



## Wdesk Sync Installer Technical Details

### Overview

This document will provide IT teams the information needed to get the Wdesk Sync Microsoft Excel add-in installed. Wdesk Sync allows Wdesk users to synchronize information from an Excel spreadsheet on your computer to your account, allowing you to create new workbooks or update existing ones with data on your computer in just a few simple clicks.

### Versions

We typically release a new version with multiple fixes and/or improvements on a regular basis. If you are using the Alternate (Offline) installer it will be up to the company if they want to upgrade, but this will not typically be required. There may be situations where we have security improvements or breaking changes where you will be notified, and an update would be required.

### Release Notes

We publish our release notes so that users can see what a newer version includes to help with the decision to upgrade when using the alternate (offline) installer. The release notes can be found at: <http://plugins.webfilings.com/help/WdeskSyncReleaseNotes.pdf>

### Installers

Workiva has two different options when installing the Excel add-in. Both have the same installation requirements. We recommend the Standard (ClickOnce) installer, but if the software is deployed out to users by IT, then the offline installer is the preferred solution.

	Standard (ClickOnce)	Alternate (Offline)
Auto Update?	Yes	No
Type of Installer	Microsoft ClickOnce	InstallShield (32-bit AND 64-bit versions)
Auto install of pre-requisites?	Yes	Yes
Install for all users?	No	Yes
Automatic Deploys (SCCM etc)	Not recommended	Yes
Silent Install?	Not recommended	Yes
Install URL	<a href="http://plugins.webfilings.com/setup.exe">http://plugins.webfilings.com/setup.exe</a>	<a href="http://plugins.webfilings.com/offline/WdeskSync-OfflineInstaller.zip">http://plugins.webfilings.com/offline/WdeskSync-OfflineInstaller.zip</a>
Update?	When Excel loads it automatically checks for updates on : <a href="http://plugins.webfilings.com">http://plugins.webfilings.com</a>	Manual (latest version always at URL above)
Install Directions	Download and run the setup.exe and it will walk you through the setup process. Once the add-in has been installed, restart your computer and open the spreadsheet you'd like to sync to your account.	Download the zip file, unzip, and run WdeskSyncOfflineInstaller.exe OR WdeskSyncOfflineInstaller (32-bit) .exe for a 32-bit installer. Once the add-in has been installed, restart your computer and open the spreadsheet you'd like to sync to your account.

# Installation Requirements

## **User Permissions**

The user account performing the installation must be an administrator on the PC in question.

## **Prerequisites**

- Microsoft Windows 7 (or newer)
- Microsoft Excel 2010, 2013, 2016 (including Office 365)
- .Net Framework 4.5 (or newer)
- Microsoft Office 2007 Primary Interop Assemblies
- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTO 2010) (x86 and x64)
- Windows Installer 3.1

## **Office 365 ProPlus Click-To-Run**

WDesk Sync must be used with a fully-installed local version of Excel. If your IT department is using the Click-To-Run technology for Office 365 you must ensure that Excel has been fully installed before attempting to load the WDesk Sync plugin.

# External Communication

## **Ports and Protocols**

Wdesk Sync uses HTTPS and port 443 for all its communications with Workiva in order to ensure a secure connection to the region used. If the appropriate proxy configuration option is not available we recommend whitelisting all traffic to the region (domain). We do not recommend whitelisting based on the IP address currently associated with the domain, because the IP for either domain could change to another IP address frequently.

### **Domains for Regions:**

- United States - webfilings.appspot.com
- United States (wdesk.com) - app.wdesk.com
- European Union - webfilings-eu.appspot.com
- European Union (wdesk.com) - eu.wdesk.com

## **Network (Proxy) Configuration**

We support the following proxy configurations. If one of these does not work then we recommend traffic to Wdesk servers be whitelisted (see above).

### **Auto Detect (default)**

Auto Detect is the default configuration and should be used in most situations, and does not require any user setup. This option uses the Windows settings that can be found in the Local Area Network (LAN) settings under Internet options.

### **No Proxy**

No Proxy configuration will bypass any proxy settings and attempt to connect to the Wdesk servers directly. This is not recommended, and can result in traffic being blocked by a proxy or firewall.

### **Manual (explicit authentication)**

Manual configuration should be used when a username and password are required to connect to a network via a proxy server. This setting requires a host, port, username, and password. Usernames and Passwords are securely stored in the Windows Credential Manager.

## Wdesk Login

The Wdesk login and authentication process uses the existing login in the user's default web browser. The login is launched from the Excel add-in to the default browser to create a shared login session from Wdesk. Users can walk through that process with the following help article: <https://help.webfilings.com/article/synchronizing-workbooks-your-account>. All login features such as Single Sign-On (SAML) or Browser Validation are supported as a direct result of utilizing the browser-based login.

## Assemblies Included With Wdesk Sync

These assemblies are included with the Wdesk Sync installation.

### Workiva Libraries

- WF\_ExcelAddIn.dll
- WFAPI.dll
- WIF.dll

### Microsoft Libraries

- Microsoft.Office.Interop.Excel.dll
- Microsoft.Vbe.Interop.dll
- Office.dll

### Third Party Libraries

- DevComponents.DotNetBar2.dll
- log4net.dll (version 1.2.11 or newer)
- Newtonsoft.Json.dll
- SpreadsheetGear2012.dll
- CredentialManagement.dll (version 1.0.1 or newer)

## Windows Registry

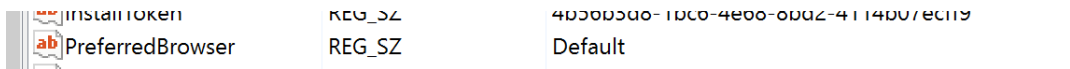
Wdesk Sync uses the Windows Registry to store supplemental settings used in the add-in. Examples of data stored in the Registry include:

- User default settings
- Add-in functionality toggles

The key under which this data is stored is "HKEY\_CURRENT\_USER\Software\WebFilings\ExcelSync"

### Preferred Browser setting:

The registry key is named: PreferredBrowser and can be located in the "HKEY\_CURRENT\_USER\Software\WebFilings\ExcelSync" key, as shown below. The registry value should be set to the executable path for your preferred browser, or "Default" for the default browser. For example, "C:\Program Files\Internet Explorer\iexplore.exe"



instan1oken	REG_SZ	4030b3d0-1b00-4e00-0b02-4114007ec119
ab PreferredBrowser	REG_SZ	Default

### Mandatory Browser setting (new in version 2.3.3):

You can manually create a new string value (REG\_SZ) named "MandatoryBrowser", located in the "HKEY\_CURRENT\_USER\Software\WebFilings\ExcelSync" key, as shown below. The registry value should be set to the executable path for your mandatory browser. For example, "C:\Program Files\Internet Explorer\iexplore.exe"

This will override the Preferred Browser setting and disable the ability for a user to change default browsers for the WDesk Sync plugin.

