

# Workshare 9.5 & NetDocuments

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## User Guide

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## Introducing Workshare Integration with NetDocuments

Workshare reinvents multi-party review by helping users understand, communicate, and implement changes more quickly and accurately. Workshare shows precise changes between versions of documents. The DeltaView redline created sets the standard for an easy-to-read accurate view of changes between document versions. Key features of Workshare's comparison functionality include:

- Comparison of Word, PowerPoint and PDF files, including image-based PDF files
- Comparison of selected pieces of content, such as a single paragraph or clause
- Ability to accept/reject changes in a comparison and then create new documents
- Advanced comparison features for Word and PDF files including one-to-many comparisons, version comparisons, and access from within Word and PowerPoint files

Workshare Professional integrates with NetDocuments to provide key comparison functionality for your NetDocuments files as well as conversion to PDF.

The functionality available with NetDocuments is as follows:

- From within NetDocuments, use **Send to application** to compare your chosen files in Workshare
- When comparing, browse to NetDocuments from within the Workshare select dialog
- After running a comparison, save the redline to NetDocuments
- From within NetDocuments, use **Send to application** to convert your chosen files to PDF using Workshare
- When converting to PDF, save the PDF to NetDocuments

This document describes how to perform this functionality. For a complete description of all Workshare functionality, refer to the *Workshare Professional User Guide*.

## Setting Up the NetDocuments Integration

In order to integrate NetDocuments into Workshare, you must select NetDocuments during the installation and perform some simple configuration in NetDocuments.

**Note:** *ndOffice must be installed to use the Workshare NetDocuments integration.*

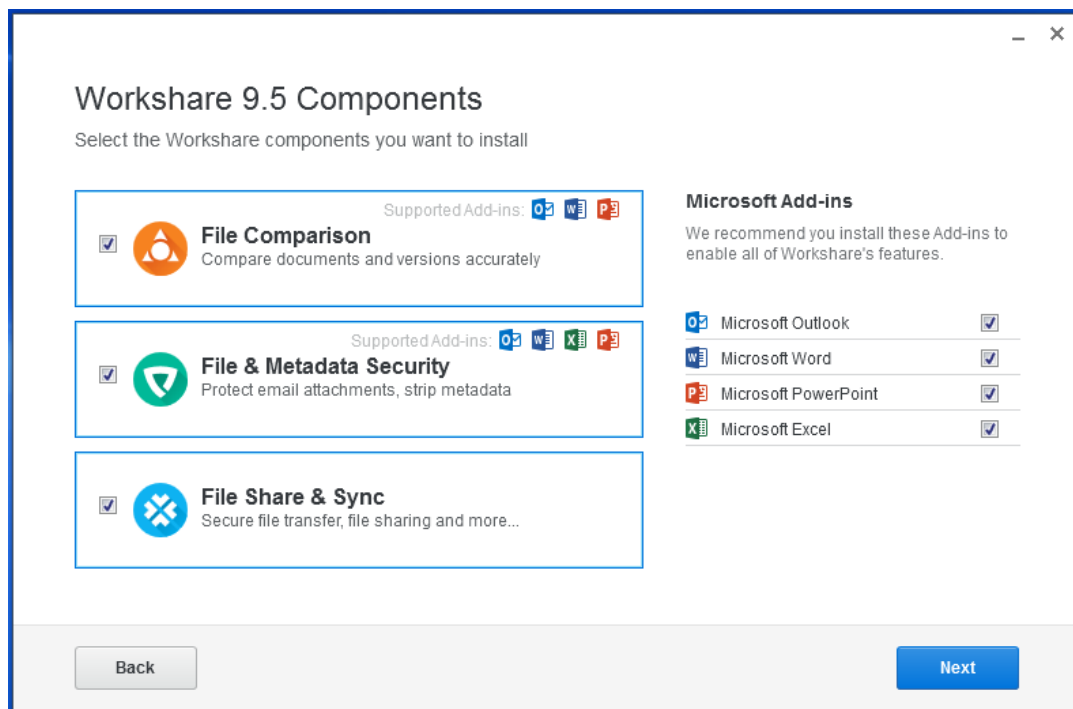
## Installing the NetDocuments integration

During a Workshare installation, on a single machine or a network deployment, you select which DMS integration you want to include.

On a single machine.....

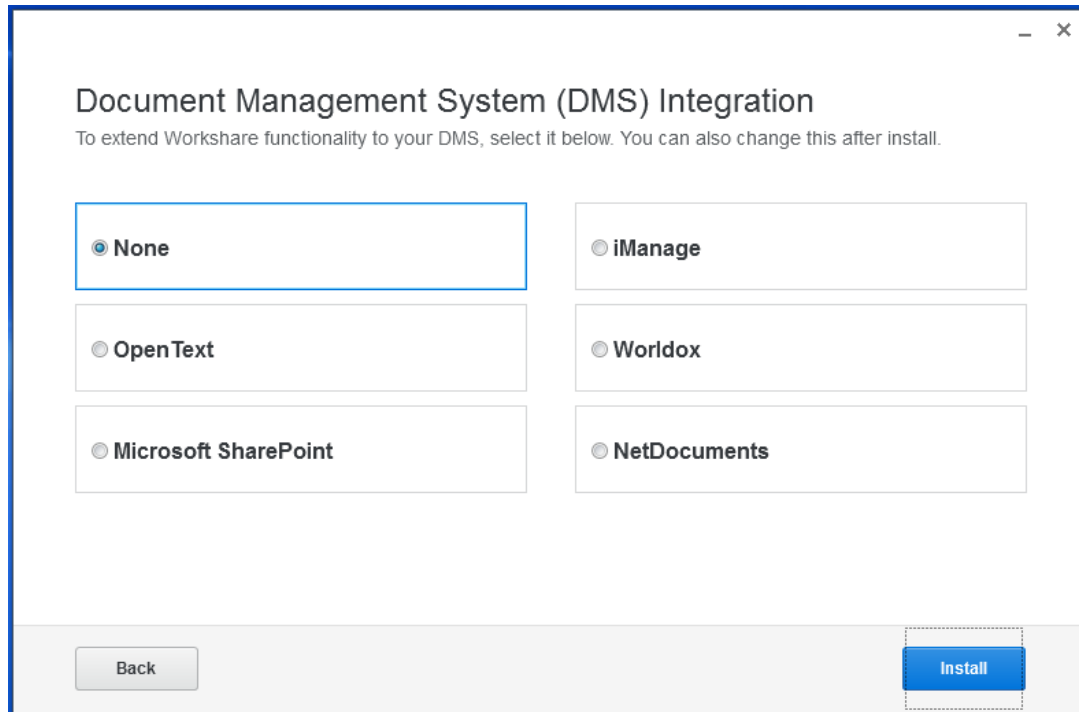
**To install Workshare with NetDocuments integration:**

1. Double-click the executable file.
2. Click **or choose products to install**.



3. Select the Workshare products and the Microsoft Add-ins that you want.

4. Click **Next**.



5. Select **NetDocuments**.
6. Click **Install**. The installation process may take a few minutes. A progress bar indicates the progress of the installation. After this process is completed, click **Finish**.

### In a network deployment.....

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

An example command line install to install Workshare with NetDocuments integration is:

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

For further information about installation, refer to the *Workshare Installation Guide*.

## Configuring NetDocuments

In order to maximize the integration of Workshare in NetDocuments, you should add Workshare as an application to your NetDocuments cabinets. Workshare will then be available when using the NetDocuments **Send to application** functionality.

### To add Workshare as an application:

1. Click your user name and select **Admin** from the menu at the top right of the NetDocuments window.
2. From the **Cabinets** list, click the cabinet you want to add Workshare to.
3. Click **Integrate external applications** at the top of the page.

netdocuments®

Define workspace templates | **Integrate external applications** | Rollback a document

Workshare - Customer Support

Cabinet name: Acme Ltd

Cabinet description: Welcome to the Cabinet Page. This page is designed to be the entry point to this Cabinet's folders and documents and

4. A list of available published applications is displayed and you can select the app you want to be available in the *Send to Application* dialog.

netdocuments®

DOCUMENTS On Demand™

External Applications  
Acme Ltd

Web Applications

External web applications that have been integrated with NetDocuments are listed here. Those selected below will appear in the Send to Application dialog, so users can easily send documents from NetDocuments to these applications.

Add unpublished app

Application Name	Application Description	Application Vendor
<input checked="" type="checkbox"/> Workshare PDF	Convert to pdf with Workshare	Workshare
<input type="checkbox"/> Test	Test application	Corp.
<input checked="" type="checkbox"/> Workshare Compare	Fast and accurate comparison of two documents.	Workshare

Local Applications

Identify the items to display on the Send to Application dialog if found on the local computer.

☒ Workshare (Compare)

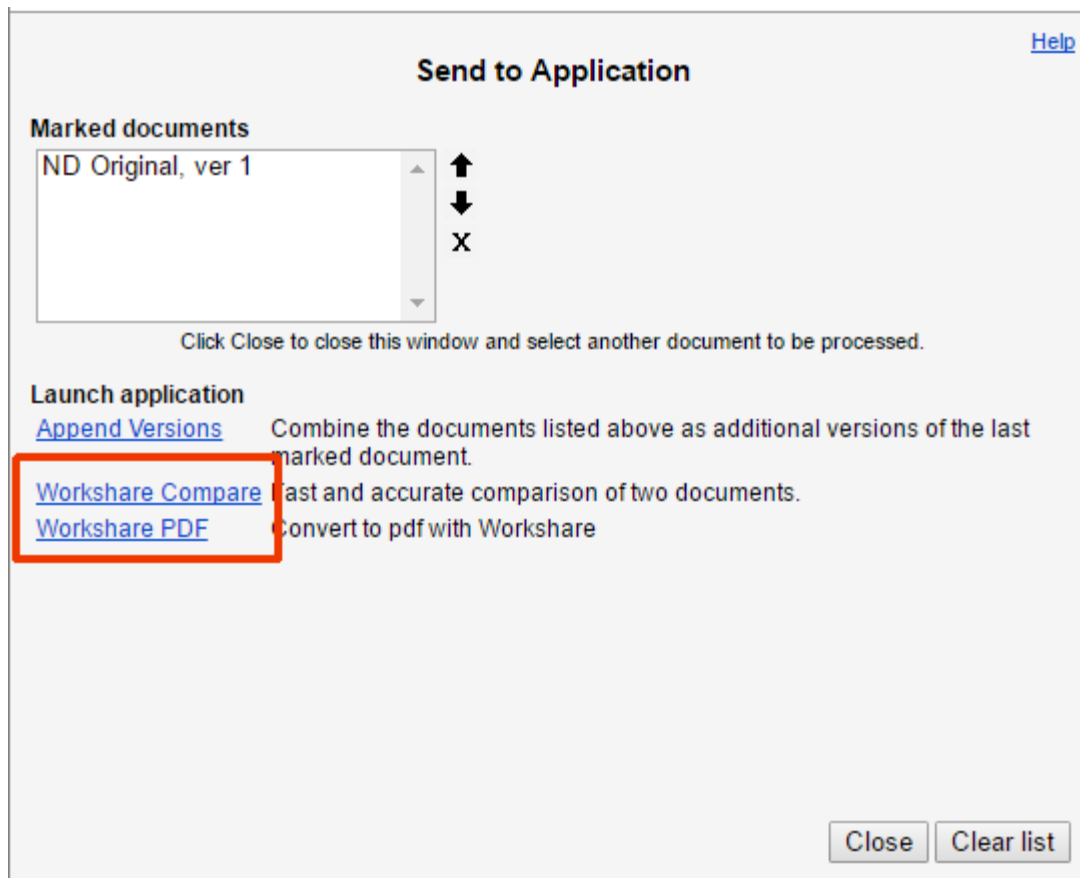
Cancel or Save

5. Make sure **Workshare Compare** and **Workshare PDF** are selected in the **Web Applications** section and that **Workshare (Compare)** is deselected in the **Local Applications** section.

**Note:** Deselecting **Workshare (Compare)** in the **Local Applications** section ensures there is not an additional unnecessary “Workshare” entry in the **Send to Application** dialog.

6. Scroll down and click **Save**.
7. Scroll to the bottom of the cabinet page and click **Submit**.

Now when a user selects the **Send to application** option in NetDocuments, **Workshare Compare** and **Workshare PDF** are listed as available applications.

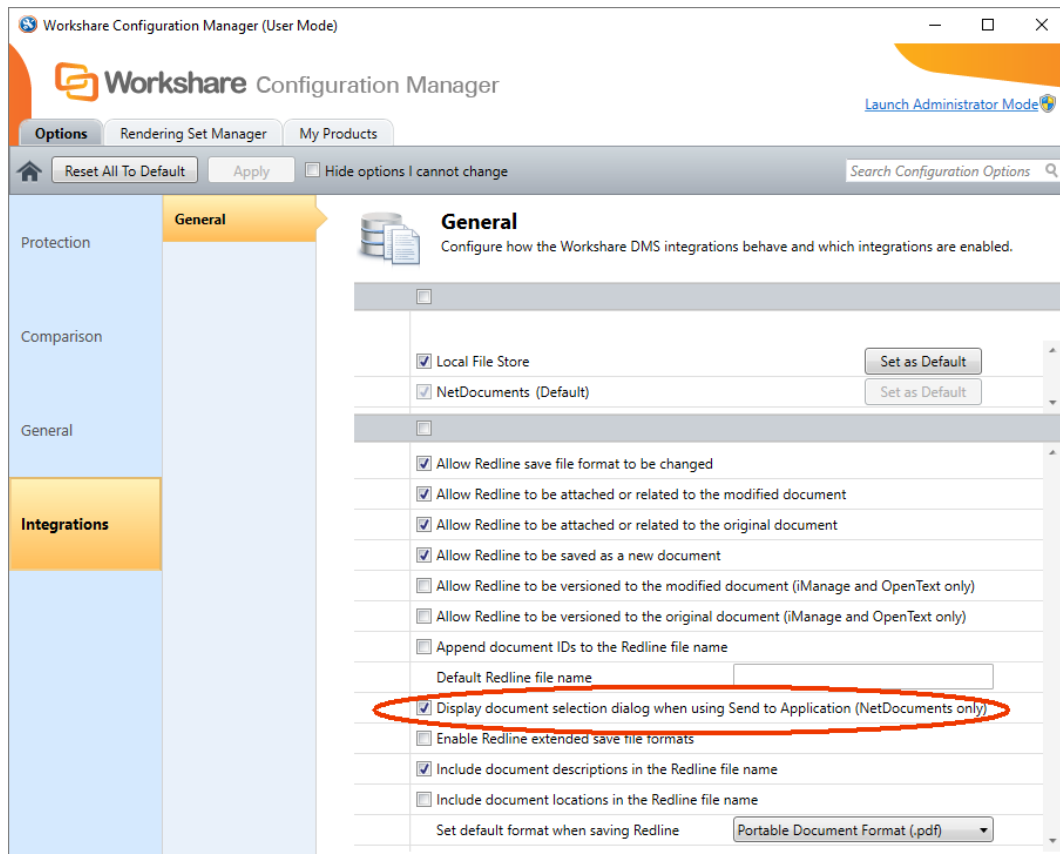


## Configuring Workshare

There is no major configuration required in Workshare to enable the NetDocuments integration. There is a single parameter that can be set to determine if the document selection dialog is displayed when comparing.

### To configure NetDocuments in Workshare:

1. Access the Workshare Configuration Manager, for example, from the Start menu, select **Programs > Workshare > Workshare Configuration (User Mode)**.
2. Select **Integrations > General**.



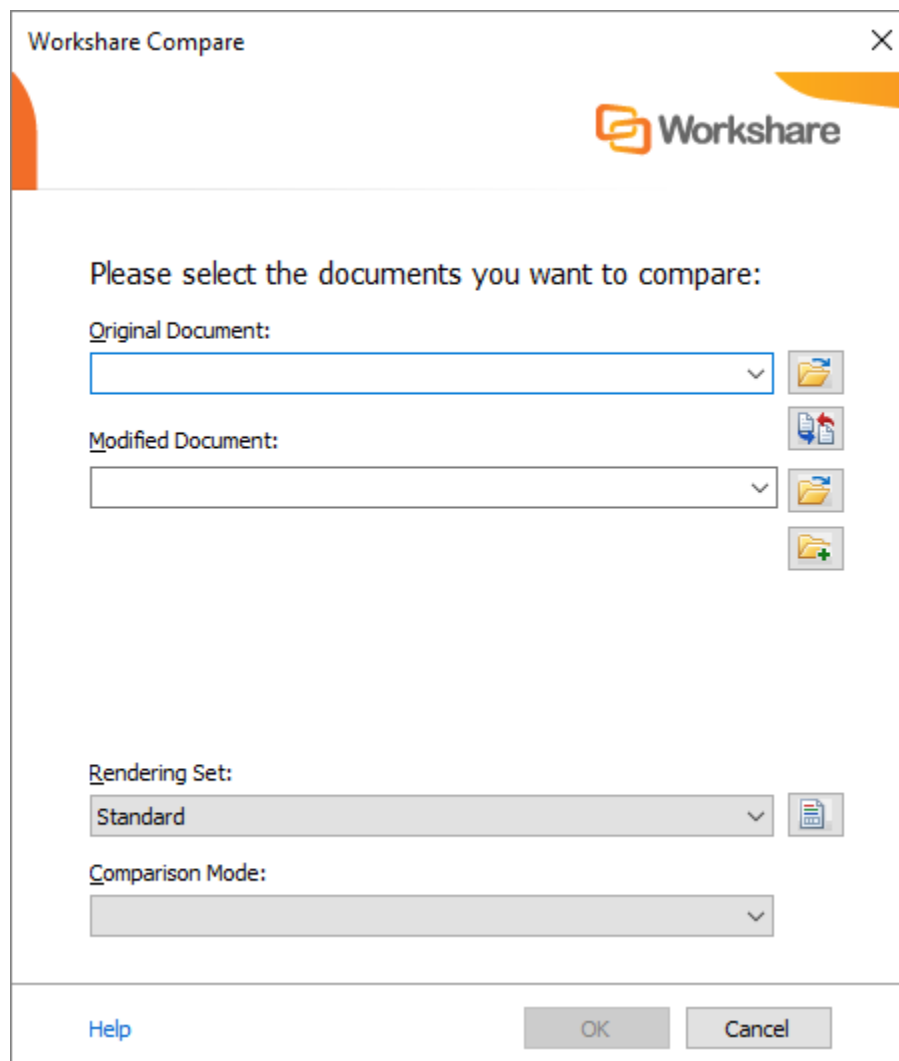
3. If you don't want the Workshare document selection dialog to display when using Send to Application, deselect the **Display document selection dialog when using Send to Application** parameter. When the document selection dialog is displayed, you can switch original and modified documents, add further documents to compare, change the rendering set and so on. In particular, you can change the comparison mode to Fast.
4. Click **Apply** to apply any changes.


## Browsing to NetDocuments from Compare

In this scenario, you launch Workshare Compare as a standalone application from your desktop or the Start menu. You then select the documents you want to compare from NetDocuments. Launching Workshare Compare in this way enables you to perform one-to-many comparisons - comparing a single original document against multiple modified documents.

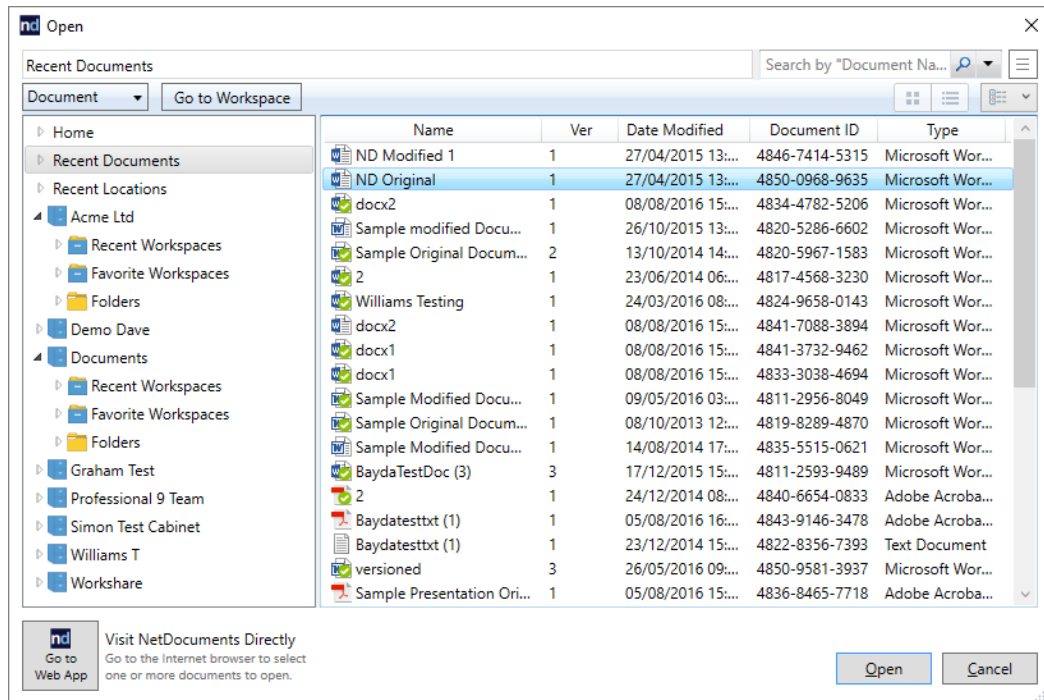
### To compare documents:


1. Double-click the Workshare Compare shortcut on your desktop or from the Start menu, select **Programs > Workshare > Workshare Compare**. The following dialog is displayed:






2. Click  to the right of the **Original Document** field. If you are not logged into NetDocuments, log in using the *Login* dialog displayed.

3. Navigate to the document location in NetDocuments and select your original document that you want to compare against a modified document.

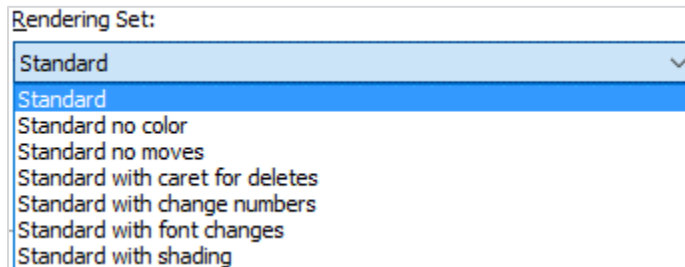


4. Click **Open**. The selected document is displayed in the **Original Document** field.
5. Click  to the right of the **Modified Document** field.
6. Navigate to the document location in NetDocuments and select your modified document that you want to compare against the original document.
7. Click **Open**. The selected document is displayed in the **Modified Document** field.

**Tip!** To swap the original and modified documents, click . This button is only available if you are comparing two documents rather than comparing multiple documents against an original document.

8. If you want to compare the original document against another document, click . An additional **Modified Document** field is added.
9. Click  to the right of the second **Modified Document** field.
10. Navigate to the document location in NetDocuments and select a further modified document that you want to compare against the original document.
11. Click **Open**.
12. Repeat step 9-11 to add further documents as required.

13. From the **Rendering Set** dropdown list, select the rendering set you want to use. Rendering sets contain a set of parameters that define how changes are displayed in the Redline (comparison) document. You can select from the standard rendering sets provided with Workshare Compare or you can create and customize your own rendering sets.



**Note:** Clicking  to the right of the **Rendering Set** field displays the **Rendering Sets Manager** where you can create, modify and delete rendering sets.

14. From the **Comparison Mode** dropdown list, select the type of comparison you want to perform from the following:
- **Standard:** Workshare Compare performs a regular comparison.
  - **Fast:** When comparing a DOC or DOCX file against another DOC or DOCX file, Workshare Compare performs a binary comparison which is faster than a standard comparison.

**Note:** The **Fast** option is only available if the **Enable fast comparison** parameter (**Comparison > Administration** category) in the **Workshare Configuration Manager** is selected.

- **Text Only:** Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.
  - **Compare without OCR:** Workshare Compare compares PDF files without first performing OCR. With image-based PDF files, Workshare Compare will first apply OCR (Optical Character Recognition) processing to translate the images of typewritten text into editable text in order to compare. If you do NOT want Workshare Compare to perform OCR, select this option.
15. Click **OK**. The comparison process is launched and an *In Progress* dialog is displayed.

**Tip:** Progress is also indicated by the shading in the Task Bar icon for Workshare

Compare



When the comparison is complete, the Redline is displayed in the Workshare Compare window. If the original document has been compared against multiple documents, each Redline is displayed in a different tab. For a full description of the Workshare Compare interface, refer to the *Workshare Professional User Guide*.

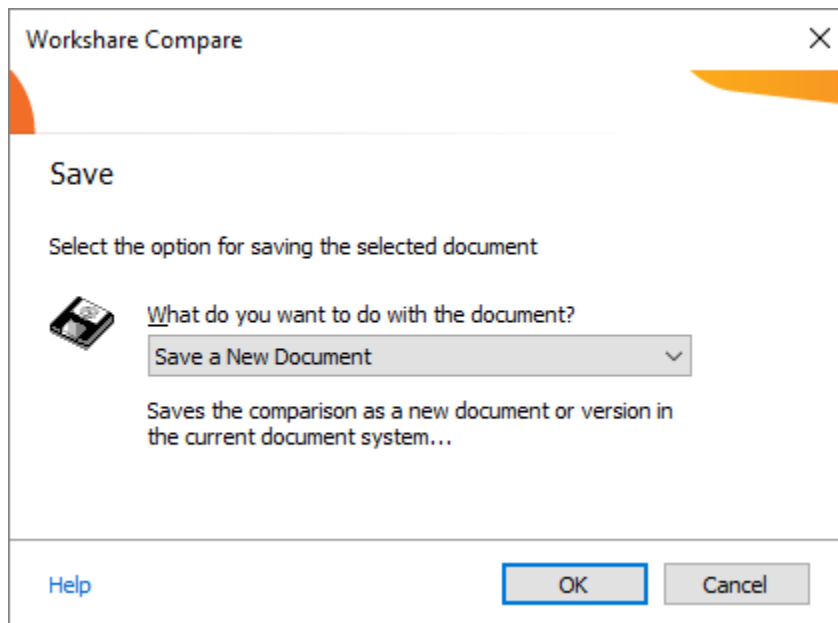
**Note:** When comparing a PDF file, the display may vary according to the type of PDF - the software used to create the PDF file. For example, Adobe, Amyuni, CutePDF, novaPDF, and so on.

## Saving Redlines to NetDocuments

From Workshare Compare, you can save the comparison to NetDocuments as a Workshare DeltaFile (WDF), which contains all three documents (original, modified and redline). You can also save just the redline as a DOC/DOCX, RTF, HTM, TXT or PDF file or you can save the redline as a track change document.

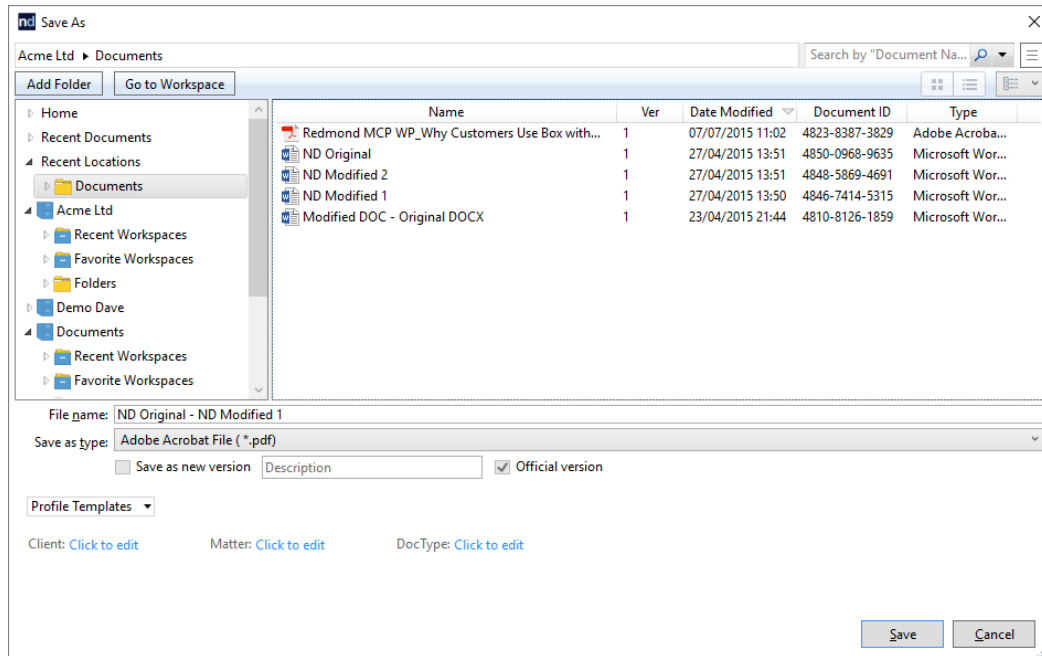
### To save the redline:

1. After running your comparison, click **Save As** and then **Comparison document** in the **Home** tab (or Quick Access Toolbar or File menu). The following dialog is displayed:



2. Select whether you want to save the comparison as a new document or attach it to the original or modified documents.

3. Click **OK**. The NetDocuments Save As dialog is displayed.



**Note:** If you click **Cancel** in this dialog, a message is displayed asking if you would like to save the redline locally.

4. Browse to the location where you want to save the comparison and modify the name of the comparison as required.
5. From the **Save as type** dropdown list, select the format for the saved file from the following:

<b>Workshare DeltaFile (*.wdf)</b>	Saves both the redline and the source documents as a Workshare DeltaFile. This file can only be opened in Workshare Compare.
<b>Word Document (*.doc/*.docx)</b>	Saves the redline as a Microsoft Word file. The source documents are not saved.
<b>Text Only (*.txt)</b>	Saves the redline as a text file. The source documents are not saved.
<b>Rich Text Format (*.rtf)</b>	Saves the redline as an RTF file. The source documents are not saved.
<b>HTML Document (*.htm)</b>	Saves the redline as a HTML document. The source documents are not saved.
<b>Adobe Acrobat File (*.pdf)</b>	Saves the redline as a PDF file. The source documents are not saved.
<b>Adobe Acrobat PDF/A File (*.pdf)</b>	Saves the redline as a PDF/A file. The source documents are not saved.

6. Click **Save**.

## Saving redline as track change document

You can also save the redline as a Microsoft Word file that shows the changes as track changes.

**Note:** The converting to track changes functionality is only enabled, if the **Enable 'Convert to Track Change document'** parameter (**Comparison > User Interface** category) in the Workshare Configuration Manager is selected.

**To save redlines with changes as track changes:**


1. Click **Save As** and then **Word document with Track Changes** in the **Home** tab (or Quick Access Toolbar or File menu).
2. Select whether you want to save the comparison as a new document or attach it to the original or modified documents.
3. Click **OK**. The NetDocuments Save As dialog is displayed.
4. Browse to the location where you want to save the track change document and modify the name of the document as required.
5. Click **Save**. The redline is saved as a Microsoft Word document with the changes indicated by track changes.

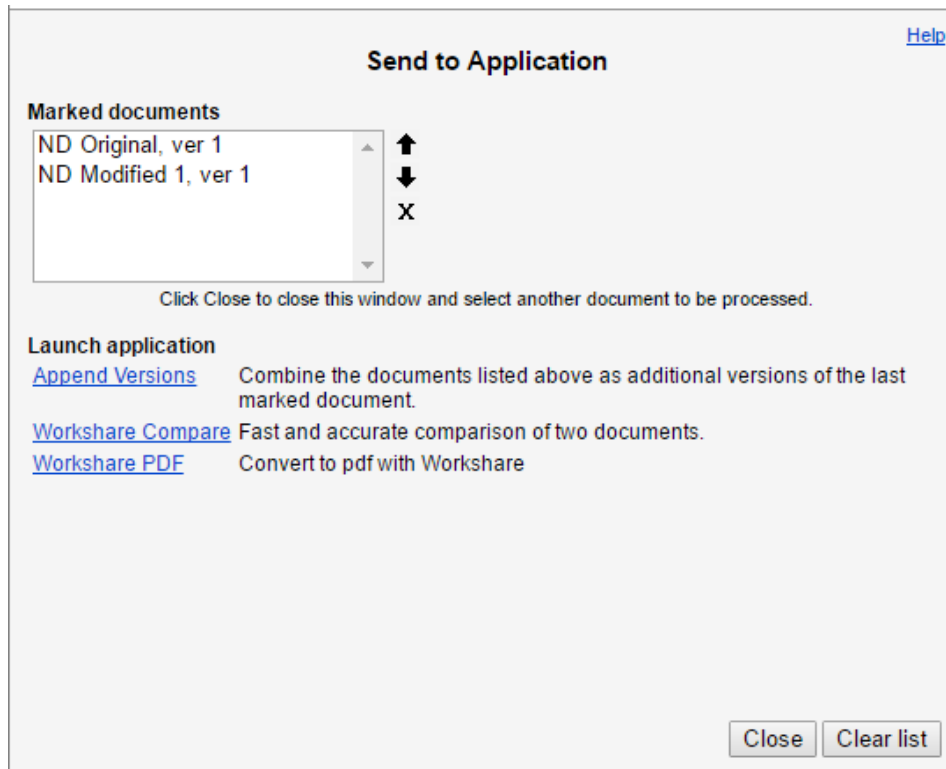
When you open the saved file in Microsoft Word, the changes are displayed as track changes.

## Using Send to Application to Compare

From within NetDocuments, you can select two documents and compare them in Workshare Compare using the **Send to application** functionality. You cannot compare PowerPoint files in this way.

**To compare from NetDocuments:**

1. In NetDocuments, select the two documents you want to compare.
2. Right-click and select **Send to application** (or click  on the right and click **Send to application**).



3. Click **Workshare Compare**.

The selected documents are compared by Workshare Compare. When the comparison is complete, the redline is displayed in the Workshare Compare window.


**Note:** If the **Display document selection dialog when using Send to Application** parameter is selected in the Workshare Configuration Manager (**Integrations>NetDocuments**) then the Compare document selection dialog is displayed and you can switch original and modified, add further documents to compare, change the rendering set and so on. In particular, you can change the comparison mode to Fast.

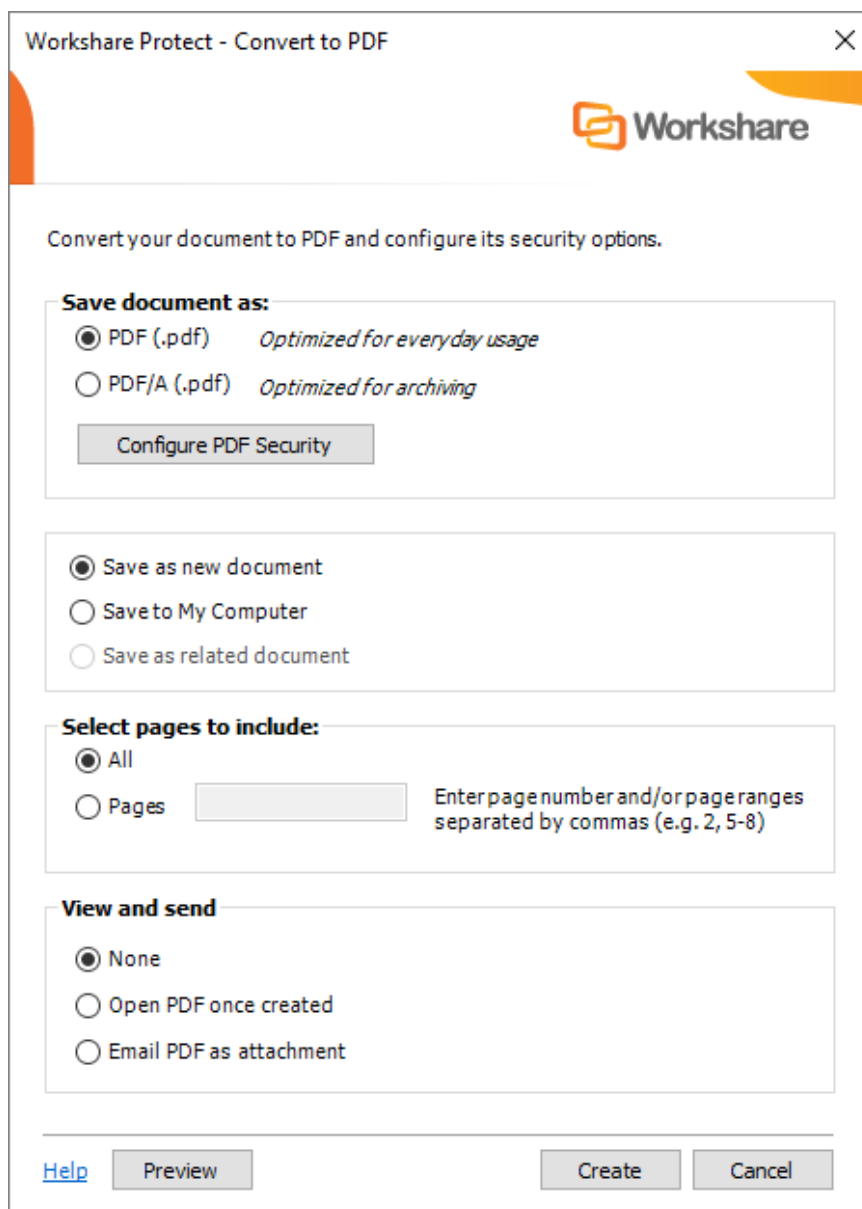
For a full description of the Workshare Compare interface, refer to the *Workshare Professional User Guide*.

# Converting to PDF

From within NetDocuments, you can select a document and convert it to PDF or PDF/A using Workshare.

## To convert to PDF from NetDocuments:

1. In NetDocuments, select the document you want to convert.
2. Right-click and select **Send to application** (or click  on the right and click **Send to application**).
3. Click **Workshare PDF**. The *Convert to PDF* dialog is displayed.



The dialog box is titled "Workshare Protect - Convert to PDF" and features the Workshare logo in the top right corner. It contains several sections for configuring the PDF conversion process.

Convert your document to PDF and configure its security options.

**Save document as:**

- ☒ PDF (.pdf) *Optimized for everyday usage*
- ☐ PDF/A (.pdf) *Optimized for archiving*

[Configure PDF Security](#)

☒ Save as new document

☐ Save to My Computer

☐ Save as related document

**Select pages to include:**

☒ All

☐ Pages  Enter page number and/or page ranges separated by commas (e.g. 2, 5-8)

**View and send**

☒ None

☐ Open PDF once created

☐ Email PDF as attachment

[Help](#) [Preview](#) [Create](#) [Cancel](#)

4. Select whether to convert to PDF or PDF/A.
5. Click **Configure PDF Security** to set PDF security options and remove metadata.

The screenshot shows the 'Workshare Protect' dialog box with a close button (X) in the top right corner. The dialog is divided into three main sections:

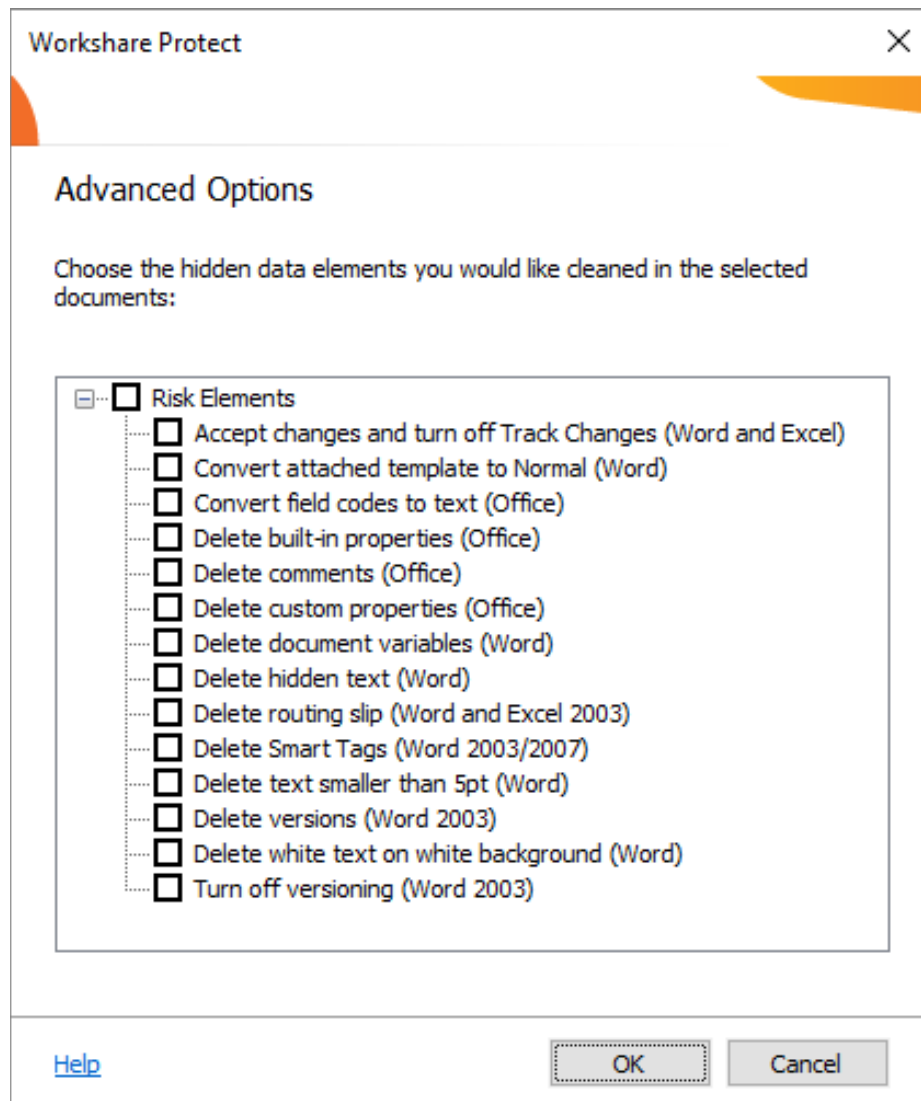
- PDF security configuration:** Contains four unchecked checkboxes:
  - ☐ Prevent printing
  - ☐ Prevent editing of text
  - ☐ Prevent the copying of text and/or graphics
  - ☐ Prevent comments being added
- Metadata cleaning:** Features a 'Cleaning Options' button and the text '0 option(s) selected'.
- Password protection:** Includes the instruction 'Specify a password for the generated PDF. Only users with the password can open the document.' and two input fields labeled 'Specify password' and 'Confirm password'.

At the bottom right, there are 'Apply' and 'Cancel' buttons.

6. Select one or more of the following security options:
  - **Prevent printing:** Prevents users from printing the PDF document.
  - **Prevent editing of text:** Prevents users with Adobe Distiller from editing the PDF document.
  - **Prevent the copying of text and/or graphics:** Prevents users from copying graphics or text directly from the PDF document.
  - **Prevent comments being added:** Prevents users with Adobe Distiller from adding comments to the PDF document.

**Note:** These options are disabled and cannot be selected if you selected PDF/A in step 2.

7. To specify what hidden data to remove before converting it to PDF, click **Cleaning Options**.



8. Select hidden data elements as required.
9. Click **OK**.
10. If required, set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, users can only open the PDF after entering this password.

**Note:** If you selected PDF/A in step 2, you cannot set a password and the Password protection area is disabled.

11. Click **Apply**.

12. In the *Convert to PDF* dialog, select whether you want to save the PDF as a new document or related document in NetDocuments or whether you want to save it locally.
13. If you want to create a PDF of part of the document only, select the **Pages** radio button and specify a page range.

**Note:** You can also PDF individual pages by specifying the pages (separated by commas) in the **Pages** field.

14. In the **View and send** area, select the **Open PDF once created** checkbox if you want the PDF to be opened once it has been created or select the **Email PDF as attachment** checkbox if you want the PDF to be attached to an email once it has been created.
15. If required, click **Preview** to view the document as a PDF.
16. Click **Create**.
17. In the save dialog, specify the name and location for the PDF file and click **Save**. The document is converted to PDF or PDF/A. If you selected **Open PDF once created**, the new PDF is opened. If you selected **Email PDF as attachment**, an email message window is displayed with the PDF as an attachment.

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