Workshare Professional 4
Secure Document Compliance for Microsoft Office

WORKSHARE | DOCUMENT INTEGRITY SOLUTIONS

TOP 5 BENEFITS

- Always On Audit of Document Events
- Captures Document States Dynamically
- Version Synchronization over Email
- Policy-based Security
- Report Wizard for Document Audit

" *Workshare Professional gives us an integral solution to assemble contracts, manage complex review processes, secure the exchange of documents outside our firm and audit the entire active lifecycle.*"

Kevin Fick,
Senior Vice President of Sales,
Central Garden and Pet Company

"Workshare is an excellent example of a Microsoft Gold Certified Partner bringing mission-critical value to mutual customers. Document integrity, tighter security and compliance are absolute requirements to businesses of all types in this increasingly regulated environment, and Workshare's integration with the Microsoft Office System gives users the power to meet this challenge."

Adam LeVasseur,
Group Product Manager
Microsoft Corp.

Microsoft®
GOLD CERTIFIED
Partner

Businesses have invested much time and resource into controlling information. At every stage of the document lifecycle - assembly, review, verify and secure - content needs to be managed, controlled and secured. At the same time, organizations are facing mounting pressure to provide visibility into document processes to meet external regulations. Companies are finding that Microsoft® Office® applications, and investments made in large enterprise applications, are not enough.

Document Process Challenges

For many organizations, including professional service organizations, corporations and governments, controlling document processes presents many challenges for both administrators and information workers, increasingly for those working with high value documents in corporate departments such as Sales, Finance, Operations and HR.

These challenges include: working with others inside or outside the organization to streamline the editing and reviewing process; synchronizing document changes between SharePoint, email and document repositories; quickly and accurately verifying content between different versions of a document; securing and protecting sensitive information; preventing inadvertent document distribution; and finally, capturing and auditing all document processes to meet compliancy requirements.

Controlling High Value Documents

Workshare Professional 4 (WP4) allows you to accurately verify, secure, and manage important document processes by automating typical document functions in Microsoft Office applications.

WP4 bridges the productivity gap between Office documents, email applications, and document repositories, effectively allowing information workers to easily exchange documents with others on the assembly, review, verification and secure distribution of their high value documents. WP4 captures important document processes, allowing users to generate powerful reports presenting a document's audit, history and risk. Administrators can establish policy-enforced security for document distribution and control over document rights.

Take Control

Sales and finance organizations benefit by using WP4 to manage important projects from assembly to delivery by managing changes from different reviewers. WP4 allows them to quickly act on those changes directly inside Office applications, while keeping an audit trail that captures important document processes.

Using WP4, lawyers and accountants can ensure that important changes are verified and captured in the latest version, while accurately presenting changes between different versions stored in separate repositories, DMS or email systems

"Workshare Professional combines the power of policy-enforced security with the simplicity of ad hoc content processing. Workshare's corporate customers and accounting and legal firms will benefit from this transparent means to share Microsoft Office documents that comply with internal policies and external regulations."

Geoffrey Bock, senior vice president, Patricia Seybold Group

Enable ad-hoc Document Processes

- Initiate document processes directly from Workshare panel within Microsoft Word, Excel, and PowerPoint.
- Manage the assembly and review of documents from popular Document Management Systems, such as Documentum, Interwoven and Hummingbird.
- Integration for document distribution and security into email systems Outlook, Notes and Groupwise.
- Supports collaborative reviews through shared SharePoint workspaces.
- Correctly identifies master document from both documents returned as email attachments, and review copies in SharePoint.
- Configurable UI allows administrators to limit application features so users are only presented with relevant features.

Capture Document and Email Events

- Includes a complete comparison tool, built on industry leading Workshare® DeltaView® comparison technology.
- Provides a consolidated list of all proposed changes, listed by reviewers name on a single screen with "accept," "reject," and "follow up" choices for every proposed change (See Figure 1).
- Shows both the original document and the comparison document in a split screen.
- Allows users to apply changes after performing a comparison Prevents document corruption such as format changes, lost data, etc.
- Associates the returned email attachment to the original document. The email can then be opened from Workshare panel without having to leave Word.
- Automatically removes sensitive document metadata when Microsoft® Office files are sent via email.

Secure Review and Exchange

- Automatically convert documents to PDF when sending Microsoft Office documents via email.
- Reports on a document's hidden data and provides a view of all present document metadata so the author can decide whether to send it or not.
- Report and Clean on documents within Microsoft® Word, Microsoft® Excel, and Microsoft® PowerPoint files.
- Create PDFs from Word, Excel and PowerPoint applications
- Add standard PDF security options to add a password or restrict the document.
- Document Rights restrict accidental distribution of documents.

Provide Audit Visibility

- The Document Audit Report provides an audit of a document's history, proposed changes, and status of each proposed change.
- The Document History Report provides data on sent for review events, and returned response events.
- The Document Review Report provides detailed information about the changes made by all people against a specific revision.
- The Document Risk Report provides a detailed report about the types of hidden data that exists in a document and their potential risk.
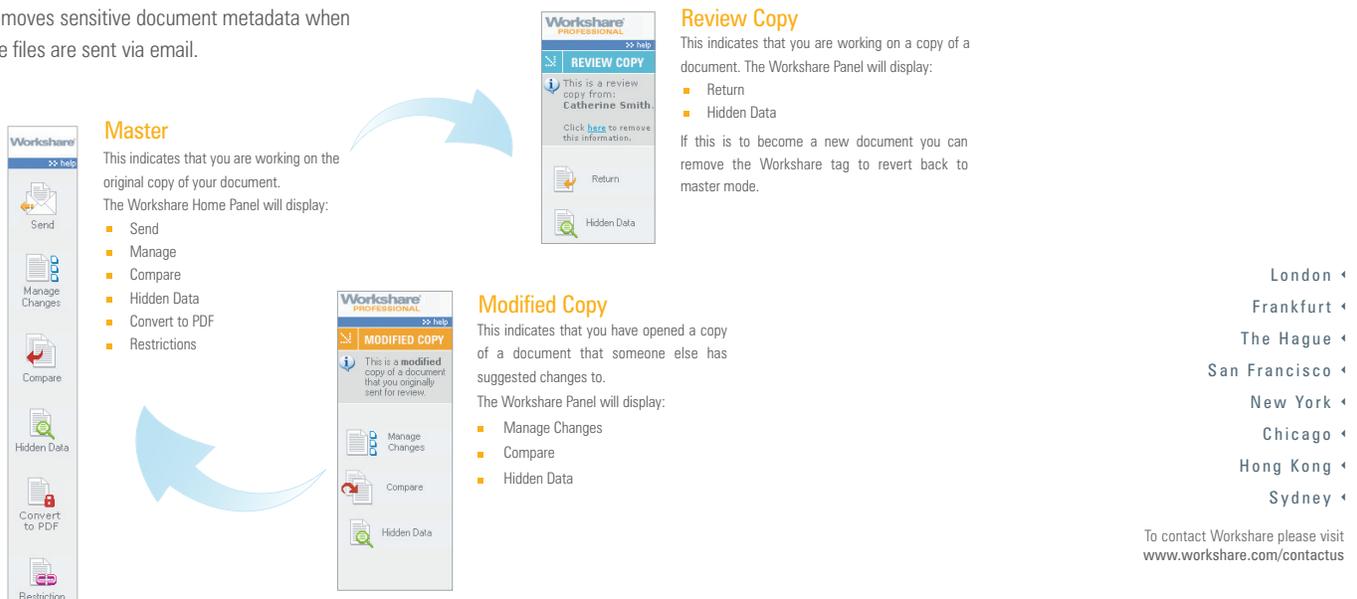
Master

This indicates that you are working on the original copy of your document.
The Workshare Home Panel will display:
- Send
- Manage
- Compare
- Hidden Data
- Convert to PDF
- Restrictions

Review Copy

This indicates that you are working on a copy of a document. The Workshare Panel will display:
- Return
- Hidden Data

If this is to become a new document you can remove the Workshare tag to revert back to master mode.

Modified Copy

This indicates that you have opened a copy of a document that someone else has suggested changes to.
The Workshare Panel will display:
- Manage Changes
- Compare
- Hidden Data

Figure 1 showing Workshare Professional 4's dynamic document states.