



IPSWITCH™

# Collaboration Suite

**WorkgroupShare**

Server Guide

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<b>Ipswitch Inc.</b>	<b>Web: <a href="http://www.ipswitch.com">www.ipswitch.com</a></b>
<b>10 Maguire Rd., Suite 220</b>	<b>Phone: 781.676.5700</b>
<b>Lexington, MA 02421</b>	<b>Fax: 781.676.5710</b>

### WorkgroupShare Client Guide

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# Installing WorkgroupShare Server

## Chapter 1

### Overview

WorkgroupShare is a plug-in for Microsoft Outlook that lets you share Outlook data, such as calendars, tasks, contacts, distribution lists and notes, with other users in your organization.

This chapter describes how to install the WorkgroupShare server. The server program is installed onto a single computer, which acts as the shared information server. Client computers must have TCP/IP access to the server computer.

### Installation

- 1 From the Ipswitch Collaboration Suite installer, select **WorkgroupShare** and click **Install**. The Welcome dialog appears.
- 2 Read the information on the screen, then click **Next** to continue. The License dialog appears.
- 3 Read the license agreement. If you agree to the terms of the agreement, click **Accept**. The Executable Type dialog appears.
- 4 Select how you would like to install the server:
  - **Install WorkgroupShare as an executable program.** You will have to log on to the server and manually start WorkgroupShare each time the server is rebooted.
  - **Install WorkgroupShare as a Windows service.** Windows will automatically restart the service each time the system is rebooted. This is the recommended selection.

Click **Next** to continue. The Select Folder dialog appears.

### In this Chapter

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Overview

Installation

Registering WorkgroupShare

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- 5 This page lets you choose the location for the program files and the location for the data folder, where the WorkgroupShare database will be installed. Enter locations for the **Program Folder** (where the server program is stored) and the **Data Folder** (where WorkgroupShare data is stored). Click **Next**. The Details dialog appears.
- 6 Enter your **Organization Name**, **Your Name** and **Your EMail Address**, then click **Next**. The Update Interval dialog appears.
- 7 Select or enter an **Update Interval**. This value sets how frequently, in minutes, the clients will connect to the server for synchronizing. Click **Next**. The Server Address dialog appears.
- 8 Select or enter the **Address** that clients should use to connect to the WorkgroupShare server.

**Note:** If this computer has a dynamic IP address, then it is best for the clients to access this computer by its computer name. If the computer has a static IP address or if the clients will be accessing it over the Internet, then you must select the appropriate IP address that represents this computer from the drop down list.

Click **Next**. The Summary dialog appears.

- 9 To complete the installation, click **Finish**. The setup program will install the relevant files onto the server computer and, once complete, will display the Successfully Installed dialog box.
- 10 Click **OK**. The WorkgroupShare Server installation is completed.

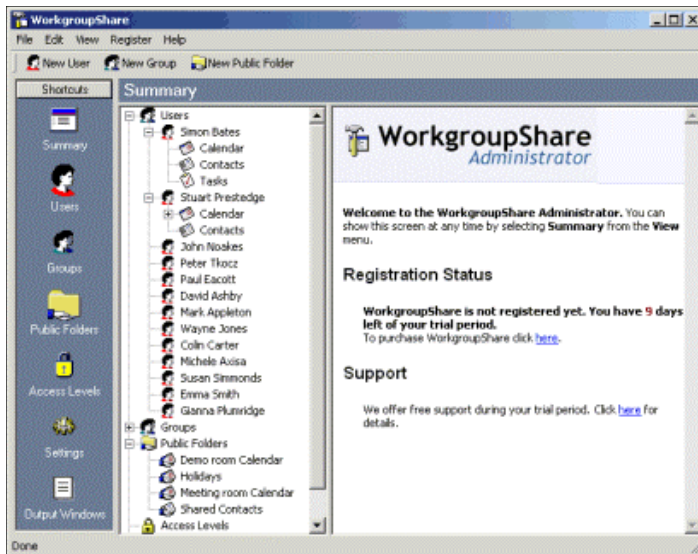
## Registering WorkgroupShare

- 1 Go to <http://visit.ipswitch.com/wgskey> to obtain the WorkgroupShare keycode that is required to activate WorkgroupShare. After your registration is verified, the WorkgroupShare keycode is provided to you.
- 2 Launch **WorkgroupShare Administrator**.
- 3 On the menu bar, select **Register > Enter Keycode**. The Enter Keycode dialog box appears.
- 4 The keycode information that you received contains the name of your company and the keycode. Both pieces of information are case sensitive and must be entered exactly as displayed.
- 5 When you have entered the keycode information, click **OK**. If you have entered the information correctly, WorkgroupShare will inform you that registration was successful.

# Administering WorkgroupShare Server

## Chapter 2

WorkgroupShare Administrator lets you specify who can participate in information sharing and who has access to the specific shared information within your organization.



The left-hand window of WorkgroupShare Administrator shows a tree list containing the currently defined list of users, groups and public folders.

## Summary Screen

When you first run WorkgroupShare Administrator, the summary screen is displayed. This shows you your registration status and provides links to the support pages of the WorkgroupShare web site.

You can reach this page at any time by pressing **Ctrl+S** or clicking **Summary** on the Shortcuts bar.

### In this Chapter

Summary Screen

Users

Groups

Public Folders

Access Rights

Settings

Output Window

# Users

When you install WorkgroupShare, the setup program automatically creates the first user, so when you run WorkgroupShare Administrator for the first time, one user will already exist.

**Note:** User accounts must be created before users install the WorkgroupShare client.

You can add users to Workgroup Share three ways:

- WorkgroupShare Administrator
- Importing users from Ipswitch IMail Server
- Importing users from Active Directory

## Adding Users with WorkgroupShare Administrator

To add a new user with WorkgroupShare Administrator:

- 1 Click the **New User** toolbar button at the top of WorkgroupShare Administrator. The New User dialog appears.
- 2 Enter the user's full name into **Name**.
- 3 The **Account Name** will be auto-generated by the wizard, but you can also enter a custom value.
- 4 Enter a **Password**.
- 5 Click **Finish** to complete the user addition.

If there are many users in your organization, you may prefer to import the users from Ipswitch IMail Server or the active directory, as described in the next section.

## Importing Users from Ipswitch IMail Server

To import Ipswitch IMail Server users into WorkgroupShare, you must install the WorkgroupShare import utility from the Ipswitch Collaboration Suite installer. After the import utility installs, it launches automatically. Follow the on-screen instructions to import Ipswitch IMail users into WorkgroupShare.

**Note:** If you need to run the import utility again, it can be found in the Ipswitch IMail program directory. The utility is named **WGS\_Import.exe**.

## Importing Users from the Active Directory

To import users from the active directory:

- 1 Select **Edit > Synchronize Active Directory Users** from the WorkgroupShare Administrator menu. The Sync Active Directory wizard appears.
- 2 Select the users that you wish to import from the active directory and click **Next**. The Summary page is shown, listing the users that will be imported.
- 3 To complete the process, click **Finish**.

## The User Details View

Once you have added a user, that user will appear in the left-hand list under the expanded **Users** entry. You can show the user's details in the right-hand window by selecting the user in the left-hand list.

**?** **Folders and Access for Stuart Prestedge**

This page lets you view the folders for Stuart Prestedge and lets you view which folders Stuart Prestedge has access to.

**Stuart Prestedge has the following personal folders:**

Folder Name	Action
Calendar	Access Rights...
Contacts	Access Rights...
Tasks	Access Rights...

**Grant other users access to this user's folders...**

**Stuart Prestedge has access to the following shared folders:**

Folder Name	Owner	Access
Tasks	Simon Bates	Read Access
Contacts	Simon Bates	Read Access
Calendar	Simon Bates	Read Access
Shared Contacts		Read Access

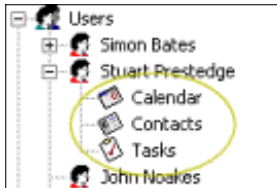
The view consists of two tables. The top table lists the folders that have been synchronized with the WorkgroupShare server.

**Note:** These folders will only appear once the user has installed the client software and has successfully synchronized.

The bottom table shows the access that this user has to other users' folders and public folders. For more information, see "Access Rights" on page 9.

## Personal Folders

When a user synchronizes Outlook with the WorkgroupShare server, the user's selected personal folders will appear in WorkgroupShare Administrator under the corresponding user entry.



Once these folders appear in WorkgroupShare Administrator, you may grant access to these folders for other users and groups. For more information, see "Granting Access to a Specific Folder" on page 10.

To add a personal folder for a user:

- 1 Right click on the user entry and select **New Folder** from the context menu. The New Folder wizard appears.
- 2 Enter a name for the folder in **Name**. This is the name of the folder that will appear in the user's Outlook folder list.
- 3 Select the folder type from **Type**.
- 4 Select the parent folder from **Parent**.
- 5 Click **Finish** to add the folder. The folder will automatically appear in the associated user's folder list without explicitly specifying access. If you want other users to be able to see this personal folder you must grant them access through WorkgroupShare Administrator. For more information, see "Granting Access to a Specific Folder" on page 10.

## Groups

### Adding a Group

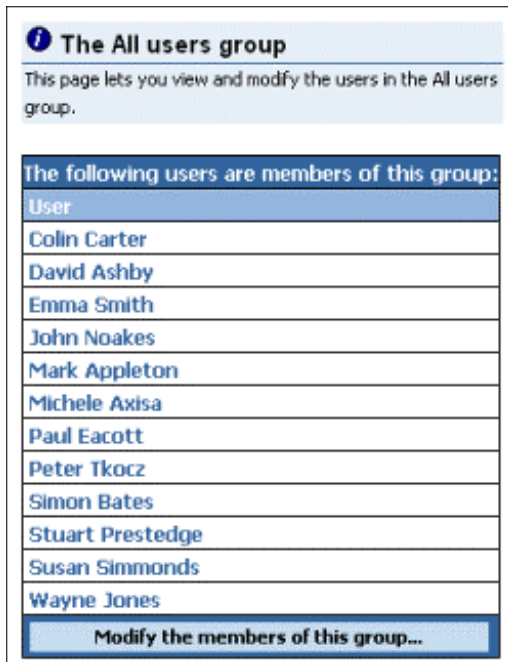
To add a new group:

- 1 Click the **New Group** toolbar button at the top of the WorkgroupShare Administrator window. The New Group wizard appears.

- 2 In **Name**, enter a name for the group.
- 3 Select a user that you wish to add from **User**, then click **Add**. Repeat this process for each user that you wish to become a member of the group.
- 4 Click **Finish** to save the group.

## The Group Details View

Once you have added a group, that group will appear in the left-hand list under the expanded **Groups** entry. You can show the group's details in the right-hand window by selecting the group in the left-hand list.



## Adding or Removing Members from a Group

To add or remove members from a group:

- 1 Click **Modify the members of this group**. The Group property sheet appears showing the Details page.
- 2 To remove users, select the appropriate members from the **Users** list, then click **Remove**.

- 3 To add a user to the group, select the appropriate user from the **User** list, then click **Add**.

## Public Folders

Public folders are folders that are created in WorkgroupShare Administrator and are made available to selected users and groups. A useful example of a public folder is a shared contacts folder, which gives all specified users access to the organization-wide list of contacts. Another example is a meeting room calendar, which lets all staff know when a meeting room is available or in use. When you create a public folder and give at least read access to a user, the folder will appear in the user's Outlook the next time they synchronize.

### Adding a Public Folder

To add a public folder:

- 1 Click the **New Public Folder** button in the toolbar at the top of the WorkgroupShare Administrator window. The New Folder wizard appears.
- 2 Enter a name for the public folder in **Name**. This is the name of the public folder that will appear in each granted user's Outlook folder list.
- 3 Select the folder type from **Type**.
- 4 If this folder is intended to be a sub folder of an existing public folder, select the parent folder from **Parent**.
- 5 Click **Finish** to add the public folder.

The next step is to grant access to the public folder. For more information, see “Granting Access to a Specific Folder” on page 10.

### The Public Folder Details View

Once you have added a public folder, that folder will appear in the left-hand list under the expanded **Public Folders** entry. You can show the public folder's details in the right-hand window by selecting the public folder in the left-hand list.

**Access to the Demo room Calendar folder**

This page lets you view and change the access granted to other users to the **Demo room Calendar** folder.

The following users have access to this folder:

User	Access
John Noakes	Create Access
Peter Tkocz	Read Access
Paul Eacott	Read Access
David Ashby	Read Access
Mark Appleton	Read Access
Colin Carter	Delete Access
Michele Axisa	Read Access
Emma Smith	Delete Access
Gianna Plumridge	Read Access

**Grant other users access to this folder...**

The view consists of one table which shows a list of users that have access to the folder. If you granted a group of users access to the folder, the members of the group are shown individually in this table. The access of each user is shown in the Access column. The access shown is the highest level access that the user has been granted. For example, if the user is part of a group which has been granted read access and the user has also individually been granted delete access, then the user will be shown with delete access.

## Access Rights

### Granting Access to all the Folders of a User

To grant access to all the folders belonging to a particular user:

- 1 Select the appropriate user in the left-hand pane of the WorkgroupShare Administrator window. The User Details view is shown in the right-hand window.
- 2 Click **Grant other users access to this user's folders**. The User property sheet is displayed showing the Access page.
- 3 To give another user or group access to all of this user's folders, select the user or group from the top drop down list and click the **Add** button.

- 4 The user will be added with the default Read Access. To change the access level, select the user(s) or group(s) from the list and select the appropriate access level from the drop down list.
- 5 Click **OK** to make the change.

The specified user or group will now have the appropriate access to all of the target user's folders.

## Granting Access to a Specific Folder

To grant access to a user's folder or to a public folder:

- 1 Select a user folder or a public folder in the left-hand pane of the WorkgroupShare Administrator window, then click **Grant other users access to this folder** in the right-hand pane.

**Access to the Calendar folder**

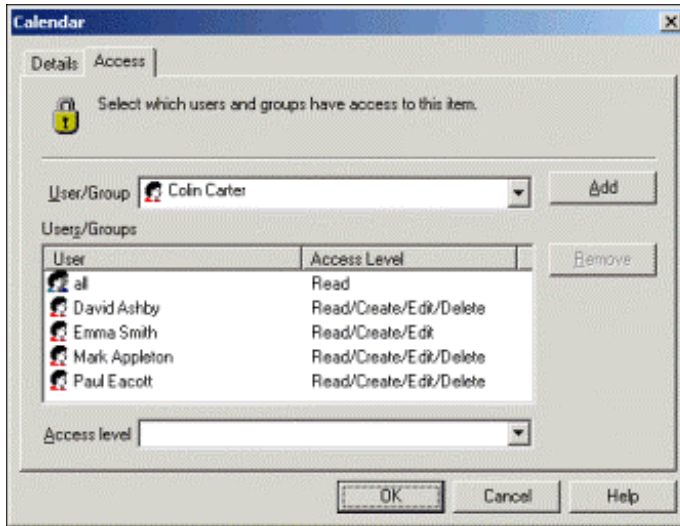
This page lets you view and change the access granted to other users to the **Calendar** folder.

The following users have access to this folder:

User	Access
Stuart Prestedge	Read
Mark Appleton	Read/Create/Edit/Delete
Wayne Jones	Read
Gianna Plumridge	Read
John Noakes	Read
Peter Tkocz	Read
Paul Eacott	Read/Create/Edit/Delete
David Ashby	Read/Create/Edit/Delete
Colin Carter	Read
Michele Axisa	Read
Susan Simmonds	Read
Emma Smith	Read/Create/Edit

**Grant other users access to this folder...**

- 2 The Folder property sheet is displayed, showing the Access page.



- 3 To give another user or group access to this folder, select the user or group from the top drop down list and click **Add** . The user will be added with the access shown in the Access Level drop down. If there is no selection in this drop down list then as soon as a user is added the selection will default to Read Access.
- 4 To change the access level, select the user(s) or group(s) from the list and select the appropriate **Access Level**. Click **OK** to make the change.

## Granting Access to a Group of Users

To grant certain people access to all the folders of each member of a group:

- 1 Right click on the group and select **Properties** from the context menu. The Group property sheet is displayed.
- 2 Select the **Access** page.
- 3 Select the user or group to whom you wish to give access to all the folders of each member of this group.
- 4 Select the appropriate **Access Level**. Click **OK** to save your changes.

## The Grant Access Wizard

The Grant Access wizard lets you grant access to one or more personal or public folders for a user or group of users.

To use the Grant Access Wizard:

- 1 Click the **Grant Access** button in the WorkgroupShare Administrator toolbar or select **Edit > Grant Access Wizard** to open the wizard.
- 2 Click **Next** on the Welcome page. The Access For dialog appears. This dialog lets you specify the user or group to which you are granting access.

If you wish to grant access for a specific user then select the **User** radio button and select the specific user from the drop down list. If you wish to grant access for a group of users, select the **Group** radio button and select the appropriate group from the corresponding drop down list.

- 3 Click **Next** to continue. The Access Level dialog appears.
- 4 Select the radio button corresponding to the appropriate access level and click **Next**. The Access To dialog appears. This dialog lets you specify what folder or group of folders you are granting access to.
  - If you select the **Personal folder belonging to** radio button, you must first select a user from the adjacent drop down list. The folder drop down list is then populated. You can select a specific folder from this list or you can select **<All folders>**, thus giving access to all the folders of the selected user.
  - If you select the **Public folder** radio button, you can select a specific public folder from the adjacent drop down list.
  - If you select the **Group** radio button, you can select a specific group from the adjacent drop down list. Doing this will enable the previously selected user or group to have the selected access to all the folders of all the people in this group.
- 5 Click **Next**. The summary page appears.
- 6 Review your choices. If they are correct, click **Finish** to grant the access.

## The Access Levels View

The Access Levels View gives an overall picture of what access has been granted to which users. This view can be accessed by clicking **Access Levels** in the Shortcut bar or from the left-hand list in WorkgroupShare Administrator.

Name	Access To	Access Level
Stuart Prestedge	Shared Contacts	Read Access
Simon Bates	Calendar (Stuart Prestedge)	Delete Access
Stuart Prestedge	Simon Bates	Read Access
John Noakes	Calendar (Stuart Prestedge)	Read Access
David Ashby	Calendar (Stuart Prestedge)	Read Access
Colin Carter	Calendar (Stuart Prestedge)	Create Access
Emma Smith	Calendar (Stuart Prestedge)	Delete Access
Gianna Plumridge	Calendar (Stuart Prestedge)	Delete Access
All users	Calendar (Stuart Prestedge)	Read Access
John Noakes	Demo room Calendar	Create Access
David Ashby	Demo room Calendar	Read Access
Mark Appleton	Demo room Calendar	Read Access
Colin Carter	Demo room Calendar	Delete Access
Emma Smith	Demo room Calendar	Delete Access
Gianna Plumridge	Demo room Calendar	Read Access
Peter Tkocz	Demo room Calendar	Read Access
Paul Eacott	Demo room Calendar	Read Access
Michele Axisa	Demo room Calendar	Read Access

The Access Levels view shows an entry for every access record that has been granted. Each entry specifies:

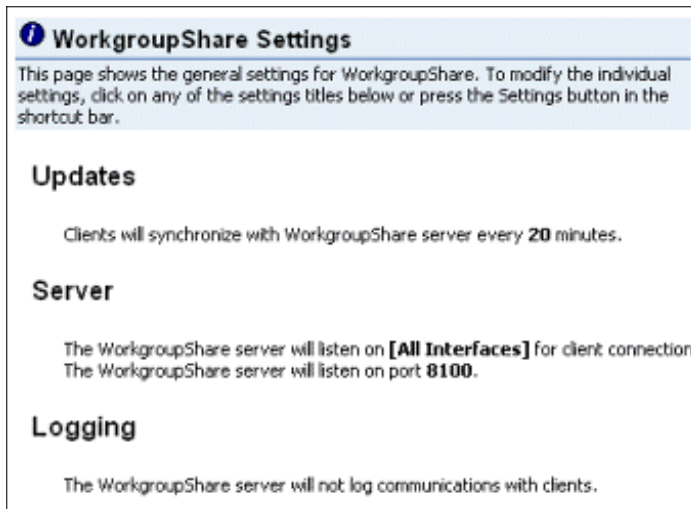
- the person or group for which access has been granted (in the **Name** column)
- the folder, user or group to which the access has been granted (in the **Access To** column)
- the level of access granted (in the **Access Level** column)

When viewing a user in the Access Levels view, the access level shown is the highest access level assigned specifically to that user. If a user has read access and is a member of a group with delete access, the user is shown in the Access Levels view with read access. To view the user's highest access level regardless of whether it is assigned directly or through membership in a group, consult the User Details View.

**Note:** The Access Levels View is useful for withdrawing access that you have granted. To withdraw access, simply select the relevant access entry and press the Delete key. The WorkgroupShare Administrator will ask you to confirm that you wish to delete the selected item(s).

## Settings

To modify WorkgroupShare settings, click the **Settings** button in the toolbar or select **Settings** in the left-hand pane of the WorkgroupShare Administrator window. The Settings Details View is shown in the right-hand pane.



The Settings Details View shows:

- how frequently each client will connect to the server to synchronize
- the interface and port on which the server is listening
- whether or not the server is configured to log all communications with the clients

## Client Update Frequency

You can change how frequently clients will connect to the server to synchronize. You entered an update frequency during the install process, but you can change it at any time.

To change this setting, right click **Settings** and select **Properties** from the context menu. The Settings property sheet is displayed showing the Updates page.

The default frequency is 20 minutes, but you can change this by entering the appropriate number of minutes in **Update Frequency**.

## Server Settings

The Server page shows the interface and the port on which the server listens for incoming client connections.

By default, the server listens on all interfaces; however, if the server computer has more than one IP address, then you can listen on a specific interface rather than all interfaces. To do this, select the appropriate IP address from **Interface**.

You may want to change this from [All Interfaces] if the server computer is connected to both the LAN and directly to the Internet (on different interfaces) and you only wish the server to listen on the local interface.

The default port that the server listens on is 8100. You can change this to another port simply by changing the number in the **Port field**.

**Note:** If you change either the Interface or the Port setting, you must re-run the client setup program on each computer in order to pick up the new settings.

## Logging

From the Logging page you can configure WorkgroupShare to log every transaction with each client to a log file.

Select the **Log Communications** check box, then click **OK** to save your changes. The log file will be written to C:\Program Files\WorkgroupShare\Data\Logs.

## Output Window

If you want to see the activity taking place on the server between each of the client computers then you can click the Output Windows button in the shortcut bar. When you click this, the Output window is shown in the right-hand window.

?	Time	IP Address	Description
+	09/10/2003 13:37	192.168.0.2	SELECTFOLDER 15
+	09/10/2003 13:37	192.168.0.2	OK Folder set
+	09/10/2003 13:37	192.168.0.2	GETITEMS
+	09/10/2003 13:37	192.168.0.2	OK List follows
+	09/10/2003 13:37	192.168.0.2	20 1065702816
+	09/10/2003 13:37	192.168.0.2	.
+	09/10/2003 13:37	192.168.0.2	SELECTFOLDER 8
+	09/10/2003 13:37	192.168.0.2	OK Folder set
+	09/10/2003 13:37	192.168.0.2	GETITEMS
+	09/10/2003 13:37	192.168.0.2	OK List follows
+	09/10/2003 13:37	192.168.0.2	18 1065112320
+	09/10/2003 13:37	192.168.0.2	.
+	09/10/2003 13:37	192.168.0.2	QUIT
+	09/10/2003 13:37	192.168.0.2	OK Closing connection
!	09/10/2003 13:37		Disconnected from 192.168.0.2
!	09/10/2003 13:38		Accepted connection from 192.168.0.2
+	09/10/2003 13:38	192.168.0.2	OK WorkgroupShare 1.1 server ready
+	09/10/2003 13:38	192.168.0.2	SERVERVERCAP
+	09/10/2003 13:38	192.168.0.2	OK 4 4
+	09/10/2003 13:38	192.168.0.2	SERVERGUID
+	09/10/2003 13:38	192.168.0.2	OK CBED4374-2C2F-413F-98B6-3E32B85FCD00
+	09/10/2003 13:38	192.168.0.2	USER: simon.bates
+	09/10/2003 13:38	192.168.0.2	OK Please supply password
+	09/10/2003 13:38	192.168.0.2	PASS *****
+	09/10/2003 13:38	192.168.0.2	OK 1 Welcome simon.bates
+	09/10/2003 13:38	192.168.0.2	SERVERTIME
+	09/10/2003 13:38	192.168.0.2	OK 1065703111

There are three tabs: **All**, **Output** and **Server**.

- The Output tab shows all the connection and disconnection activity, so that you can see exactly when a client started synchronizing and when it stopped synchronizing.
- The Server tab shows the exact communication between the server and the clients.
- The All tab shows a combination of both views.

If you wish to save the information from any of the tabs to a text file, you can right click inside the window and select **Output to file...** from the context menu.

# Client Installation Options

## Chapter 3

### Standard Installation

The client software must be installed on each computer that runs Microsoft Outlook and will be sharing or viewing shared information using WorkgroupShare.

The server installation program outputs a folder with the client installation; by default, this folder is located at:

```
C:\Program Files\WorkgroupShare\ClientSetup\
```

For the most efficient client install process, it is recommended that you share this folder across your network.

For more information on installing the WorkgroupShare client, see the Ipswitch Collaboration Suite WorkgroupShare Client Guide.

### Unattended Installation

Larger organizations who wish to roll out many clients may find it useful to take advantage of the unattended installation capability of the ClientSetup.exe program.

In order to run the ClientSetup.exe program in an unattended (silent) mode, you should invoke the ClientSetup.exe program, passing a command line argument which will be the name of the unattended setup file. The Unattended setup file will contain all the information the ClientSetup.exe program needs in order to successfully complete the installation. For example, if you invoke the client setup program as follows:

```
\\server\program files\workgroupshare\  
clientsetup\clientsetup.exe "c:\temp\  
unattendedsetup.dat"
```

then the ClientSetup.exe program will read the contents of the unattendedsetup.dat file and will not show any user interface and

#### In this Chapter

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Standard Installation

Unattended Installation

---

will silently install the client program. The format of the unattended setup configuration file is shown in the example file below:

```
////////////////////////////////////
//
// Filename:      UnattendedClientSetup.dat
//
// Description:  This file contains the settings to be
//              used for a client
//              using unattended setup of the
//              WorkgroupShare client
software.
//
////////////////////////////////////
// The following settings are used always
//
// This is the folder where the client program
// files are installed.
program-folder: C:\Program Files\WorkgroupShare Client
// This is the database ID of the user being installed
// on this client computer.
user-id: 1
// This is the login name of the user being installed
// on this client computer.
login-name: fred.smith
// This is the password of the user being installed on
// this client computer.
password: pwd

////////////////////////////////////
// The following settings are only used when there is
// no ClientSettings.dat file
//
// This is the computer name or IP address of the
// server computer.
server: 192.168.0.1
// This is the port that the WorkgroupShare server
// is listening on the server computer.
port: 8100
```

You will need to create a separate file for each user, since you must specify a separate user-id: field and a different login-name and password: field for every user. The user-id information for a particular user is the value of the ID field for that user's record in the Users table in the WorkgroupShare database. The same record holds the login-name and password values.

Provided that each client runs the ClientSetup.exe program from the \\server\program files\workgroupshare\clientsetup folder, your configuration file will not need to contain a

server: or a port: field, since this information is contained in the clientsettings.dat file, located in this folder. If you run the remote clientsetup.exe file, you will need to include the server: and port: fields, in order to provide ClientSetup.exe with this information.

The clientsetup.exe filename command line can be entered into the users startup scripts so that the WorkgroupShare client is automatically installed the next time they start their computer.