells are **green**; deleted cells are **red**; direct changes are **yellow**; indirect changes are **blue**).

Click any cell to see all changes that happened in that cell.

Use the Change Type Filters in the Home ribbon to see only some kinds of changes (numbers, text, formulas, etc).

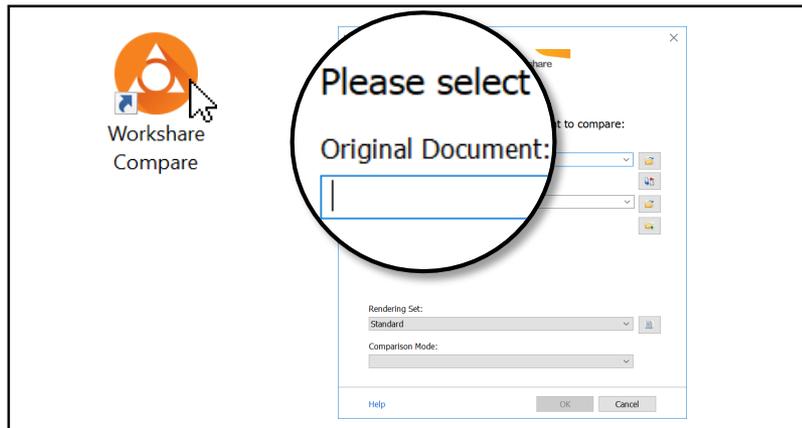
By default, source formatting (cell color, font style, etc) is turned off to make the comparison easier to read. To view the source formatting, click **Show Source Formatting** in the Home ribbon.

 A direct change is a change made by a user (e.g. someone updated a formula). An indirect change is a change made by Excel (e.g. a new row was added above, which caused the cell's value to be updated).

Compare Word documents & PDFs

Use the Compare application to compare two Word documents, two PDFs or a Word document and a PDF.

1 Run the comparison



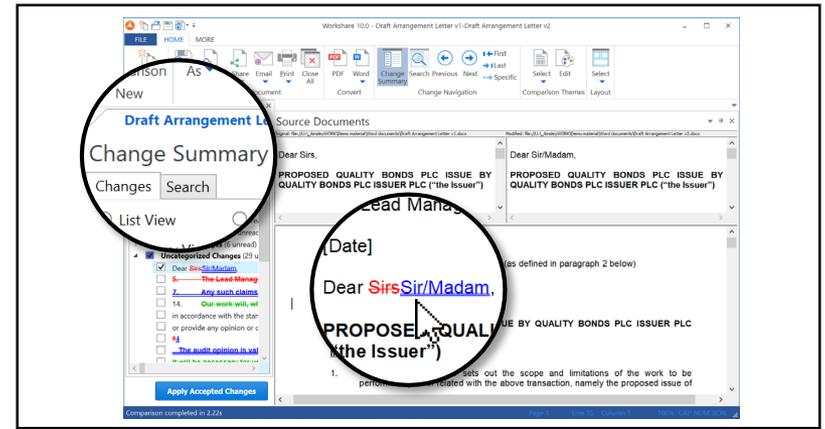
First, double-click the **Workshare Compare** icon. The document selection dialog opens.

Choose Word documents or PDF files to compare. Click  next to the **Original Document** field and locate the first file. Do the same for the **Modified Document** field.

If you know the file names and locations, you can also type them directly into the **Original Document** and **Modified Document** fields.

Click **OK**. The comparison is opened.

2 View the changes



The Change Summary is on the left. It lists and categorizes every change so it's easy to locate the changes that matter to you. Click any change to see it in context in the document.

The comparison document (a.k.a the redline) is displayed on the right. Added text is **blue with a double underline**. Deleted text is **red with a strikethrough**. Moved text is green, displaying a **strikethrough** to indicate where it was originally located and a **double underline** to indicate where it was moved to.

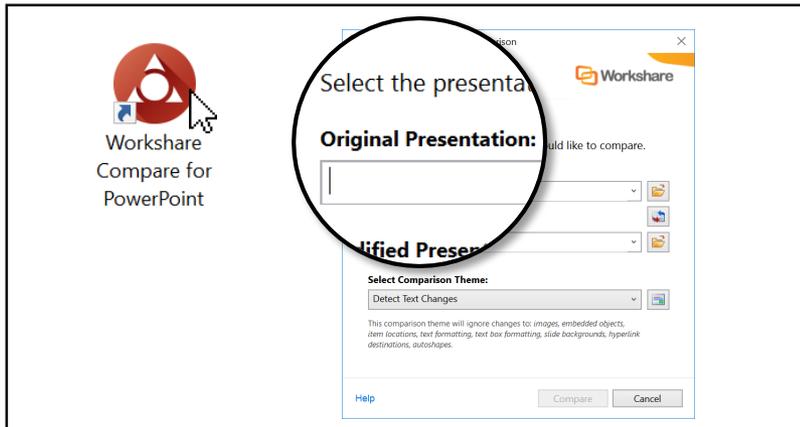
If you're comparing two Word documents, you can select changes from the Change Summary, then click **Apply Accepted changes**. A new Word document is opened with the changes accepted.

 If the changes you were expecting to be **added** are displayed as **deleted** and vice versa, it's because your **Original** and **Modified** documents should be swapped. To swap them, click the **Swap** button in the More ribbon of the Compare application.

Compare PowerPoint presentations

You can compare any two PowerPoint presentations and see the results side by side.

1 Run the comparison



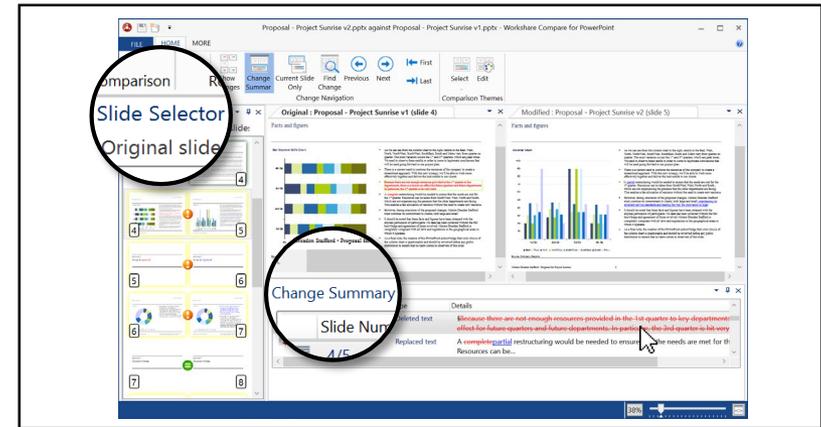
First, double-click the **Workshare Compare for PowerPoint** icon. The file selection dialog opens.

Choose two PowerPoint presentations to compare. Click  next to the **Original Presentation** field and locate the first presentation. Do the same for the **Modified Presentation** field.

If you know the file names and locations, you can also type them directly into the **Original Presentation** and **Modified Presentation** fields.

Click **Compare**. The comparison is opened.

2 View the changes



The **Slide Selector** is on the left. It gives you a high-level view of the differences, and it enables you to jump to any slide pair in the Slide View so you can see the changes in detail.

The **Slide View** is on the right. It displays a larger view of the original and modified presentations with any changes clearly indicated. Here, you can scroll through the two presentations and see changes in context.

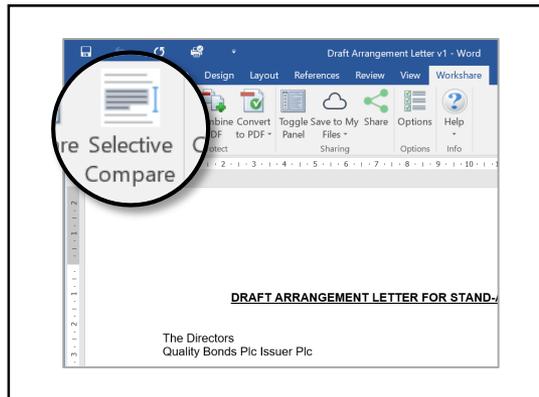
The **Change Summary** sits below the original and modified presentations. It provides a list of all changes. Select any change from the Change Summary to see it in context in the Slide View.

 Want to filter out noise? Click **Show Changes** in the Home tab of the Compare for PowerPoint application to see only the slides that have changed.

Compare text snippets

See the changes between snippets of text or compare two versions of a table without the need to redline an entire file.

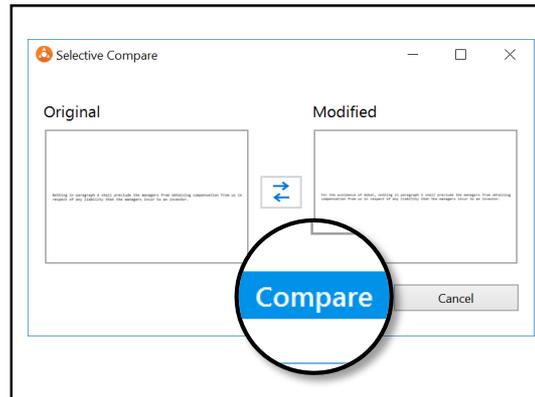
1 Open Selective Compare



Open Word and click the **Selective Compare** button in the **Workshare** ribbon.

The Selective Compare dialog is opened.

2 Run the comparison



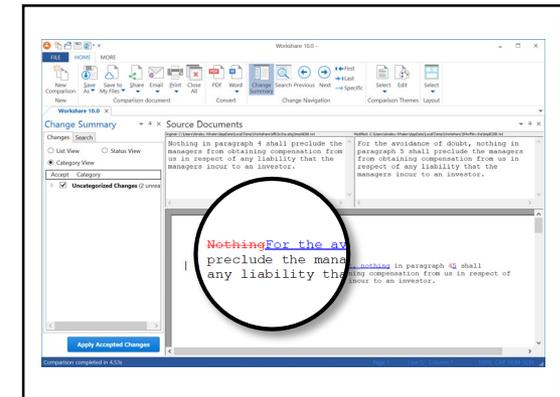
Copy the first text snippet (**Ctrl-C**). You can copy it from anywhere, even another file or an email.

In the Selective Compare dialog, click inside the **Original** field. The text is pasted there.

Copy the second text snippet, then click inside the **Modified** field to paste it.

Click **Compare**. The comparison is opened.

3 View the changes



The comparison is displayed on the right, and the Change Summary is displayed on the left.

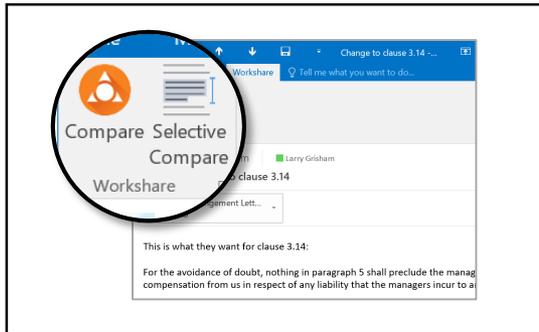
To apply changes, select them from the Change Summary, then click **Apply Accepted Changes**. A new Word document is opened with the changes accepted.

Ways to start a comparison

So far this guide's covered how to start file comparisons from Workshare's applications and how to start text snippet comparisons by clicking the **Selective Compare** button in Word.

You can also start comparisons from Outlook, Word or PowerPoint as well as your desktop or DMS. When you do, the right comparison application opens automatically. All ways work equally well, so choose whichever's easiest for you.

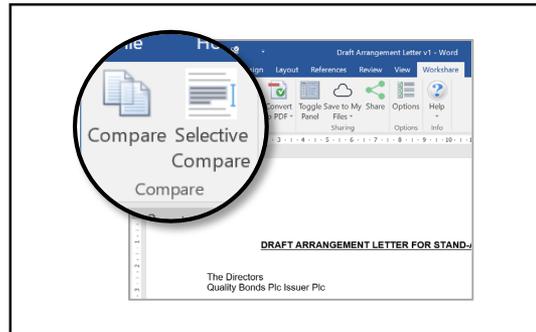
a Outlook



Email attachments: Open any email with one or more Excel, Word, PDF or PowerPoint files attached. Click **Compare** in the Workshare ribbon to start the comparison. If there are several email attachments, you'll be asked which ones to compare.

Text snippets: Open any email and click **Selective Compare** in the Workshare ribbon. The Selective Compare dialog opens and you can add text snippets to compare.

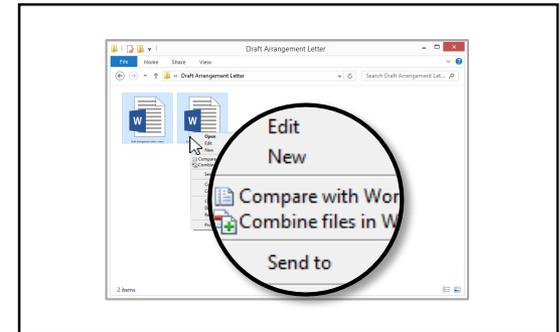
b Word or PowerPoint



Word documents: Open any document in Word. Click **Compare** in the Workshare ribbon. You're prompted to choose a second file to compare it against.

PowerPoint presentations: Open any presentation in PowerPoint. Click **Compare** in the Workshare ribbon. You're prompted to choose a second file to compare it against.

c Your desktop or DMS



Files on your desktop: Right-click Excel, Word, PDF or PowerPoint files and select **Compare with Workshare** to launch the comparison.

Files in your DMS: Open any of Workshare's comparison applications and browse to files in your DMS.



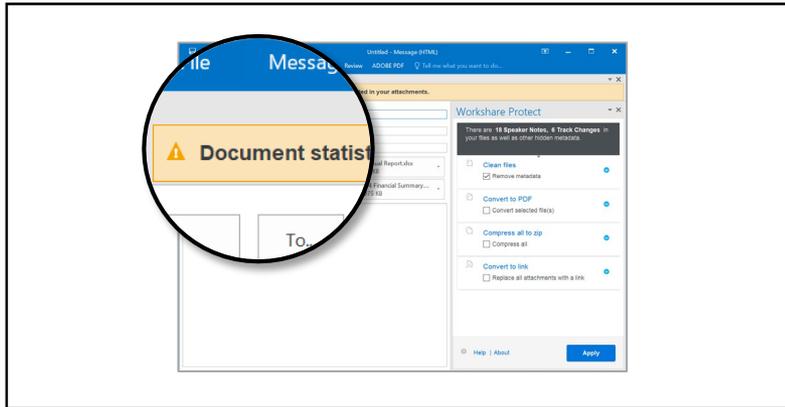
Protect

- Clean and secure email attachments
- Clean files open in Word, PowerPoint or Excel
- Batch clean files or folders on your computer

Clean and secure email attachments

Clean documents of sensitive metadata and apply additional security options before they're shared.

1 Attach files to an email

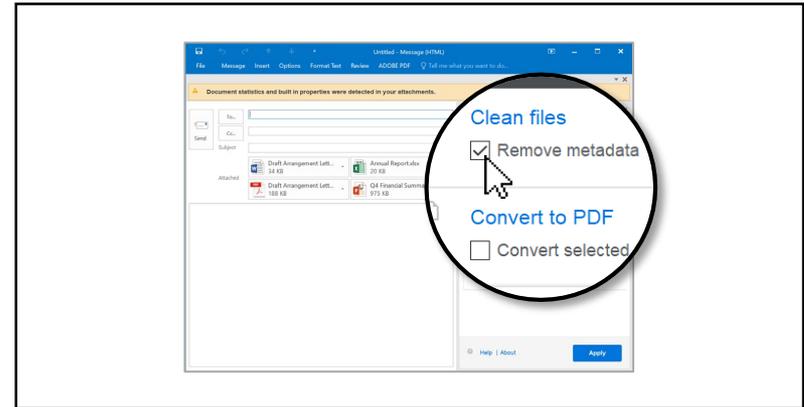


When you add attachments to an email, Workshare automatically scans the files for potentially sensitive data and alerts you to what's been found.

For example, track changes, comments and document properties could contain sensitive information that might put your company's reputation at stake if shared inadvertently.

After Workshare has completed the scan, the Interactive Protect panel opens, providing you with the option to remove any or all metadata as well as apply additional security options (like converting the files to password protected PDFs).

2 Apply your security options



Select an option to apply it to all attachments. Or, expand it and choose settings to apply to individual attachments.

Clean files: Remove potentially sensitive metadata.

Convert to PDF: Convert attachments to PDF or PDF/A. Optionally, add a password.

Compress all to zip: Put the attachments in a ZIP folder. Optionally, add a password.

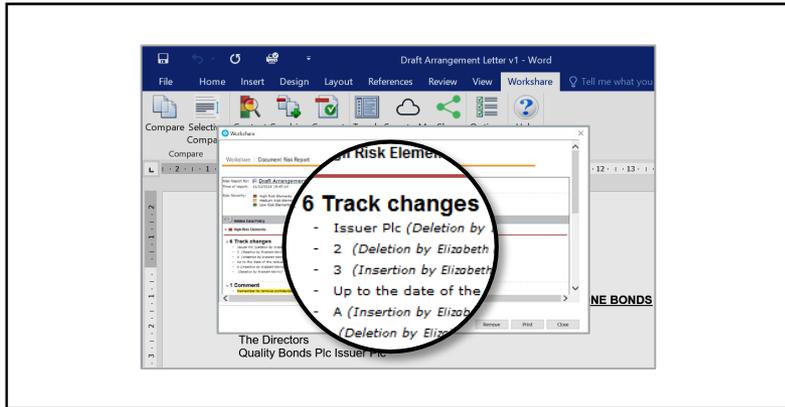
Convert to link: Save attachments to a folder in Workshare Connect, which is accessible online. A link to the folder is added to the body of your email.

Click **Apply**, then send your email as normal.

Clean files open in Word, PowerPoint or Excel

You can clean Word documents, PowerPoint spreadsheets and Excel files right from their native applications.

1 Scan the file for metadata



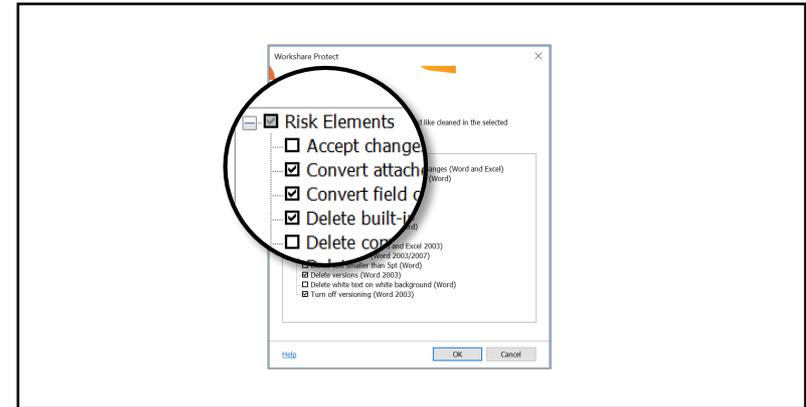
Open a file in Word, PowerPoint or Excel.

Select the Workshare ribbon and click **Content Risk**.

Your file is scanned for metadata and the Document Risk Report is displayed.

The Document Risk Report shows you all the metadata found in your file.

2 Remove metadata



Click **Remove** in the Document Risk Report. The Advanced Options dialog is displayed.

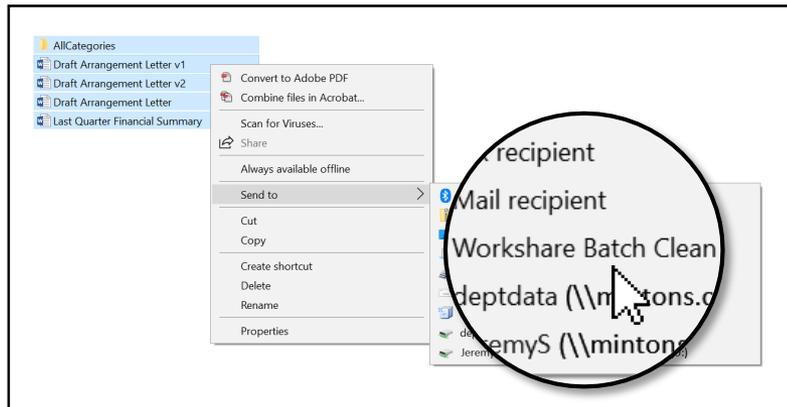
In the Advanced Options dialog, select the checkbox next to the metadata you'd like to remove, then click **OK**.

Your document is cleaned. You can close the Document Risk Report.

Bulk clean files or folders

You can clean multiple files and even whole folders at the same time when they're on your computer.

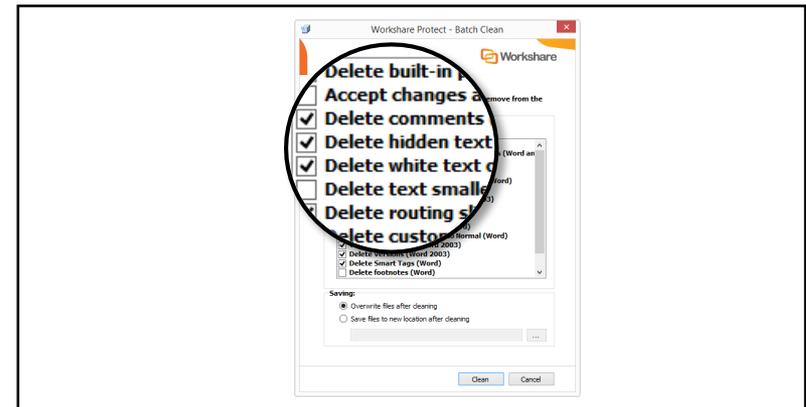
1 Right-click files or folders



Right-click one or more files or folders and select **Send to > Workshare Batch Clean**.

The Batch Clean dialog opens.

2 Remove metadata



Select all the metadata you'd like to remove.

To overwrite the original files with the clean versions, leave **Overwrite files after cleaning** selected. Once you've cleaned the content, it will no longer be possible to access the original files.

To create a clean copy of the files, select **Save files to new location after cleaning** and select a location. Once you clean the content, the original versions will be available from the original location.

Click **Clean**. Your options are applied.



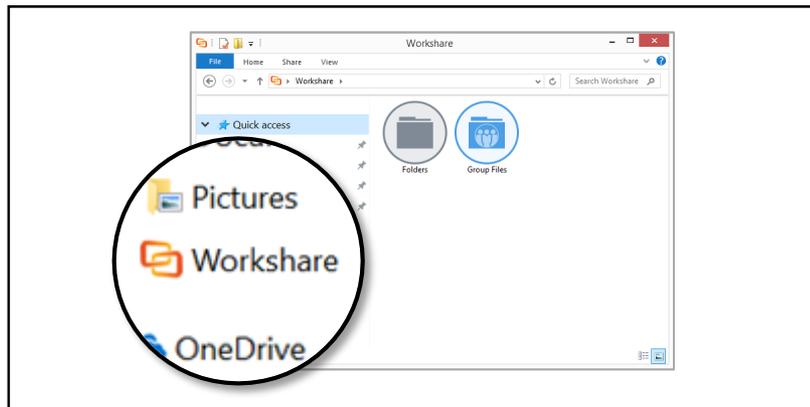
Connect

- Securely store and share files
- Collaborate on shared files

Securely store and share files

Workshare provides secure online spaces to store and share your content. You can store private files in the My Files area. When you want to work with others, share your files in Groups.

a Store files in My Files

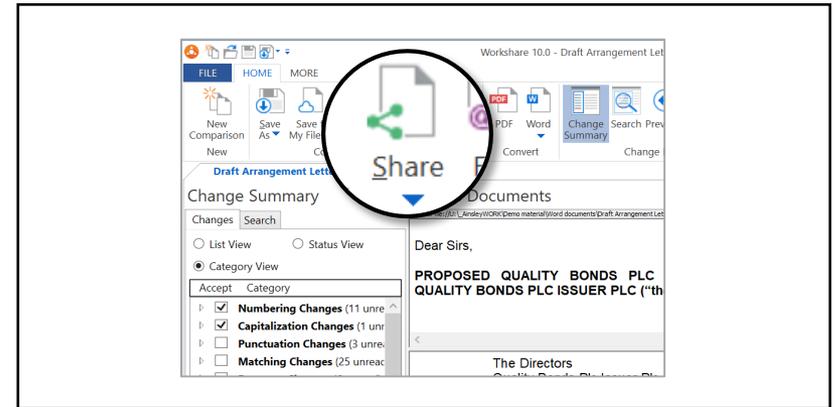


Add private files to My Files using any of these ways:

- Navigate to the **Workshare** folder in File Explorer and drag and the document into **Folders > My Files**.
- Open a file in Word, PowerPoint or Excel or run a comparison with one of Workshare's comparison applications. From there, click the **Save to My Files** button.
- Open the desktop application (double-click the **Workshare** icon) or go to my.workshare.com, then go to the My Files area and click the **Add file** icon.

To access your private files, open the desktop application, visit my.workshare.com or use the mobile app, then click **My Files**.

b Share files in Groups



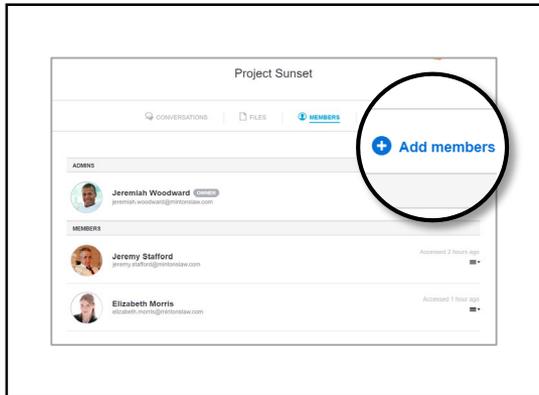
Share files in a Group using any of these ways:

- Navigate to the **Workshare** folder in File Explorer and drag the file into a Group.
- Open a file in Word, PowerPoint or Excel or run a comparison with one of Workshare's comparison applications. From there, click the **Share** button.
- Open the desktop application (double-click the **Workshare** icon) or go to my.workshare.com, then go to the Groups area and click the **Add file** icon.

Collaborate on shared files

You can access the Groups area when you open the Workshare desktop application (double-click the **Workshare** icon), visit my.workshare.com or use the mobile app. All your groups are there.

1 Add members

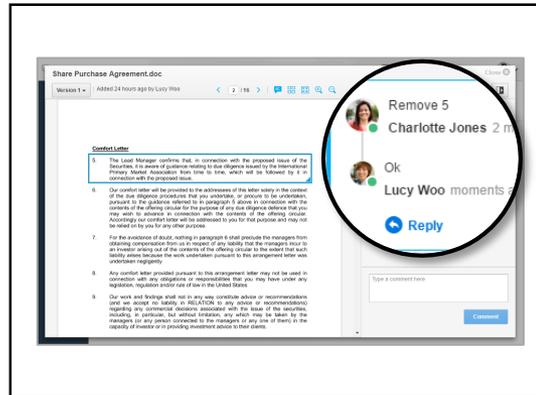


Members can access files and conversations in the group. You can revoke access at any time.

To see who's a member, go to the group's **Members** tab.

To add new members, click **Add members** and enter their email addresses into the field provided.

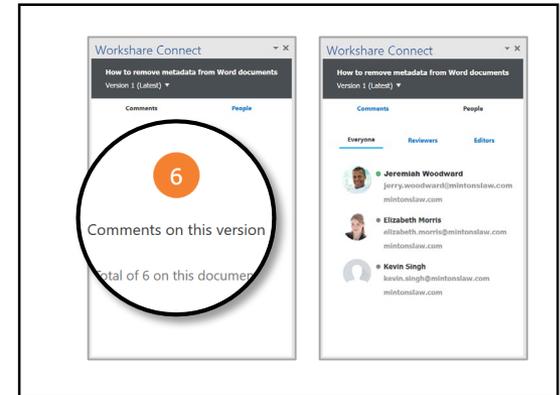
2 Discuss and comment



Groups have two areas for collaboration:

- **Conversations** is a place where anyone can post a message (e.g. share an idea or discuss how the work is going).
- **Files** is where everyone can see the files, add comments and upload new versions. To make a comment, click and drag over an area of the file, or type your comment directly into the comments box.

3 Get live updates



When you've shared a file to a group, you'll see the Workshare Connect panel when you open the file in Word, PowerPoint or Excel.

This panel gives you real-time updates on who is sharing your file, how many comments have been made and whether any new versions have been added.

If you don't see the panel, open it by clicking the **Toggle Panel** button in the Workshare ribbon of Word, PowerPoint or Excel.