



**Workshare Compare 8**  
User Guide

## Company Information

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Workshare Compare 8 User Guide

Workshare Ltd. (UK)  
20 Fashion Street  
London  
E1 6PX  
UK

Workshare Inc. (USA)  
625 Market Street, 15<sup>th</sup> Floor  
San Francisco  
CA 94105  
USA

Workshare Website: [www.workshare.com](http://www.workshare.com)

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# Chapter 1. Introducing Workshare Compare

This chapter introduces Workshare Compare, providing an overview of how it works as well as a summary of the key features and benefits. It includes the following sections:

- **What is Workshare Compare?**, below, introduces Workshare Compare.
- **Features and Benefits**, page 8, describes the key features and benefits of Workshare Compare.
- **Terms and Concepts**, page 9, introduces the common terms and concepts used in Workshare Compare and in this guide.

## What is Workshare Compare?

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Workshare Compare is a document comparison tool designed to make the process of editing and revising documents as fast and efficient as possible. Workshare Compare enables you to compare documents – the original document and the modified document – and produce a comparison (Redline) document, enabling you to instantly see any differences between them.

In one view, you can see both the original documents and the comparison document. You can compare a document against another single document or against multiple documents and see the Redline document for each comparison in a different tab.

You can compare Microsoft Word documents (DOC/DOCX files), RTF files and PDF files. Within a Microsoft Word file, you can compare all content including images, tables and embedded Microsoft Excel tables.

For users who have a DMS, or work with NetDocuments or SharePoint, Workshare Compare provides access to version information stored in the DMS, NetDocuments or SharePoint. Understanding differences between one version of a document and the next is a critical function when editing and reviewing documents in multi-user environments. The Workshare Compare module utilizes Workshare DeltaView - the market-leading and most advanced comparison engine in the market today, to perform comparisons accurately and seamlessly. Comparison results are displayed within Microsoft Word or in a separate Workshare Compare window.

Workshare Compare's fast, accurate and reliable document comparison capabilities enable you to quickly compare even the most difficult and complex documents. You can review the Redline document by navigating between the changes. To make the review easier, you can select different rendering sets to determine how the changes are highlighted within the document. A statistical summary at the end of the Redline document enables you to precisely match the document changes.

In addition, Workshare Compare preserves the technical integrity and style of the document – preventing your document from becoming corrupt or inadvertently incorporating foreign formatting or style. This not only benefits you through higher document quality, but also through increased productivity as well as reducing stress at deadlines.

Alert and Compare is the ability of Workshare Compare to automatically detect that a received attachment is a changed version of an original document sent previously. When a user sends a document to a recipient and the recipient edits the document and sends it back to the user, Workshare Compare can automatically detect that the received attachment is a changed version of the original document. The user can then launch a comparison of the two documents from Microsoft Outlook and view the Redline document in Workshare Compare.

## Workshare Compare Functionality

Workshare Compare provides sophisticated functionality that is convenient and accessible, enabling users to move smoothly between tasks and work rapidly to manage changes. Workshare Compare is a standalone application and additionally Workshare Compare integrates with Microsoft Word to display a simple and intuitive panel within Microsoft Word enabling users to take advantage of available Workshare Compare functionality from within the application.

**Note:** *Workshare Compare can be installed without Microsoft Word integration. In this case, the comparison functionality is only available from the Workshare Compare application.*

The Workshare Panel is task-oriented, guiding users through their document tasks in a clear, step-by-step format.

Workshare Compare has also made key functionality of the DMS/CRM available from the Microsoft Word environment. For example, Workshare Compare provides a list of the DMS/CRM versions of a document, enabling the comparison of document versions.

## Features and Benefits

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Workshare Compare is powerful comparison software. Its key benefits include:

- **Advanced Document Comparison**

Compare one document against multiple modified versions or revisions within context of one another. Workshare Compare utilizes an industry-leading document comparison engine to excel at long and complex documents as well as comparing auto-numbered paragraphs, font changes and complicated formatting, even in tables.
- **Compare One Document to Multiple Versions**

Compare more than two documents at one time including comparing Word-to-Word, PDF-to-PDF, Word-to-PDF and WordPerfect files.
- **Compare PDF Documents**

Compare PDF documents. The differences between two versions of a PDF document are automatically highlighted, including text and images, so you can quickly and easily identify what has changed. Workshare Compare can compare both regular text-based PDF files and image-based PDF files that originate from scanned documents.
- **Comparison Speed**

Run a document comparison that is 8x-10x faster than the original DeltaView comparison engine.
- **Alert and Compare - Redlines from Outlook**

Generate a Redline document from Microsoft Outlook. Alert and Compare is the ability of Workshare Compare to automatically detect that a received attachment is a changed version of an original document sent previously. When a user sends a document to a recipient and the recipient edits the document and sends it back to the user, Workshare Compare can automatically detect that the received attachment is a changed version of the original document. The user can then launch a comparison of the two documents from Microsoft Outlook and view the Redline document in Workshare Compare.

- **Multiple Comparison Interfaces**

Compare email attachments directly from your email application, utilize the standalone document comparison tool from the desktop without launching Microsoft Word, or work within Microsoft Word to compare documents without having to learn a new software application.

- **Unicode Compliance**

Complete support for Unicode language documents and operating systems.

- **Extend Your Document Management System**

Leverage Workshare Compare with your existing DMS/CRM, including Autonomy iManage, Open Text, NetDocuments, Worldox and SharePoint. For example, Workshare Compare provides a list of the DMS versions of a document, enabling the comparison of document versions.

## DMS/CRM Integration

Workshare Compare can integrate with your DMS or CRM as well as SharePoint to provide comparison and collaboration functionality.

### SharePoint

Workshare Compare integrates fully with SharePoint so that users can select documents from SharePoint when comparing.

To integrate with SharePoint, Workshare Compare must be installed with the SharePoint integration selected and your SharePoint server details must be configured in the Workshare Configuration Manager. Refer to your system administrator for further information.

### NetDocuments

Workshare Compare integrates with NetDocuments, a cloud-based document storage solution, to enable comparison of documents stored in NetDocuments.

You can browse in NetDocuments for documents or versions to compare as well as save comparisons (Redline documents) back into NetDocuments. Comparison of documents stored in NetDocuments is performed from Workshare Compare or from the Workshare Panel in Microsoft Word. You cannot initiate a comparison from NetDocuments.

To integrate with NetDocuments, Workshare Compare must be installed with the NetDocuments integration selected and you log in to your NetDocuments account through the Workshare Configuration Manager (**Integrations > NetDocuments** category). Refer to your system administrator for further information.

### Autonomy iManage

Workshare Compare integrates fully with Autonomy iManage so that users can select documents from Autonomy iManage when comparing. Additionally, the integration provides access to the Workshare Compare functionality from Autonomy iManage using right-click options.

To integrate with Autonomy iManage, Workshare Compare must be installed with the Autonomy iManage integration selected and your Autonomy iManage server details must be configured in the Workshare Configuration Manager. Refer to your system administrator for further information.

## Open Text

Workshare Compare integrates fully with Open Text so that users can select documents from Open Text when comparing. Additionally, the integration provides access to the Workshare Compare functionality from Open Text using right-click options.

To integrate with Open Text, Workshare Compare must be installed with the Open Text integration selected. Refer to your system administrator for further information.

## Worldox

Workshare Compare integrates fully with Worldox so that users can select documents from Worldox when comparing. Additionally, the integration provides access to the Workshare Compare functionality from Worldox using right-click options. When comparing, users can browse in Worldox for documents or versions to compare as well as save comparisons (Redline documents) back into Worldox. Comparison of Worldox documents is performed from Workshare Compare, from the Workshare Panel in Microsoft Word or from within Worldox.

To integrate with Worldox, Workshare Compare must be installed with the Worldox integration selected. Refer to your system administrator for further information.

## Terms and Concepts

The following terms and concepts are regularly used in Workshare Compare and throughout the documentation:

Term	Definition
<b>Document Management System (DMS)</b>	A system that enables companies to centralize the management, storage, retrieval and distribution of documents. Furthermore, it enables a user to monitor and control modifications to a document while it is worked on by others.
<b>Modified Document</b>	The document that is compared against the original document. The modified document is usually a copy of the original document that has been altered, perhaps by another user.
<b>Original Document</b>	The document at the center of activity. This document can be compared against other documents or sent for review. The original document always stays in the DMS.
<b>Redline Document</b>	The document that results from a comparison of two documents, for example, the original document and an earlier version of the original document, or the original document and a response. The Redline document indicates the changes/differences between the two compared documents.
<b>Rendering Set</b>	Rendering sets define how Workshare Compare represents changes in a document. For example, inserted text is shown in <u>blue with double underline</u> and deleted text is shown in <del>red with strikethrough</del> . These display preferences can be amended by the user.

## Chapter 2. Getting Started

This chapter describes the Workshare Compare working environment and provides an overview of the tools available. It includes the following sections:

- **Launching Workshare Compare**, below, describes how to access Workshare Compare functionality.
- **Workshare Panel**, page 11, describes the Workshare Panel and the options available from it.
- **Workshare Tab**, page 12, describes the options available in the Workshare tab.
- **Enabling Workshare Compare Functionality**, page 13, describes how to ensure that Workshare Compare functionality is fully enabled.

### Launching Workshare Compare

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Workshare Compare functionality is available from a standalone application or from within Microsoft Word.

The Workshare Compare standalone application can be accessed in the following ways:

- Double-click the Workshare Compare icon on the desktop.
- From the Start menu, select **Programs, Workshare, Workshare Compare**.

The user interface of the Workshare Compare Standalone application is described in Chapter 4.

Within Microsoft Word, the Workshare Compare functionality can be accessed from the Workshare Panel or tab. After you have installed Workshare Compare, the Workshare tab is added to the Ribbon in Microsoft Word. Click **Toggle Panel** in the Workshare tab and the Workshare Panel is displayed down the left side of the window.

***Note:** The addition of Workshare Compare does not affect the standard functionality of Microsoft Word. You can operate this application as usual and access the Workshare Compare functionality as required.*

***Note:** Workshare Compare can be installed without Microsoft Word integration. In this case, the Workshare Panel and Workshare tab/menu are not available. The Workshare comparison functionality is only available from the Workshare Compare application.*

Workshare Compare functionality can also be accessed in the following ways:

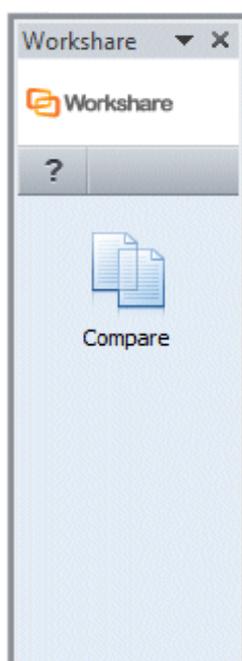
- Right-click closed Microsoft Word or PDF documents and select **Compare with Workshare**.
- Click the **Compare Attachment with Workshare** button when you receive an email that contains an attachment. Refer to Comparing an Attachment for further information.

### Workshare Panel

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The Workshare Panel, displayed by default down the left side of the Microsoft Word window, provides access to Workshare Compare functionality and is your guide, prompting you through each step of any given process.

You can display/hide the Workshare Panel by clicking **Toggle Panel** in the Workshare tab, **Options** group.



The Home page of the Workshare Panel, shown here, provides quick access to the functionality of Workshare Compare, as follows:

**Compare:** Enables you to compare a document with a previous version of the same document or with another document. Refer to [Overview – Comparing Documents from Within Microsoft Word](#) and [Overview - Comparing Documents Using Workshare Compare](#) for further information.

**Tip!** The Workshare Panel can float over other windows. Click and drag the title bar of the Panel to move it to a different location.

There is a Help button  displayed at the top of every page in the Workshare Panel that provides access to online help as well as a close button that enables you to close/hide the Workshare Panel. Additionally, at the top of all pages of the Workshare Panel except the Home page, the following links are displayed:

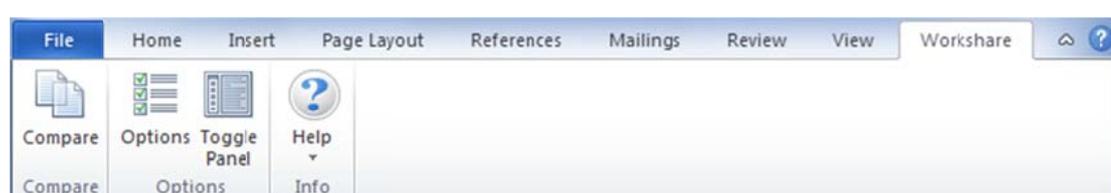


Return to the Home page of the Workshare Panel.



Return to the previously displayed page of the Workshare Panel.

## Workshare Tab



The *Workshare* tab includes the following options:

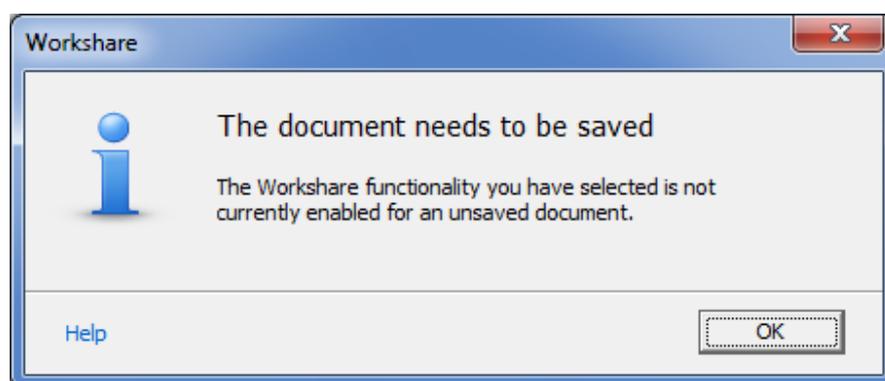
Group	Item	Description
Compare	Compare	Enables you to compare a document with a previous version of the same document or with another document. Refer to <a href="#">Overview – Comparing Documents from Within Microsoft Word</a> and <a href="#">Overview - Comparing Documents Using Workshare Compare</a> for further information.
Options	Options	Enables you to configure system parameters in the Workshare Configuration Manager. Refer to <a href="#">Introducing the Workshare Configuration Manager</a> for further information.

Group	Item	Description
	<b>Toggle Panel</b>	Displays/hides the Workshare Panel down the left side of the Microsoft Word window. The Workshare Panel is displayed with its Home page open. Refer to Workshare Panel.
<b>Info</b>	<b>Help</b>	Provides access to version, copyright and license information about Workshare Compare.

## Enabling Workshare Compare Functionality

You must be working on a *saved* Microsoft Word document in order for the Workshare Compare functionality to be fully enabled.

If you are working in Microsoft Word on an unsaved document, Workshare Compare functionality is not fully enabled. If you select **Compare**, the following message is displayed:



If you open a document directly from an email, it is a temporary document that is saved in a temporary location and the **Compare** functionality is enabled.

## Chapter 3. Comparing Documents from within Microsoft Word

This chapter describes how to compare documents using Workshare Compare from within Microsoft Word. It includes the following sections:

- **Overview**, below, introduces the comparison functionality of Workshare Compare.
- **Performing a Comparison**, page 15, describes how to compare a document against an earlier version of the document or against a different document, and describes the Redline document – the result of the comparison.
- **Working with the Redline Document**, page 18, describes the tools available to you when working with the compared (Redline) document after a comparison

For information about comparing documents using Workshare Compare, refer to Overview - Comparing Documents Using Workshare Compare.

### Overview – Comparing Documents from Within Microsoft Word

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Workshare Compare enables you to compare two documents within Microsoft Word and instantly see any differences between them. You can compare a document against an earlier or later version of the same document or against a different document. Documents can be stored in your DMS or CRM, in SharePoint, locally or on your network. You can compare any of the following formats:

- DOC
- DOCX
- PDF
- RTF
- TXT

Comparison results are displayed in a Redline document within Microsoft Word with changes clearly marked. For example, ~~deleted text is red and struck through~~ and added text is blue and double underlined. You can compare all content including images, tables and embedded Microsoft Excel tables. In one view, you can see both the original document and the comparison document.

### PDF Comparison

Workshare Compare can compare both regular text-based PDF files and image-based PDF files that originate from scanned documents. Workshare Compare compares regular PDFs by converting them to RTF before performing a comparison. 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 and then produce an RTF file.

**Note:** Workshare Compare can perform OCR on the following languages: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian, Polish, Portuguese, Spanish, Swedish and Russian.

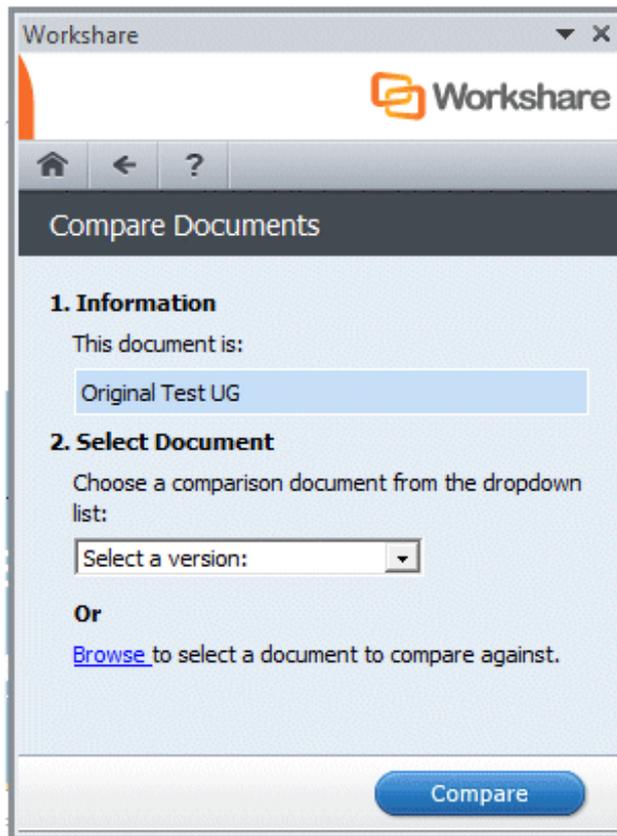
## Performing a Comparison

You can compare your original document against a previous version of the document or against another document entirely. You can also compare any two versions of a document. For example, there may be ten versions of a document in your DMS. You can open version 3 and compare it against version 5.

**Note:** You cannot compare secure PDFs, meaning PDF files with security settings configured.

### To compare documents:

1. Click **Compare** in the *Workshare* tab, **Compare** group or click **Compare** in the Home page of the Workshare Panel. The Compare page is displayed as follows:

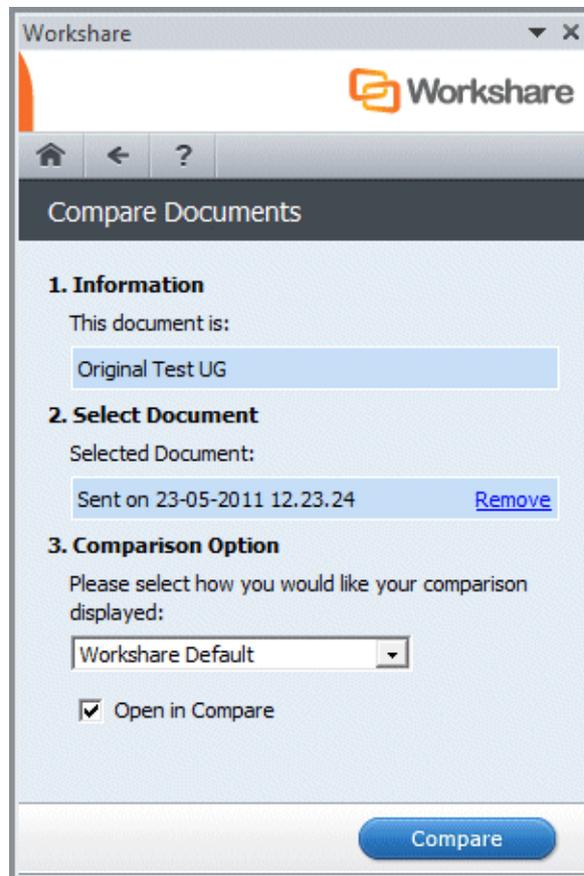


**Note:** The Workshare Panel displays slightly differently depending on whether you are working with a document saved in your DMS/CRM.

2. Select the document against which you want to compare the current document in one of the following ways:
  - Select a version of the document from the dropdown list. When the document has previous versions, the dropdown list is a list of other versions of the document. When the document has no versions but has previously been sent for review, the list is a list of previously sent out versions of the document. These “versions” are actually revisions, which are created when the document is sent for review if the document has changed since the last time it was sent.
  - Click **Browse** and select a document from your DMS/CRM or locally.

**Note:** When Workshare is integrated with your DMS/CRM, for example NetDocuments, the Open from NetDocuments dialog is displayed. Clicking Cancel will enable you to select a comparison document locally.

The Compare page is displayed as follows:



The screenshot shows a window titled "Workshare" with a navigation bar containing a home icon, a back arrow, and a question mark. Below the navigation bar is a dark header with the text "Compare Documents". The main content area is divided into three sections:

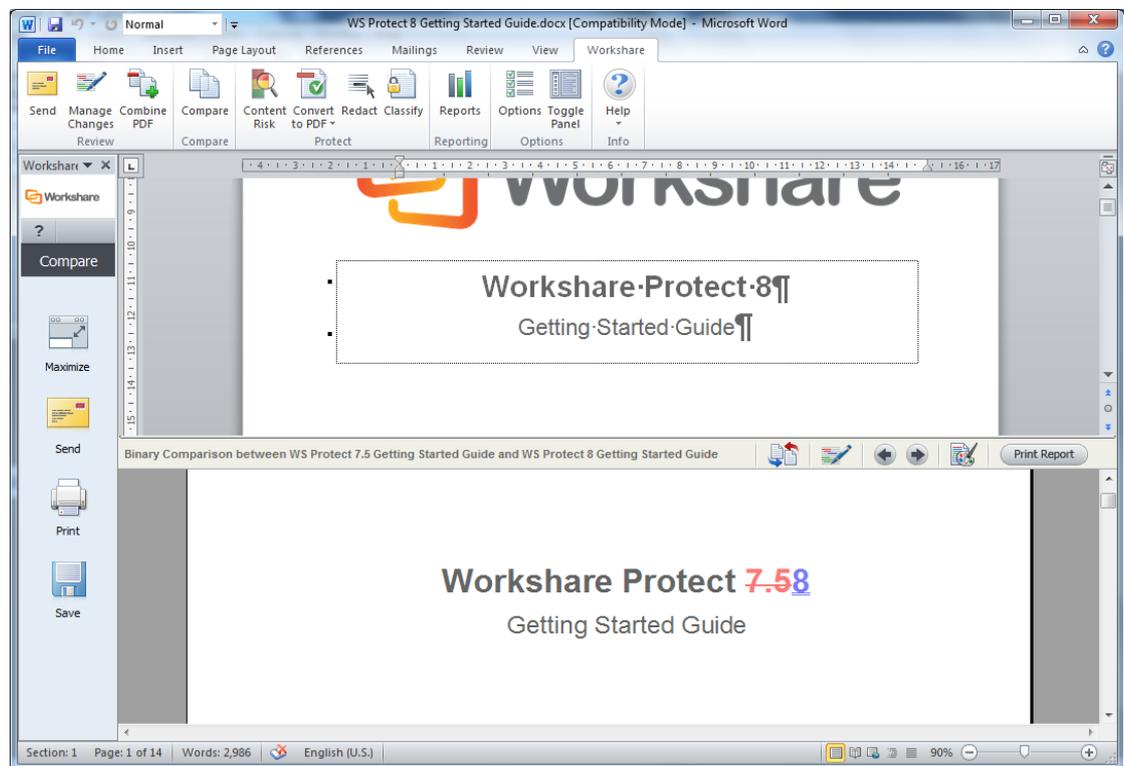
- 1. Information**  
This document is:  
Original Test UG
- 2. Select Document**  
Selected Document:  
Sent on 23-05-2011 12.23.24 [Remove](#)
- 3. Comparison Option**  
Please select how you would like your comparison displayed:  
Workshare Default (dropdown menu)  
 Open in Compare

A blue "Compare" button is located at the bottom right of the dialog box.

**Tip!** If you want to change the selected document, click the **Remove** link and select a different document.

3. To show the comparison in Microsoft Word, *deselect* the **Open in Compare** checkbox. If this checkbox is selected, the comparison will be displayed in the Workshare Compare window. Refer to Overview - Comparing Documents Using Workshare Compare for information about comparing documents using Workshare Compare.
4. If required, select a rendering set from the dropdown list in the **Comparison Options** area to determine how the comparison document is displayed. For example, deleted text could be shown in **red with a strikethrough**. Click **Edit Rendering Set** if you want to modify rendering sets. For further information about rendering sets, refer to Introducing Rendering Sets.
5. Click **Compare**. Workshare Compare performs the comparison. A progress bar indicates the progress of the compare process.

When the comparison is complete, the results of the comparison are displayed in a comparison (Redline) document in the lower right area. The original document remains open in the upper right area.



The Redline document clearly displays the changes between your original document and the selected document. Changes are marked according to the rendering set applied to the comparison. For example, ~~deleted text is red and struck through~~ and added text is blue and double underlined.

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

Moving between changes in the Redline document using the arrow keys scrolls to the change and highlights it in both the Redline document and the original document.

You can continue working in the original document as required. At any time, you can again compare the original document with a previous version or another document by clicking **Maximize** in the Workshare Panel and repeating the procedure described above.

Click **Maximize** and then **Home** in the Workshare Panel to close the Redline document and return to the Home page of the Workshare Panel.

## Working with the Redline Document

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After a comparison, you can navigate between the changes in the Redline document, switch the original and modified documents, import the changes into the original document, save the Redline document, print it or email it using the tools available in the toolbar located above the Redline document and the options provided in the Workshare Panel. These options are described in the following pages.

### Navigating Between Changes

After performing a comparison, you can review the Redline document (the result of the comparison) and consider the changes between the two documents. You can move between changes in the Redline document by jumping from change to change.

Click  in the toolbar above the Redline document to move to the previous change and highlight the entire change in the Redline document and in the original document.

Click  in the toolbar above the Redline document to move to the next change and highlight the entire change in the Redline document and in the original document.

### Edit the Rendering Set

You can edit the way the changes are presented in the Redline document by editing the rendering set applied to the comparison.

Click  in the toolbar above the Redline document. For further information about rendering sets, refer to [Introducing Rendering Sets](#).

### Swapping the Source Documents

You can re-run a comparison exchanging the original document for the modified document and the modified document for the original document. For example, if Document A was the original document and Document B was the document you selected to compare Document A against, Workshare Compare compares Document A to Document B and presents the changes made to Document A.



Click  in the toolbar above the Redline document to swap the original and modified documents so that Document B is now the original document and Document A is the document selected to compare Document B against. Workshare Compare automatically re-runs the comparison, comparing Document B to Document A, and presents the changes made to Document B.

## Importing Changes into the Original Document

You can import the changes detailed in the Redline document into the original document.



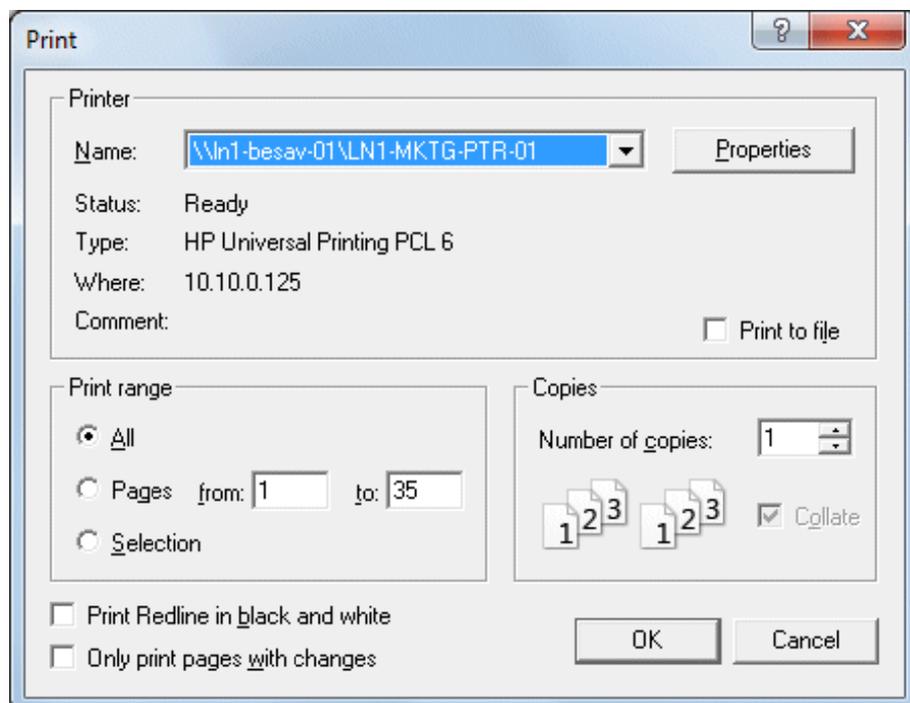
Click  in the toolbar above the Redline document. The changes detailed in the Redline document are imported into the original document. The original document and the Manage Changes page of the Workshare Panel are displayed. You can then select to incorporate the changes into the original document as required. Refer to **Error! Reference source not found.** for further information.

## Printing Redline Documents

You can print the Redline document at any time.

**To print a Redline document:**

1. Click **Print** in the Workshare Panel or click  in the toolbar above the Redline document. The *Print* dialog is displayed.



2. Select from the standard print options in the usual way.

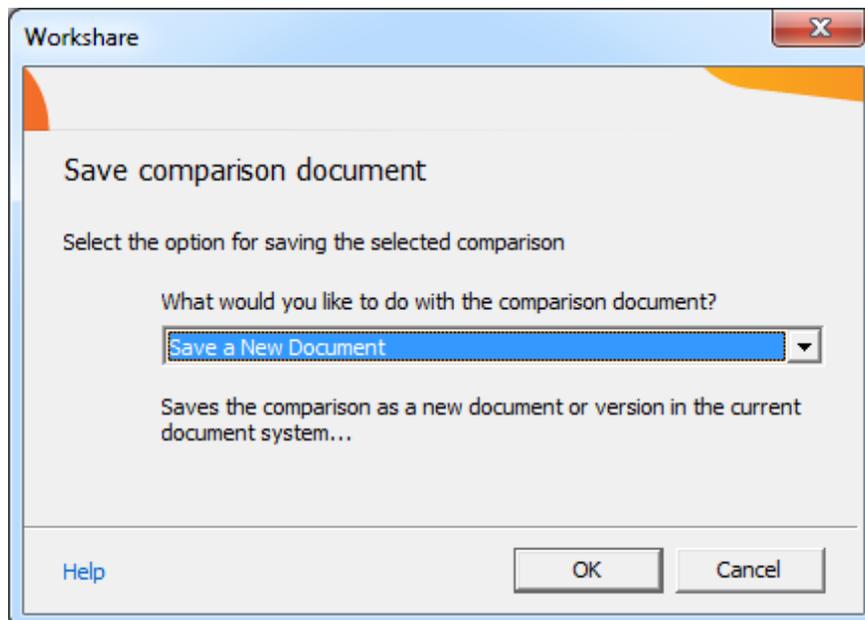
3. If you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as colored text may not appear clearly when printing in black and white.
4. If you only want to print pages of the Redline document that include changes, select the **Only print pages with changes** checkbox.
5. Click **OK**.

## Saving Redline Documents

You can save the Redline document as an RTF or Microsoft Word file to your DMS/CRM, SharePoint or locally. The following procedure describes how to save to iManage 8 as an example.

### To save a Redline document:

1. Click **Save** in the Workshare Panel. The *Save comparison document* dialog is displayed.



**Note:** If you are not working with a DMS/CRM or SharePoint, the *LocalStore Save As* dialog is displayed.

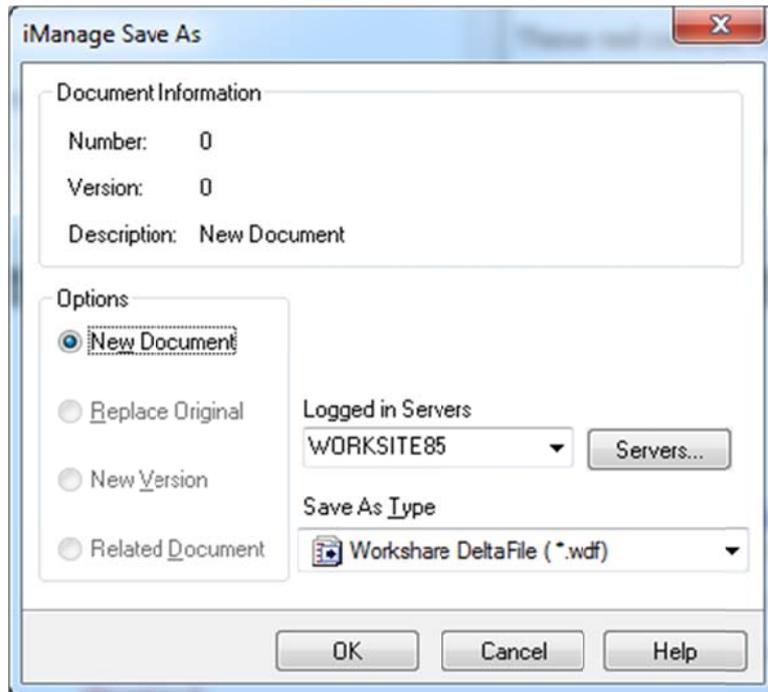
**Tip!** If you are working with a DMS/CRM or SharePoint but both documents compared are local documents, then you can press the **Shift** key while clicking **Save** and the *LocalStore Save As* dialog is displayed.

2. From the dropdown list, select how you want to save the document from the following:
  - **Save a New Document**
  - **Attach/Relate to Original Document** (Only available when using the iManage or DOCS Open integration and the original document is from iManage or DOCS Open)
  - **Attach/Relate to Modified Document** (Only available when using the iManage or DOCS Open integration and the modified document is from iManage or DOCS Open)

**Note:** The modified document is the current document open in Microsoft Word; the original document is the document selected to compare against the current document.

- Click **OK**. The *iManage Save As* dialog is displayed.

**Note:** If you press the **Shift** key while clicking **OK**, the *LocalStore Save As* dialog is displayed and you can save the Redline document locally.



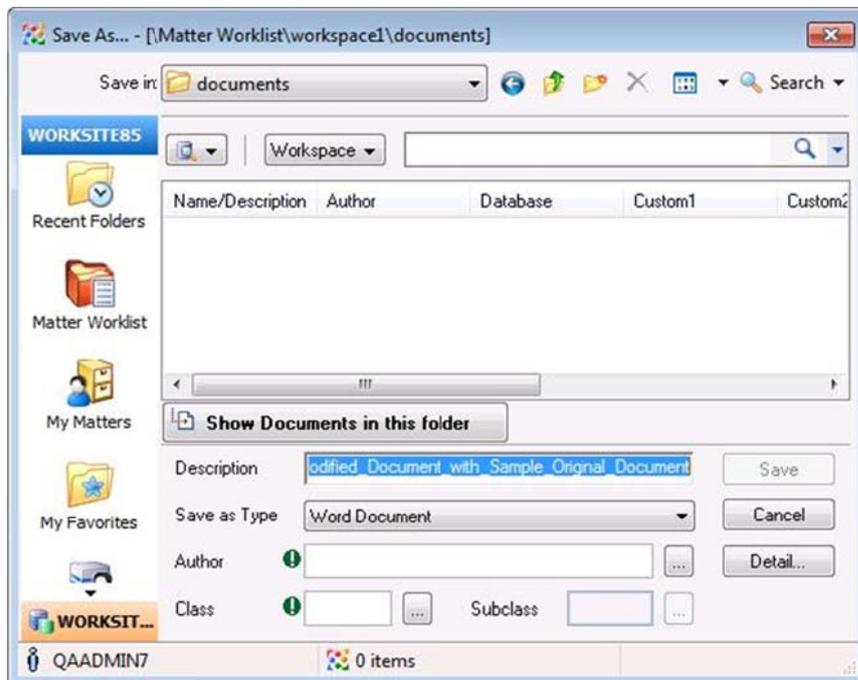
**Note:** If you click **Cancel** in this dialog, a message is displayed asking if you would like to save the Redline document locally.

The **Document Information** area provides information about the currently open Redline document, if it is already saved. This information includes the DMS document number, the version number and a description. If the Redline document is a new document these fields are empty.

- In the **Options** area, select the way in which you want to save the Redline document from the following:

- |                         |   |
|-------------------------|---|
| <b>New Document</b>     | To save the Redline document as a completely new document. If the Redline document has not been saved before and you selected <b>Save a New Document</b> in the <i>Save Comparison</i> dialog, this is the only option enabled. |
| <b>Replace Original</b> | This option is not enabled.   |
| <b>New Version</b>      | To save the Redline document as a new version. This option is only enabled if the Redline document has been saved before and you selected <b>Save a New Document</b> in the <i>Save Comparison</i> dialog.                      |

- Related Document** (IMange DMS only) To save the Redline document as a related document (related to the original or modified document). This option is only enabled if you selected **Attach/Relate to Original/Modified Document** in the *Save Comparison* dialog.
  - New SubVersion** (Hummingbird DMS only) To save the Redline document as a new sub-version. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Comparison* dialog.
  - Attachment** (Hummingbird DMS only) To save the Redline document as an attachment to the original or modified document. This option is only enabled if you are attaching a Redline document to the original or modified document, meaning you selected **Attach/Relate to Original/Modified Document** in the *Save Comparison* dialog.
5. (IMange DMS only) From the **Logged in Servers** dropdown list, select which server you would like to use. This list is a list of previously logged in servers. If you want to log in to a different server, click **Servers**.
  6. From the **Save As Type** dropdown list, select the format for the saved file from the following:
    - Word Document (\*.doc)** Saves the Redline document as a Microsoft Word file. The source documents are not saved.
    - Rich Text Format (\*.rtf)** Saves the Redline document as an RTF file. The source documents are not saved.
  7. Click **OK**. In IMange 8, the following dialog is displayed:



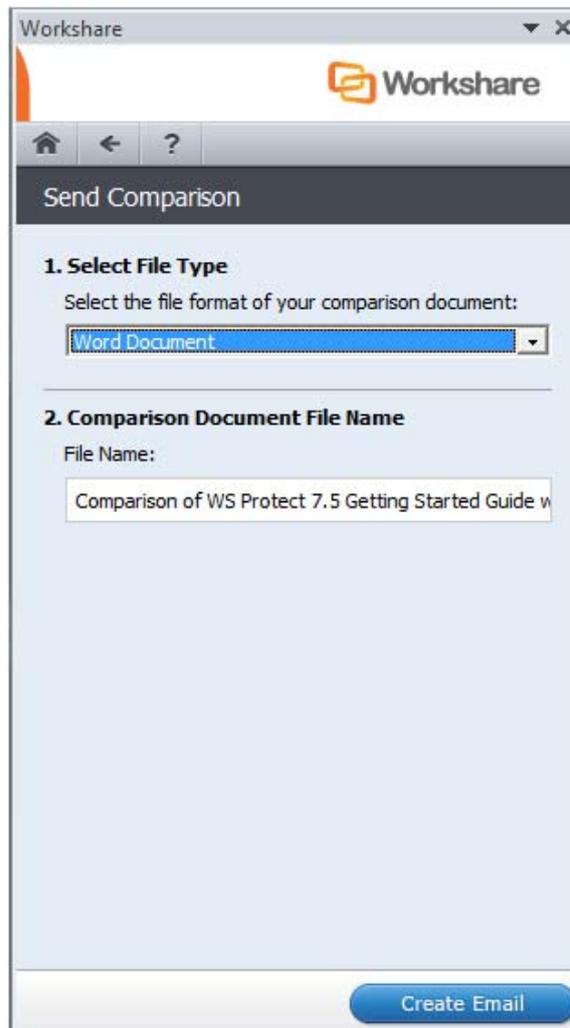
8. Complete the fields as required and click **OK**. The Redline document is saved to the specified location.

## Sending Compared Documents by Email

You can send the Redline document (in Microsoft Word format or as a PDF) as an email attachment.

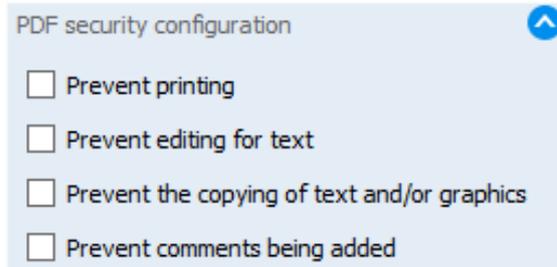
### To send a Redline document by email:

1. Click **Send** in the Workshare Panel. The Send Comparison page is displayed as follows:

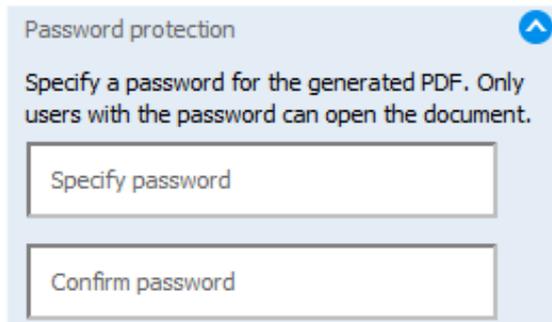


2. Select the format in which you want to send the comparison from the following:
  - **Word Document:** The comparison will be sent as a Microsoft Word file.
  - **PDF (.pdf):** The comparison will be sent as a PDF file.
  - **PDF/A (.pdf):** The comparison will be sent as a PDF/A file.

3. If you selected **PDF** in step 2, you can expand the **PDF security configuration** section to set PDF security options.

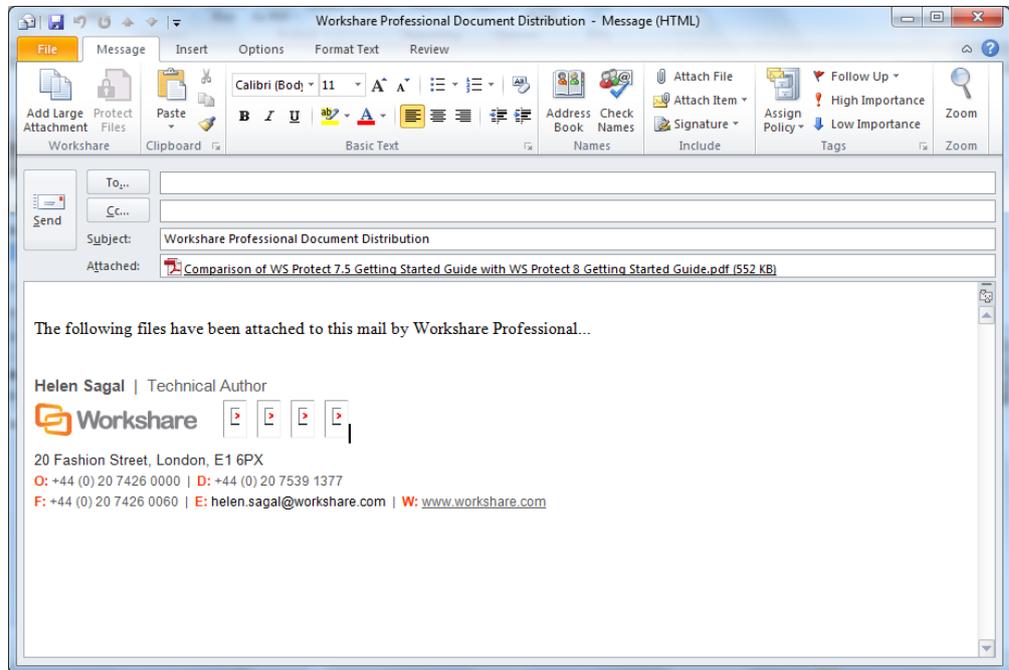


4. Select one or more of the security options as required:
  - **Prevent printing:** Prevents recipients from printing the PDF document.
  - **Prevent editing of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
  - **Prohibit copying of text and/or graphics:** Prevents recipients from copying graphics or text directly from the PDF document.
  - **Prevent comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.
5. If you selected **PDF** or **PDF/A** in step 2, you can expand the **Metadata cleaning** section and click **Cleaning options** to specify what hidden data to remove before converting it to PDF.
6. Select hidden data elements as required. For a full description of all the hidden data elements, refer to ***Error! Reference source not found.***, for further information.
7. Click **OK**.
8. If you selected **PDF** in step 2, you can expand the **Password protection** section to protect the PDF.



9. If required, set a password to protect the PDF by entering the password twice in the relevant fields. When a password is specified, the recipient can only open the PDF after entering this password.
10. Enter the name for the Redline document in the **File Name** field. By default the Redline document is called **Comparison of [name of modified document] with [name of original document]**.

11. Click **Create Email**. An email message window is displayed with the comparison in the specified format as an attachment. (If the PDF file type was selected, a progress dialog indicates the progress of the conversion to PDF.)



12. Enter the recipient(s) name and any other text you want to include and click **Send**. The file is sent to the specified recipients.

**Note:** Depending on the configuration of Workshare, an email protection dialog may be displayed before the document is sent. Refer to **Error! Reference source not found.** for further information.

## Chapter 4. Comparing Documents Using

## Chapter 4. Comparing Documents Using Workshare Compare

This chapter describes Workshare Compare, a standalone application that enables you to compare two documents. It includes the following sections:

- **Overview**, below, introduces the Workshare Compare application.
- **Performing Comparisons**, page 28, describes how to compare a document against an earlier version of the document or against a different document using Workshare Compare.
- **Workshare Compare Main Window**, page 36, describes the Workshare Compare environment and provides an overview of the functionality available.
- **Working with Redline Documents**, page 54, describes the tools available to you when working with the compared (Redline) document after a comparison.
- **Alert and Compare - Generating Redlines in Outlook**, page 75, describes how to generate a Redline from within Microsoft Outlook.
- **Comparing an Attachment**, page 77, describes how to compare attachments in Workshare Compare.

For information about comparing documents using Workshare Compare from within Microsoft Word, refer to Overview – Comparing Documents from Within Microsoft Word.

**Note:** This chapter describes how to perform comparisons using the Ribbon interface of Workshare Compare. If you are more comfortable with the Classic interface, click **Classic View** in the View Ribbon.

### Overview - Comparing Documents Using Workshare Compare

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The Workshare Compare application compares documents – the original document and the modified document – and produces a comparison (Redline) document, enabling you to instantly see any differences between them. In one view, you can see both the source documents and the resulting Redline document. You can compare an original document against several different modified documents and see the Redline document for each comparison in a different tab. Documents can be stored in your DMS or CRM, locally or on your network.

You can compare any of the following file formats:

DOC      DOCX      PDF      RTF      TXT

Workshare Compare's powerful engine accurately and reliably displays document changes and eliminates the need to check the changes manually. All content is compared including images, tables and embedded Microsoft Excel tables. You can review the Redline document by navigating between the changes. To make the review easier, you can customize how the changes are highlighted within the document. A statistical summary at the end of the Redline document enables you to precisely match the document changes.

There are several types of comparison available, as follows:

- **Standard:** Workshare Compare performs a regular comparison.
- **Fast:** When comparing a .DOC file against another .DOC file, Workshare Compare performs a binary comparison which is faster than a standard comparison because it is comparison at the binary level.

When comparing a .DOCX file against another .DOCX file, Workshare Compare performs a faster comparison by converting the documents to RTF faster than MS Word.

**Notes:**

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

*The **Fast** option is only available for DOCX files if the **Enable fast comparison for DOCX files** 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 performs 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.

## PDF Comparison

Workshare Compare can compare both regular text-based PDF files and image-based PDF files that originate from scanned documents. Workshare Compare compares regular PDFs by converting them to RTF before performing a comparison. 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 and produce an RTF file.

PDF files that originate from scanned documents may include:

- PDF files generated from files that have been scanned: OCR (Optical Character Recognition) has already been used to translate images of typewritten text into editable text. Workshare Compare supports the comparison of such PDF files.
- PDF files that have been created directly from the scanning: Where OCR has not been used and PDF files contain pure images of text. Workshare Compare applies OCR to the PDF files before performing comparisons.

**Notes:**

*If you compare scanned PDF files without applying OCR, it may result in a blank Redline document.*

*Workshare Compare can perform OCR on the following languages: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian, Polish, Portuguese, Spanish, Swedish and Russian.*

## Performing Comparisons

You can launch Workshare Compare both from within Microsoft Word and from your desktop.

You can compare your original document against a previous version of the document or against another document entirely. You can also compare any two versions of a document. For example, there may be ten versions of a document in your DMS. You can open version 3 and compare it against version 5. You can also compare a document against multiple versions. For example, you can open version 3 and compare it against version 5, version 7 and version 10.

**Note:** You cannot compare secure PDFs, meaning PDF files with security settings configured.

You can also use Workshare Compare to compare an email attachment with another document on your local file system, SharePoint or DMS. Refer to Comparing an Attachment.

## Launching Workshare Compare from Microsoft Word

In this scenario, you first open your original document in Microsoft Word.

**To compare documents:**

1. Click **Compare** in the *Workshare* tab, **Compare** group or click **Compare** in the Home page of the Workshare Panel. The Compare page is displayed as follows:

2. Select the document against which you want to compare the open original document in one of the following ways:
  - Select a version of the document from the dropdown list. When the document has previous versions, the dropdown list is a list of other versions of the document. When the document has no versions but has previously been sent for review, the list is a list of previously sent out versions of the document. These “versions” are actually revisions, which are created when the document is sent for review if the document has changed since the last time it was sent.
  - Click **Browse** and select a document from your DMS/CRM, SharePoint or locally.

**Note:** When Workshare is integrated with your DMS/CRM, for example NetDocuments, the Open from NetDocuments dialog is displayed. Clicking Cancel will enable you to select a comparison document locally.

The Compare page is displayed as follows:

The screenshot shows the 'Workshare Compare Documents' dialog box. It features a title bar with the Workshare logo and window controls. Below the title bar is a navigation bar with a home icon, a back arrow, and a question mark. The main area is titled 'Compare Documents' and contains three sections:

- 1. Information:** 'This document is:' followed by a text box containing 'Original Test UG'.
- 2. Select Document:** 'Selected Document:' followed by a text box containing 'Modified Test UG' and a blue 'Remove' link to its right.
- 3. Comparison Option:** 'Please select how you would like your comparison displayed:' followed by a dropdown menu showing 'Workshare Default' and a checked checkbox labeled 'Open in Compare'.

A blue 'Compare' button is located at the bottom right of the dialog.

**Tip!** If you want to change the selected document, click the **Remove** link and select a different document.

3. If required, select a rendering set from the dropdown list in the **Comparison Option** area to determine how the comparison document is displayed. For example, deleted text could be shown in ~~red with a strikethrough~~. For further information about rendering sets, refer to Introducing Rendering Sets.

4. Select the **Open in Compare** checkbox. Deselecting this checkbox will display the comparison within Microsoft Word. Refer to Overview – Comparing Documents from Within Microsoft Word for more information.
5. Click **Compare**. Workshare Compare performs the comparison. A progress bar indicates the progress of the compare process.

When the comparison is complete, the results of the comparison are displayed in the Workshare Compare window. For a full description of the Workshare Compare interface, refer to Workshare Compare Main Window.

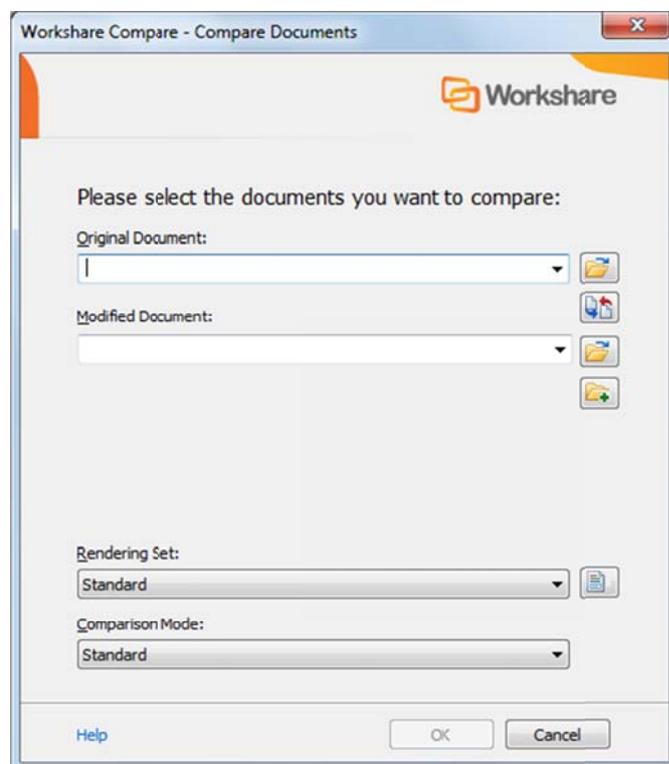
## Launching Workshare Compare from your Desktop

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. 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. Click the Workshare Compare shortcut on your desktop or from the Start menu, select **Programs > Workshare > Workshare Compare**. The *Compare Documents* dialog is displayed:

*Tip!* You can also right-click a document you want to compare in Windows Explorer or in your DMS (Autonomy iManage/Open Text/Worldox) and select **Compare with Workshare**. You cannot launch Workshare Compare from NetDocuments or SharePoint in this way.



2. Select the original document you want to compare by clicking the **Open**  button to the right of the **Original Document** field.
3. Navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**. The selected document is displayed in the **Original Document** field.

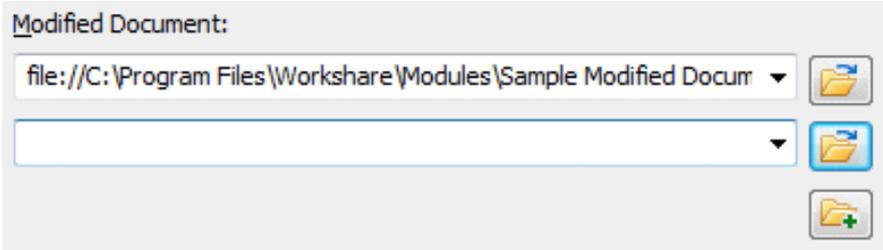
*Tip: You can also enter text directly into the text box. Workshare Compare will predict locations as you type. This is possible for locations accessible from the local machine but not for locations in a DMS.*

4. Select the document you want to compare with the original document (DOC/X or PDF file) by clicking the **Open**  button to the right of the **Modified Document** field.
5. Navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**. The selected document is displayed in the **Modified Document** field.

*Tip! If you want to compare a recently used file, click the dropdown ▼ in the **Original Document** and **Modified Document** fields and select the documents you want to compare. These lists contain the last 10 documents you have used.*

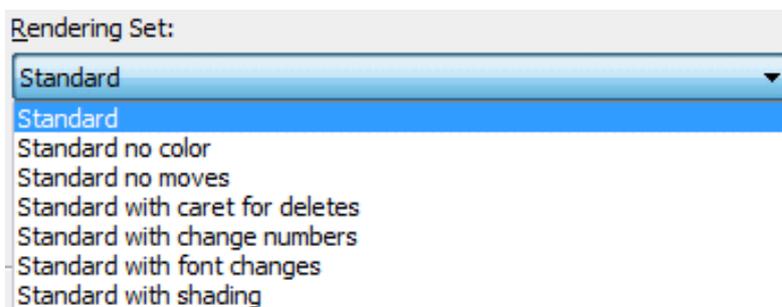
*Tip! To swap the original and modified documents, click . This button is only available if you are comparing two documents rather than comparing multiple documents against an original document.*

6. If you want to compare the original document against another document, click . An additional **Modified Document** field is added as follows:



7. Select the document you want to compare with the original document by clicking the **Open**  button to the right of the second **Modified Document** field.
8. Navigate to the document location in your local file system, SharePoint or DMS/CRM and click **Open**. The selected document is displayed in the second **Modified Document** field.
9. Repeat steps 6-8 to add further documents as required.

10. 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 (compared) document. You can select from the standard rendering sets provided with Workshare Compare or you can create and customize your own rendering sets (described in *Introducing Rendering Sets*).



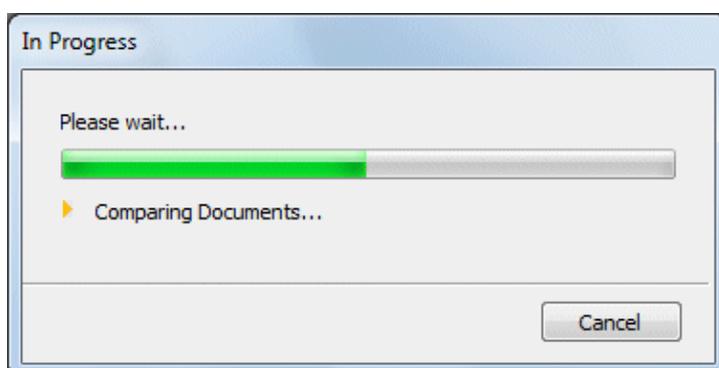
**Note:** Clicking  to the right of the **Rendering Set** field displays the *Rendering Sets Manager* where you can create, modify and delete rendering sets. For a full description refer to *Introducing Rendering Sets*.

11. From the **Comparison Option** 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 file against another .DOC file, Workshare Compare performs a binary comparison which is faster than a standard comparison because it is comparison at the binary level. When comparing a .DOCX file against another .DOCX file, Workshare Compare performs a faster comparison by converting the documents to RTF faster than MS Word.

**Notes:**  
*The **Fast** option is only available for DOC files if the **Enable fast comparison for DOC files** parameter (**Comparison > Administration** category) in the *Workshare Configuration Manager* is selected.*  
*The **Fast** option is only available for DOCX files if the **Enable fast comparison for DOCX files** 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 performs 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.

12. Click **OK**. The comparison process is launched and a Progress dialog is displayed.



The Progress dialog indicates the progress of the comparison.

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



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

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

If Workshare Compare cannot complete the comparison, it will do one of two things:

- If enabled, auto retry mode is invoked. See Auto Retry Mode.
- If auto retry mode is not enabled (or if Workshare Compare cannot complete the comparison in auto retry mode) failsafe mode is invoked. See Failsafe Mode.

## Auto Retry Mode

If Workshare Compare is unable to complete the comparison, and auto retry mode is enabled, then Workshare Compare attempts to perform the comparison using reduced settings. For example, Workshare Compare may attempt to compare the documents without comparing field codes or without comparing footnotes. Workshare Compare repeatedly attempts to perform the comparison disabling settings one at a time until the comparison is successful.

**Note:** Auto retry mode is enabled in the **Comparison Options** category of the **Rendering Sets Manager**. Refer to **Comparison Options**.

Once the comparison is successful, a message is displayed informing you that the comparison has been performed using reduced settings.

**Note:** The comparison may take longer than usual because Workshare Compare is attempting to compare using different settings.

Click **OK** and scroll to the Redline Options Summary, which is displayed at the beginning or end of the Redline document according to your settings in the **Redline Options** category of the Rendering Sets Manager.

The Redline Options Summary indicates which settings Workshare Compare disabled in order to perform the comparison.

<b>Redline Options Summary</b>	
<b>Option:</b>	<b>Status:</b>
Redline Statistics at End of Document	ON
Include Redline Comparison Summary	OFF
Show Line Numbering	OFF
Show Change Numbers	OFF
Show Change Bars on Left	ON
Show Hidden Text	OFF
Detect List Numbering Changes	ON
Compare Headers/Footers	ON
Compare Footnotes	SET OFF
Display Compare Footers	OFF
Ignore Embedded Objects/Images	OFF
Compare at Character Level	OFF
Compare Numbers at Character Level	OFF
Show Moved Deletions	OFF
Show Changes to Spaces	OFF
Show Paragraph Changes	OFF
Ignore Case Changes	OFF
Ignore Textboxes	SET ON
Ignore Field Codes	OFF
Ignore Tables	OFF

**Note:** Even if you have not selected the **Include Redline Options Summary** parameter in the **Redline Options** category of the Rendering Sets Manager, when Workshare Compare performs an auto retry, the Redline Options Summary is always displayed after the comparison.

The status indications are as follows:

<b>ON</b>	This setting is selected and was applied during the comparison.
<b>OFF</b>	This setting is not selected and was not applied during the comparison.
<b>SET ON</b>	This setting was not selected but was enabled by Workshare Compare and applied during the comparison.
<b>SET OFF</b>	This setting was selected but was disabled by Workshare Compare and not applied during the comparison.

If Workshare Compare cannot complete the comparison even using reduced settings, failsafe mode is invoked.

## Failsafe Mode

If Workshare Compare is unable to complete the comparison and auto retry mode is disabled, or if Workshare Compare cannot complete even a reduced comparison in auto retry mode, then failsafe mode is invoked. Failsafe mode means that Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

## Manually Invoke Failsafe Mode

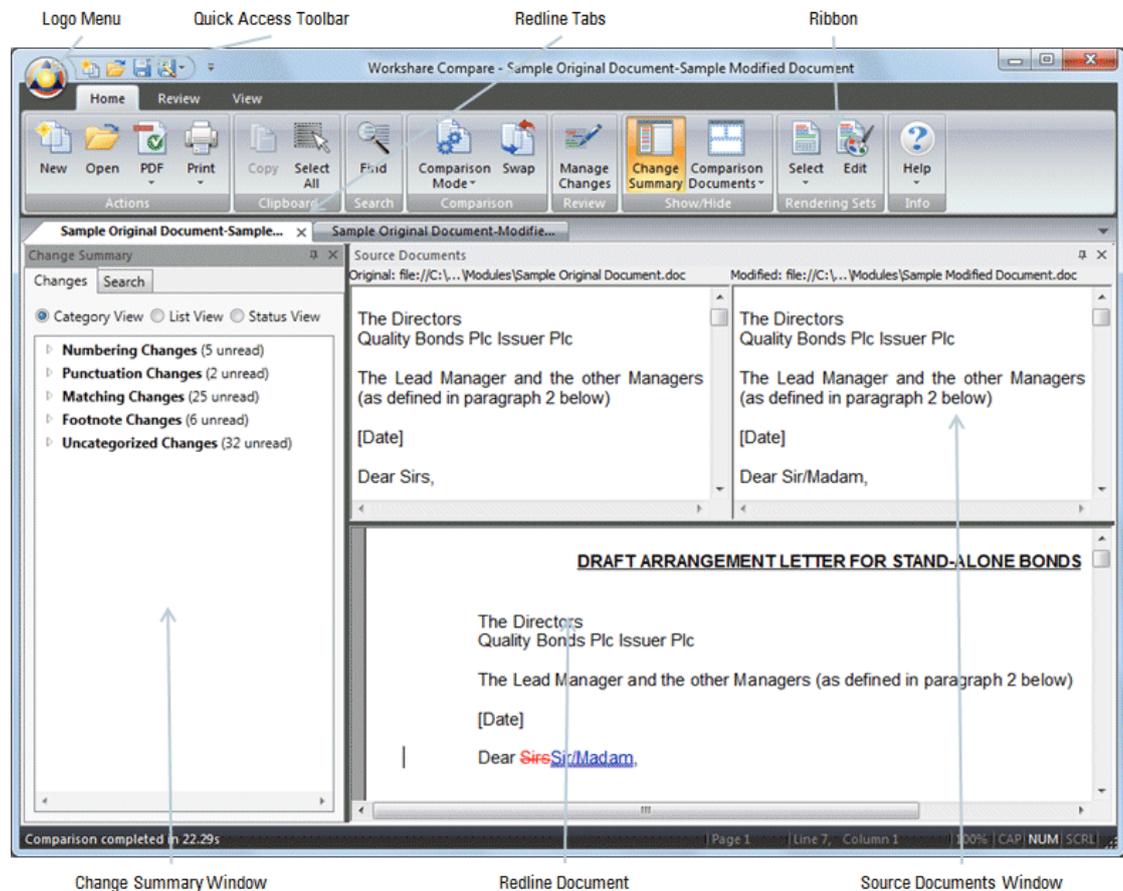
You can manually invoke failsafe mode so that a text only comparison is performed. You may want to do this if, after a full comparison, your Redline document was not fully shown in Workshare Compare for any reason. Additionally, you may want to do this if you are more interested to see text changes rather than formatting and style changes.

Before running the comparison, select **Text Only** from the **Comparison Option** dropdown list in the *Compare Documents* dialog and then click **OK** to run the compare.

## Workshare Compare Main Window

The Workshare Compare main window enables you to view Redline documents - the results of a comparison between an original document and a modified document. You can view (in one work area) both source documents, the Redline document and a summary of the changes between the two source documents.

***Note:** This section describes the Ribbon interface of Workshare Compare. If you are more comfortable with the Classic interface, click **Classic View** in the View Ribbon. Switching between views requires a restart of Workshare Compare.*



The Ribbon changes according to the selected tab. In the above example, the Home tab is selected. When you select to run multiple comparisons, each resulting Redline document is displayed in an individual tab.

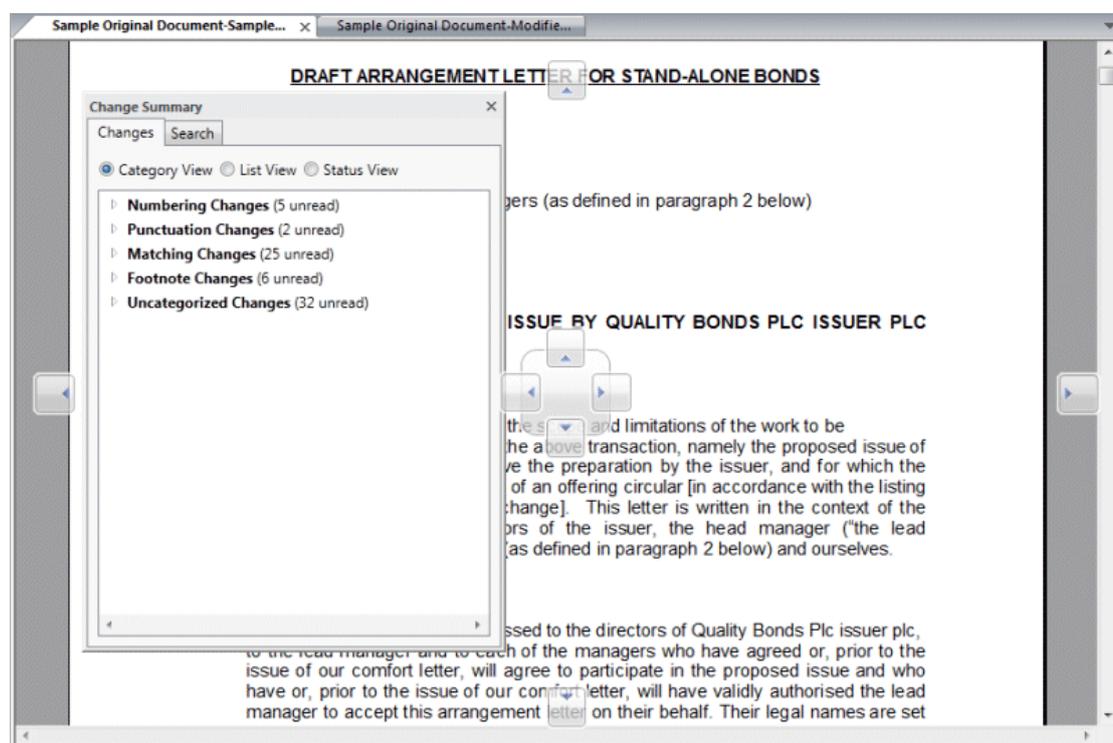
## Moving and Placing Windows

The Source Documents window and the Change Summary window can easily be moved to different positions in the Workshare Compare main window according to individual preference.

Left click the title bar of the Source Documents window or Change Summary window and drag the window to your preferred position. The selected window will float over the workspace.

### To dock a window:

Left-click the title bar of a floating window and keep the mouse button pressed. Positioning arrows appear at the top, bottom, left and right of the Workshare Compare main window, as well as in the center.



Move the mouse pointer over the required positioning arrow and release the mouse button. The window is docked in the selected location. For example, dragging the Change Summary window over the left positioning arrow will dock the Change Summary window down the left side of the Workshare Compare main window.

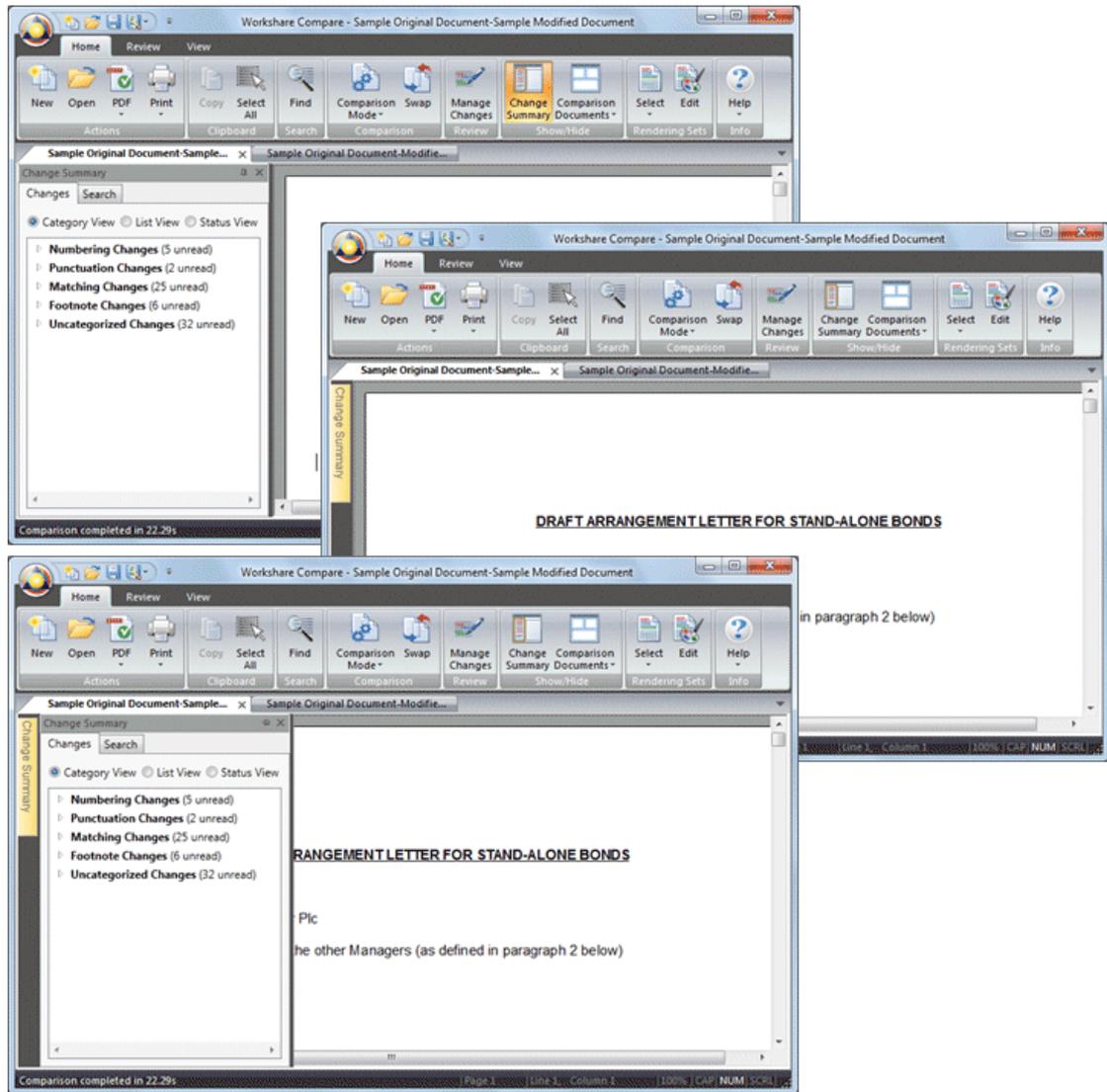
### To hide a window:

Click  in the top right corner of the Source Documents window or the Change Summary window.

Use the options in the **Show/Hide** group on the Home or View tab.

**To auto-hide a window:**

Click  in the top right corner of the Source Documents window or the Change Summary window. The selected window is hidden with just a tab remaining. For example, if the Change Summary window was displayed on the left side of the Workshare Compare main window and you click , the Change Summary window is hidden with just a tab displayed on the left side. By hovering over this tab, the Change Summary window is displayed again and you can work in it as required. Once you click elsewhere, for example in the Redline document, then the Change Summary window is automatically hidden again.

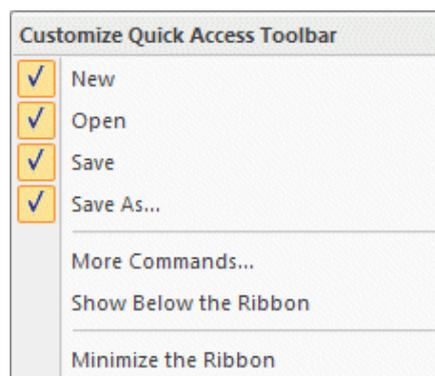


To turn off auto-hide, click .

## Quick Access Toolbar



The Quick Access Toolbar provides one-click access to functionality available in the Home, Review and View Ribbons. By default, the **New**, **Open**, **Save** and **Save As** buttons are included in the Quick Access Toolbar. By clicking the arrow to the right of the Quick Access Toolbar, you can customize the Quick Access Toolbar as follows:



Select/deselect the **New**, **Open**, **Save** or **Save As** options to display/hide these options in the Quick Access Toolbar.

Select **More Commands** to add additional options to the Quick Access Toolbar.

Select **Show Below the Ribbon** to display the Quick Access Toolbar below the main toolbar.

Select **Minimize the Ribbon** to hide the details of the Ribbon until you click the Home, Review or View tabs.

## Logo Menu



Clicking the Workshare Compare logo displays a menu with the following options:

Option	Description
<b>New</b>	Opens the <i>Document Selection</i> dialog enabling you to perform a new document comparison. Refer to <i>Performing Comparisons</i> .
<b>Open</b>	Enables you to open a saved document comparison. Comparisons are saved as Workshare DeltaFiles (.WDF).
<b>Save</b>	Enables you to save the current document comparison. Refer to <i>Saving Redline Documents</i> .
<b>Save As</b>	Includes the following sub-options:
<b>Save As Comparison document</b>	Enables you to save a Redline document as a WDF, DOC, DOCX, TXT, RTF, HTM or PDF file. Refer to <i>Saving Redline Documents</i> .
<b>Save As Track Change document</b>	Enables you to save a Redline document as a DOCX document with the changes shown as track changes. Refer to <i>Saving Redline as Track Change Document</i> .

Option	Description
<b>Manage Changes</b>	Enables you to import the modified document into the original document and then accept or reject the changes proposed by the modified document as required. Refer to <b>Error! Reference source not found.</b> for further information.
<b>Print</b>	Enables you to print the Redline document and includes the following sub-options:
<b>Print Original</b>	Enables you to print the original source document. Refer to Printing Redline Documents.
<b>Print Modified</b>	Enables you to print the modified source document. Refer to Printing Redline Documents.
<b>Print Comparison</b>	Enables you to print the Redline document. Refer to Printing Redline Documents.
<b>Print Preview</b>	Enables you to preview the print output and includes the following sub-options:
<b>Preview Original</b>	Enables you to preview the original source document.
<b>Preview Modified</b>	Enables you to preview the modified source document.
<b>Preview Comparison</b>	Enables you to preview the Redline document.
<b>Email</b>	Includes the following sub-options:
<b>Send as Comparison document</b>	Enables you to send the current documents (the original, the modified and the Redline) as email attachments. Refer to Sending Compared Documents by Email.
<b>Send as Track Change document</b>	Enables you to send the Redline document as an RTF document with the changes shown as track changes. Refer to Sending Compared Documents by Email.
<b>Configuration Manager</b>	Opens the Workshare Configuration Manager where, if you have permission, you can configure system parameters. Refer to Introducing the Workshare Configuration Manager for further information.
<b>Properties</b>	Enables you to specify general information about the document comparison, such as title and author. The <i>Document Properties</i> dialog includes no properties information from the original or modified documents.
<b>About Workshare Compare</b>	Displays version information about Workshare Compare.
<b>Close</b>	Closes the currently displayed Redline document.

Clicking the **Exit** button on the bottom right of the Logo menu closes the Workshare Compare application. You are prompted to save any open Redline documents.

## Redline Tabs



When the original document has been compared against multiple modified documents, each resulting Redline document is displayed in a different tab. Select the tab header to display the comparison in the Workshare Compare window. You can also display the tabs side by side by clicking and dragging the tab header across the Workshare Compare window.

## Redline Document

The Redline document shows the results of the comparison between the original document and the modified document. Changes are marked according to the rendering set applied to the comparison. For example, deleted text could be ~~red and struck through~~ and added text could be blue and underlined.

You can navigate between the changes in the Redline document and edit the Redline document to take account of changes, if required. You can also save and print the Redline document as well as send it by email. All of these options are described in Working with Redline Documents.

## Redline Document Right-Click Menu

Right-clicking text or changes in the Redline document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
<b>Copy</b>	Copies selected text to the clipboard.
<b>Select All</b>	Selects all the content of the Redline document.
<b>Find</b>	Opens the <i>Find</i> dialog enabling you to search for specified text or keywords in the Redline document.
<b>Find Next</b>	When you have specified text or a keyword in the <i>Find</i> dialog, navigates to the next occurrence of the specified search text or keyword in the Redline document.
<b>Edit Redline</b>	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to Editing Redline Documents.
<b>Convert to Track Changes</b>	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to Converting to Track Changes.
<b>Zoom</b>	Enables you to change the display of the Redline document from 20% to 200% of its original size.
<b>Link to Move</b>	When text has been moved to another position, navigates and highlights the text in its new or previous position in the Redline document. When right-clicking text in its new position, clicking <b>Link to Move</b> highlights the text in its previous position. When right-clicking text in its original position, clicking <b>Link to Move</b> highlights the text in its new position. You must right-click a move-type change for this option to be available.

Option	Description
<b>Link to Change</b>	<p>Jumps to the Redline Summary (at the end of the Redline document) highlighting the selected change.</p> <p>The <b>Include Redline Summary</b> option must be selected in the applied rendering set. Refer to Redline Options.</p> <p>You must right-click a change for this option to be available.</p>

## Redline Comparison Summary

At the beginning or end of the Redline document, you can see a summary of the comparison and a list of the changes found.

Document comparison by Workshare Compare on 19 March 2012 13:55:16

Input:	
Document 1 ID	file://C:\Program Files\Workshare\Modules\Sample Original Document.doc
Description	Sample Original Document
Document 2 ID	file://C:\Program Files\Workshare\Modules\Sample Modified Document.doc
Description	Sample Modified Document
Rendering set	Standard

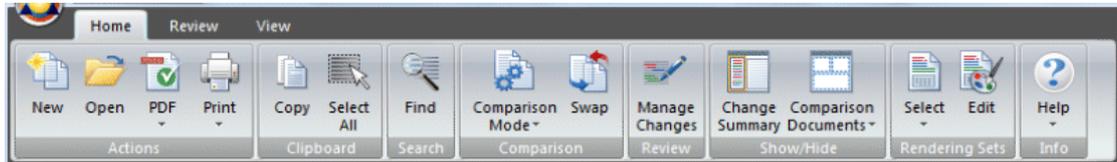
Legend:	
Insertion	<span style="color: blue; text-decoration: underline;"> </span>
Deletion	<span style="color: red; text-decoration: underline;"> </span>
Moved from	<span style="color: green; text-decoration: underline;"> </span>
Moved to	<span style="color: green; text-decoration: underline;"> </span>
Style change	<span style="color: gray;"> </span>
Format change	<span style="color: gray;"> </span>
Moved deletion	<span style="color: red; text-decoration: underline;"> </span>
Inserted cell	<span style="background-color: #ccccff;"> </span>
Deleted cell	<span style="background-color: #ffcccc;"> </span>
Moved cell	<span style="background-color: #ccffcc;"> </span>
Split/Merged cell	<span style="background-color: #ffffcc;"> </span>
Padding cell	<span style="background-color: #cccccc;"> </span>

Statistics:		
	Count	
Insertions	48	
Deletions	47	
Moved from	10	
Moved to	10	
Style change	0	
Format changed	0	
Total changes	115	

In order for the Redline document to include this summary, ensure that **Include Redline Comparison Summary** is selected in the **Redline Options** category of the Rendering Sets Manager. Refer to Redline Options.

## Home Tab

The Home Ribbon enables you to print Redline documents, open saved Redline documents, as well as initiate new comparisons.



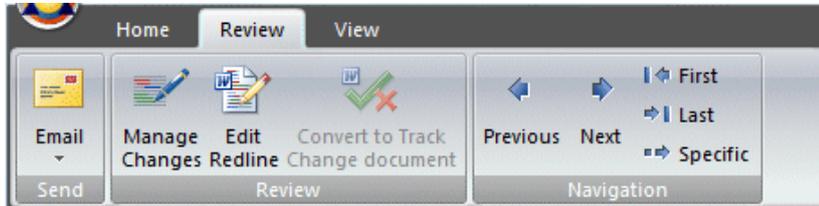
The options are described in the following table.

Group	Option	Description
Actions	New	Opens the <i>Document Selection</i> dialog enabling you to perform a new document comparison. Refer to Performing Comparisons.
	Open	Enables you to open a saved document comparison. Comparisons are saved as Workshare DeltaFiles (.WDF).
	PDF	<b>Convert to PDF:</b> Enables you to convert the Redline document to PDF or PDF/A. <b>Convert to PDF and Email:</b> Enables you to convert the Redline document to PDF or PDF/A and send as an email attachment. Refer to Converting Redline to PDF.
	Print	Enables you to print the Redline document. <b>Print Original:</b> Enables you to print the original document. <b>Print Modified:</b> Enables you to print the modified document. <b>Print Comparison:</b> Enables you to print the Redline document. Refer to Printing Redline Documents.
Clipboard	Copy	Copies selected text to the clipboard.
	Select All	Selects all the content of the original or modified document.
Search	Find	Opens the <i>Find</i> dialog enabling you to search for specified text or keywords in the original or modified document.
Comparison	Comparison Mode	Enables you to select a comparison mode from the dropdown list and Workshare Compare automatically re-runs the comparison in the selected mode – <b>Standard, Text Only, Fast</b> or <b>Compare without OCR</b> . For more information about the types of comparison, refer to Overview - Comparing Documents Using Workshare Compare.
	Swap	Swaps the original and modified documents. Refer to Swapping the Source Documents.
Review	Manage Changes	Enables you to import the modified document into the original document and then accept or reject the changes proposed by the modified document as required. Refer to <b>Error! Reference source not found.</b> for further information.

Group	Option	Description
Show/Hide	Change Summary	Displays/hides the Change Summary window. Refer to Change Summary Window.
	Comparison Documents	<p>Enables you to select what to display in the Workshare Compare main window.</p> <p><b>All Documents:</b> Displays the source documents and the Redline document.</p> <p><b>Original:</b> Displays the original document in the Source Documents window.</p> <p><b>Modified:</b> Displays the modified document in the Source Documents window.</p> <p><b>Redline Only:</b> Hides the Source Documents window and displays the Redline document only.</p> <p>Refer to Source Documents Window.</p>
Rendering Sets	Select	Enables you to select a different rendering set from the dropdown list and Workshare Compare automatically re-runs the comparison applying the selected rendering set. Refer to Introducing Rendering Sets.
	Edit	Opens the Rendering Sets Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to Introducing Rendering Sets.
Info	Help	<p>Provides access to online help.</p> <p><b>About:</b> Displays version and copyright information about Workshare Compare.</p> <p><b>Keyboard Shortcuts:</b> Displays a list of keyboard shortcuts available in Workshare Compare.</p> <p><b>License:</b> Displays information about your Workshare Compare license.</p> <p><b>Help:</b> Provides access to online help.</p>

## Review Tab

The Review Ribbon enables you to review and manage the changes as well as email a Redline document.

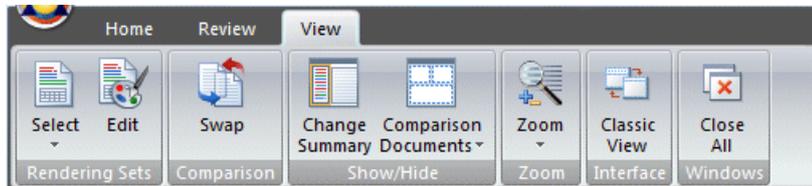


The options are described in the following table.

Group	Option	Description
Send	Email	<b>Send as Comparison document:</b> Enables you to send the current documents (the original, the modified and the Redline) as email attachments.
		<b>Send as Track Changes document:</b> Enables you to send the Redline document as an RTF document with the changes shown as track changes. Refer to Sending Compared Documents by Email.
Review	Manage Changes	Enables you to import the modified document into the original document and then accept or reject the changes proposed by the modified document as required. Refer to <b>Error! Reference source not found.</b> for further information.
	Edit Redline	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to Editing Redline Documents.
	Convert to Track Change document	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to Converting to Track Changes.
Navigation	Previous	Navigates to the previous change and highlights the entire change in the Redline document. Refer to Navigating Between Changes.
	Next	Navigates to the next change and highlights the entire change in the Redline document. Refer to Navigating Between Changes.
	First	Navigates to the first change and highlights the entire change in the Redline document. Refer to Navigating Between Changes.
	Last	Navigates to the last change and highlights the entire change in the Redline document. Refer to Navigating Between Changes.
	Specific	Enables you to navigate to a specific change number. The entire change is highlighted in the Redline document. Refer to Navigating to a Specific Change Number.

## View Tab

The View Ribbon enables you to display the source documents and a summary of the changes as well as edit rendering sets.

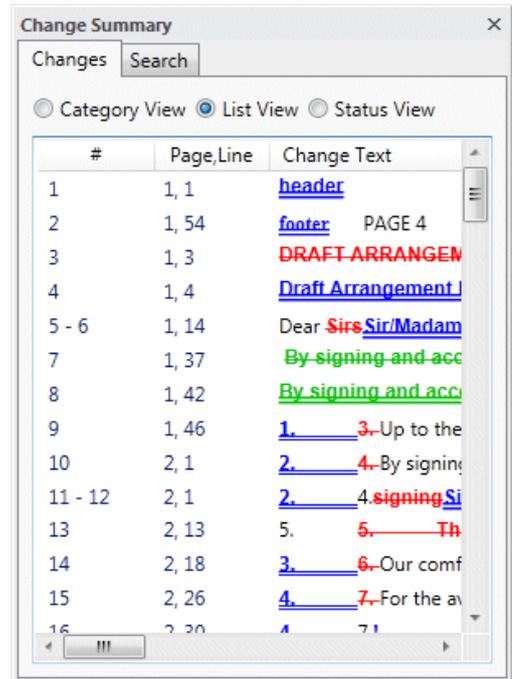
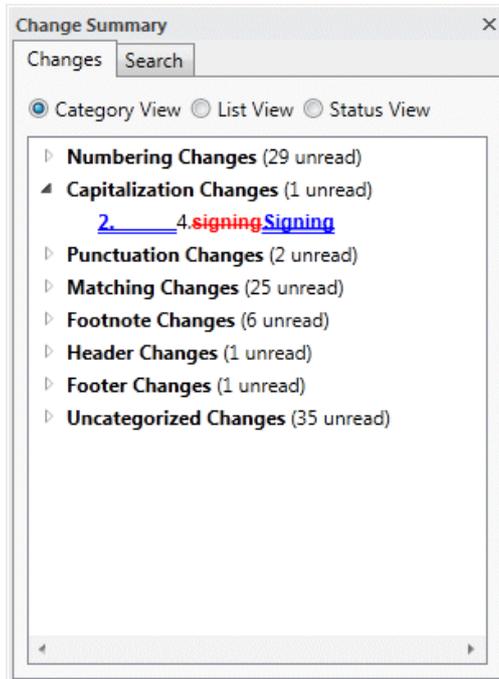


The options are described in the following table.

Group	Option	Description
<b>Rendering Sets</b>	<b>Select</b>	Enables you to select a different rendering set from the dropdown list and Workshare Compare automatically re-runs the comparison applying the selected rendering set. Refer to <a href="#">Introducing Rendering Sets</a> .
	<b>Edit</b>	Opens the Rendering Sets Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to <a href="#">Introducing Rendering Sets</a> .
<b>Comparison</b>	<b>Swap</b>	Swaps the original and modified documents. Refer to <a href="#">Swapping the Source Documents</a> .
<b>Show/Hide</b>	<b>Change Summary</b>	Displays/hides the Change Summary window. Refer to <a href="#">Change Summary Window</a> .
	<b>Comparison Documents</b>	Enables you to select what to display in the Workshare Compare main window. <b>All Documents:</b> Displays the source documents and the Redline document. <b>Original:</b> Displays the original document in the Source Documents window. <b>Modified:</b> Displays the modified document in the Source Documents window. <b>Redline Only:</b> Hides the Source Documents window and displays the Redline document only. Refer to <a href="#">Source Documents Window</a> .
<b>Zoom</b>	<b>Zoom</b>	Enables you to change the display of the Redline, original or modified document from 20% to 200% of its original size.
<b>Interface</b>	<b>Classic View</b>	Switches to the Classic interface of Workshare Compare where options are displayed either within menus or on a toolbar.
<b>Windows</b>	<b>Close All</b>	Closes all open Redline documents.

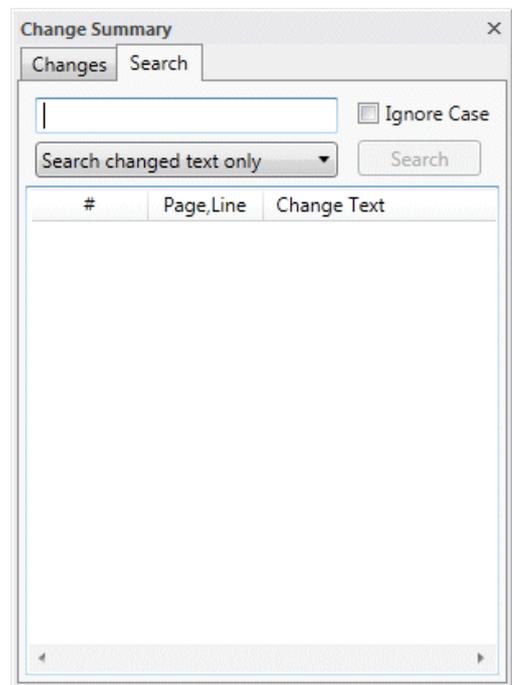
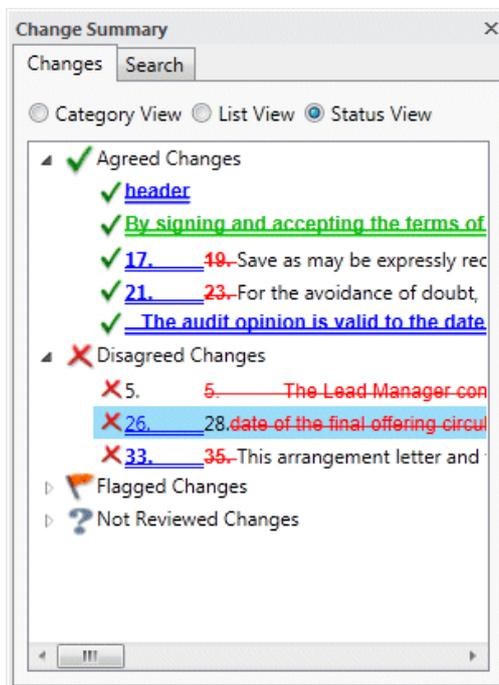
## Change Summary Window

From the Home Ribbon or View Ribbon, you can select to display the Change Summary window.



Changes tab, Category View

Changes tab, List View



Changes tab, Status View

Search tab

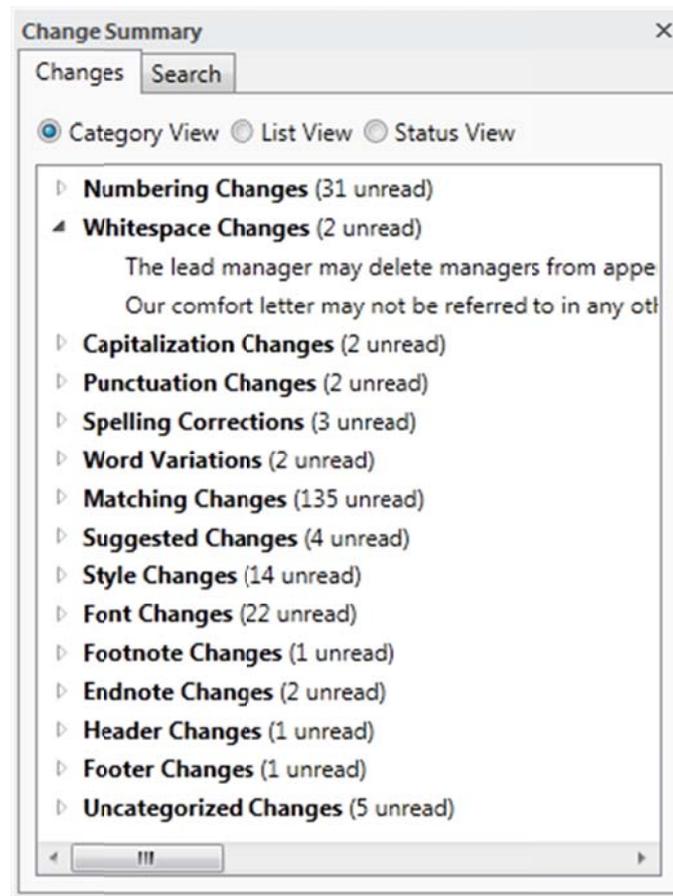
Selecting a change in the Change Summary window highlights the change in the Redline document and displays the position of the change in both the source documents.

You can hide/display the Change Summary window by clicking **Change Summary** in the View Ribbon.

***Tip!** The Change Summary window is by default positioned down the left side of the Workshare Compare environment. It can be moved as required. Refer to Moving and Placing Windows.*

You can right-click a change and select a status for that change. Refer to Reviewing Changes.

### Changes Tab Category View



The Changes tab, Category View of the Change Summary window displays all the changes between the original document and the modified document according to the type of change. The changes can be grouped into any of the following categories:

- **Numbering Changes:** Any changes to numbering lists identified in a document.
- **Whitespace Changes:** Changes that only involve whitespace – ie deletion/insertion of spaces or tabs, or a space changing to a tab or 3 spaces changing to tabs.
- **Capitalization Changes:** Any changes to the capitalization of a word.
- **Punctuation Changes:** Any changes to a punctuation mark.

- **Spelling Corrections:** Changes where a single word replacement includes the deletion of a word that is not a dictionary word and the insertion of a dictionary word in its place. The replacement word must also be a spell check suggestion for the replaced word – for instance replacing 'recieve' with 'receive'.
- **Word Variations:** Changes which involve changing the form a word ie replacing 'confirms' with 'confirmed' – the two words (original and replacement) must come from the same stem word and just have different endings. This relies on a dictionary as well – refer to document above on instructions on how this can be customized.
- **Matching Changes:** Changes that are repeated and identical.
- **Suggested Changes:** Changes that a reviewer could have neglected to make. For example, there are 400 instances of "ACME INC" in the original document but the reviewer has only changed 399 of these to "Workshare Inc". The **Missed Changes** category will indicate that there is 1 change that might have been missed.
- **Style Changes:** Style changes in a document.
- **Font Changes:** Changes made to font type, font style, font colour, underline style, underline color and font effects.
- **Footnote Changes:** Any changes in the footnote of a document.
- **Endnote Changes:** Any changes in the endnote of a document.
- **Header Changes:** Any changes in the header of a document.
- **Footer Changes:** Any changes in the footer of a document.
- **Placeholder Changes:** The change summary shows items for blocks of placeholder text that are found to be matching between the original and modified documents. While these are not changes between the two documents as such, they highlight areas where the editing of the document may be incomplete. Typical blocks of placeholder text might be '[Client Name]', '[Company Address]' etc.
- **Boilerplate Changes:** Changes that occur inside blocks of boilerplate text in a special 'Boilerplate Changes' section. These changes merit special attention as in general boilerplate text should not be modified. Note that the change is only marked as a boilerplate change if it is found inside an occurrence of one of the boilerplate text items in the original document.
- **Uncategorized Changes:** Changes that do not fall into any of the above groups.

## Changes Tab List View

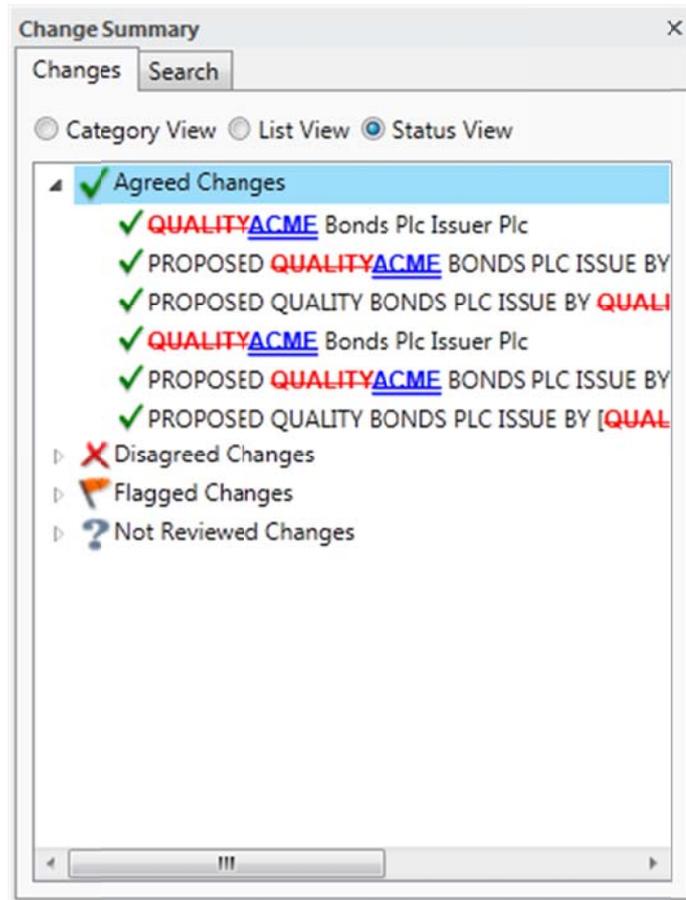
#	Page,Line	Change Text
1	1, 1	<u>DRAFT ARRANGEMENT LE</u>
2 - 3	1, 56	C:\Extended_API_TestFiles\Ori
4	1, 3	<del>DRAFT ARRANGEMENT LE</del>
5 - 6	1, 6	The <del>Directrs</del> <u>Directors</u>
7 - 8	1, 7	✓ <u>QUALITYACME</u> Bonds Plc
9 - 10	1, 15	✓ PROPOSED <u>QUALITYACM</u>
11 - 12	1, 15	✓ PROPOSED QUALITY BOND
13 - 14	1, 20	✗ 1. This arrangement
15 - 16	1, 24	✗ This <del>letter</del> <u>notice</u> is writter
17 - 18	1, 31	✗ 2. This arrangement
19	1, 32	2. This arrangement let
20 - 21	1, 33	✗ prior to the issue of our co
22 - 23	1, 34	✗ prior to the issue of our co
24 - 25	1, 35	✗ will have validly authorised
26 - 27	1, 37	✗ Their legal names are set o
28 - 29	1, 37	are referred to in this <del>affar</del>

The Changes tab, List View of the Change Summary window displays all the changes between the original document and the modified document in the order that they occur.

The following information is shown for each change in List View of the Change Summary window:

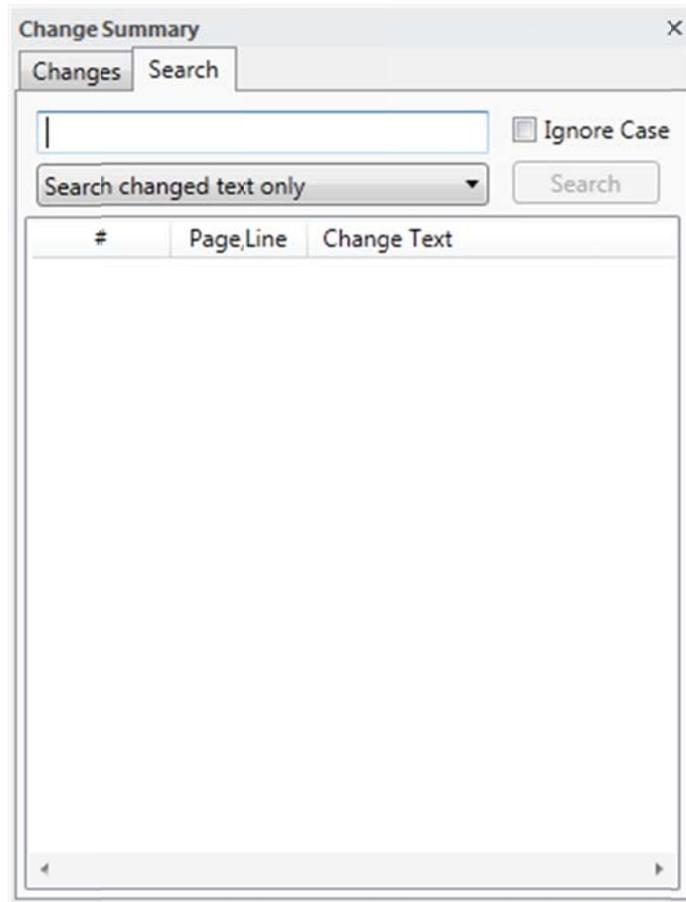
- #** The number of the change in the document. A change may have two numbers when it includes two actions. For example, a deletion and an addition.
- Page, Line** The page number and the line number in the original document where the change occurs.
- Change Text** Details of the change.

### Changes Tab Status View



The Changes tab, Status View of the Change Summary window displays all the changes between the original document and the modified document according to their status – Agreed, Disagreed, Flagged and Not Reviewed.

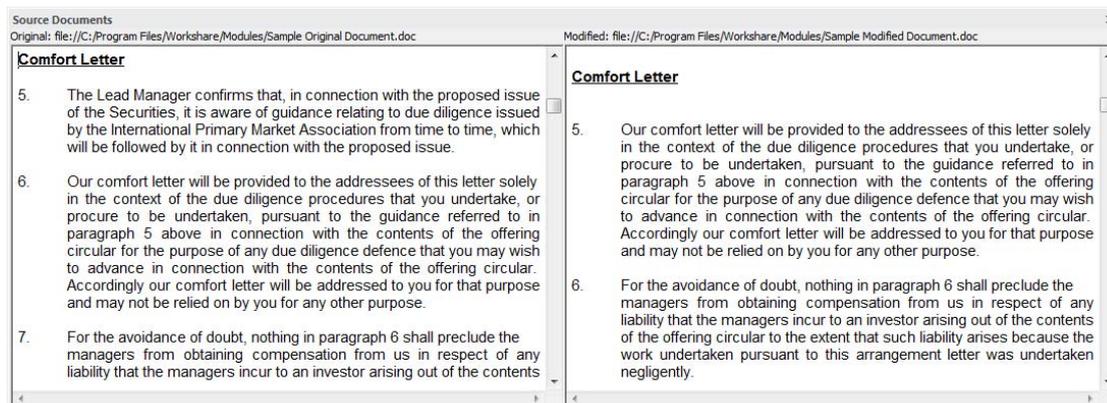
## Search Tab



The Search tab enables you to search for changes in the Redline document that include a specific keyword or text. Refer to Searching for Changes.

## Source Documents Window

From the Home Ribbon or View Ribbon, you can select to display the Source Documents window. You can select (from the **Comparison Documents** option) to display the original document, the modified document or both documents in the Source Documents window..



The Source Documents window can display the original document and the modified document. You can scroll through both documents as required. Selecting a point in one source document automatically scrolls the other source document as well as the Redline document to the same point. The source documents are read-only and cannot be modified in any way. The name of the source document is shown above the document.

**Tip!** The Source Documents window is by default positioned across the top of the Workshare Compare environment. It can be moved as required. Refer to [Moving and Placing Windows](#).

Right-clicking text in the original document or the modified document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
<b>Copy</b>	Copies selected text to the clipboard.
<b>Select All</b>	Selects all the content of the original or modified document.
<b>Find</b>	Opens the <i>Find</i> dialog enabling you to search for specified text or keywords in the original or modified document.
<b>Find Next</b>	When you have specified text or a keyword in the <i>Find</i> dialog, navigates to the next occurrence of the specified search text or keyword in the original or modified document.
<b>Convert to Track Changes</b>	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to <a href="#">Converting to Track Changes</a> .
<b>Zoom</b>	Enables you to change the display of the original or modified document from 20% to 200% of its original size.

## Working with Redline Documents

This section describes the tools available to you when working with the compared (Redline) document after a comparison.

### Navigating Changes

After performing a comparison, you can review the Redline document (the result of the comparison) and consider the changes between the original and modified documents. You can move between changes in the Redline document by jumping from change to change or searching for a specific change using change numbers or keywords.

### Navigating Between Changes

Selecting a change in the Change Summary window highlights the change in the Redline document and displays the position of the change in both of the source documents.

<b><u>Work and Procedures</u></b>	
14.	<p><del>Our work will, where appropriate, be conducted in accordance with [the investment circular reporting standards issued by the auditing practices board of the united kingdom/any other applicable professional guidance].</del> In other jurisdictions, standards and practice relevant to reporting accountants may be different and may not provide for reporting in the manner contemplated herein. Accordingly our report should not be relied on as if it had been provided in accordance with the standards and practice of any professional body in any other jurisdiction. <u>Our work will, where appropriate, be conducted in accordance with [the investment circular reporting standards issued by the auditing practices board of the united kingdom/any other applicable professional guidance].</u></p>

Click **Previous** in the Review Ribbon to move to the previous change and highlight the entire change in the Redline document. Click **First** to move to the first change in the Redline document.

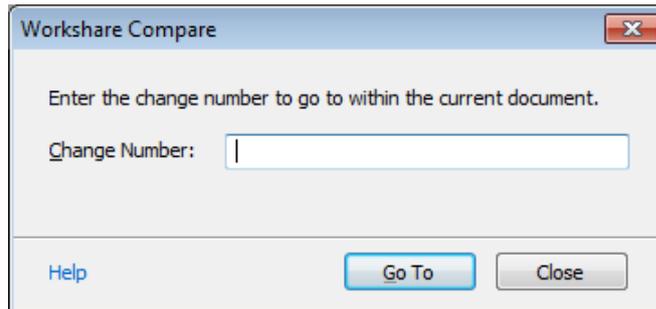
Click **Next** in the Review Ribbon to move to the next change and highlight the entire change in the Redline document. Click **Last** to move to the last change in the Redline document.

## Navigating to a Specific Change Number

Changes are allocated numbers, which are displayed next to the change in the Change Summary window. A change may have two numbers when it includes two actions, for example, a deletion and an addition. You can move to a specific change number in the Redline document.

### To navigate to a specific change number:

1. Click **Specific** in the Review Ribbon. The following dialog is displayed:



2. In the **Change Number** field, enter the number of the change you want to display in the Redline document.
3. Click **Go To**. The entire change is highlighted in the Redline document.
4. Repeat steps 2 and 3 to navigate to further changes as required.
5. Click **Close** to close the dialog.

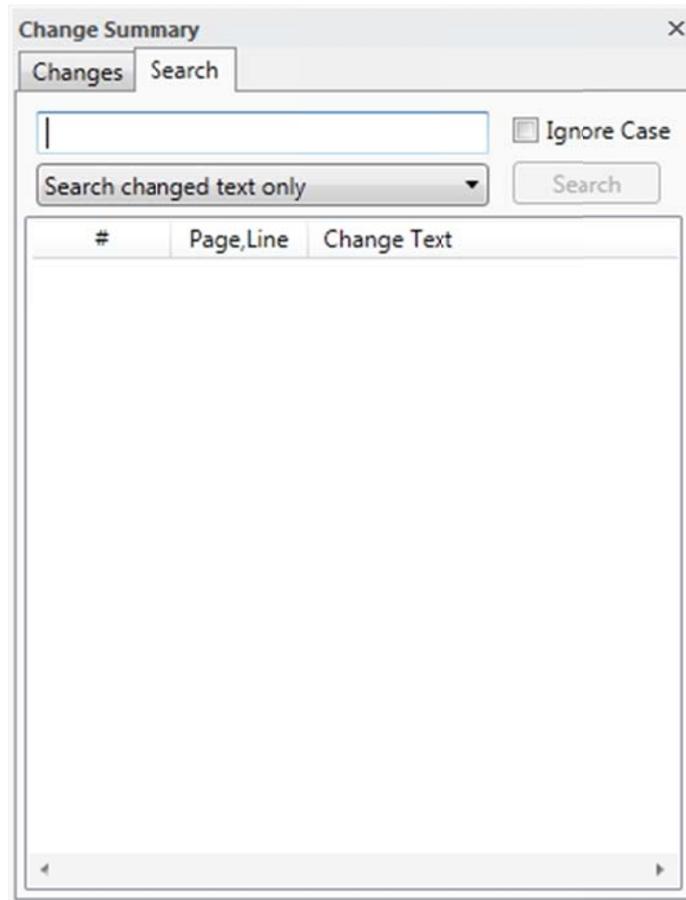
**Tip!** To maximize this feature, apply a rendering set with the **Show Change Numbering** parameter selected in the **Redline Rendering** category, **Change Numbering** section. Refer to **Change Numbering**. This shows all the change numbers against each change in the Redline document, for example, Dear ~~Sirs~~<sup>1</sup>; Sir/Madam<sup>2</sup>.

## Searching for Changes

You can search for changes in the Redline document that include a specified keyword or text. Workshare Compare can search only the changes for the specified text or it can search the text of the original or modified documents.

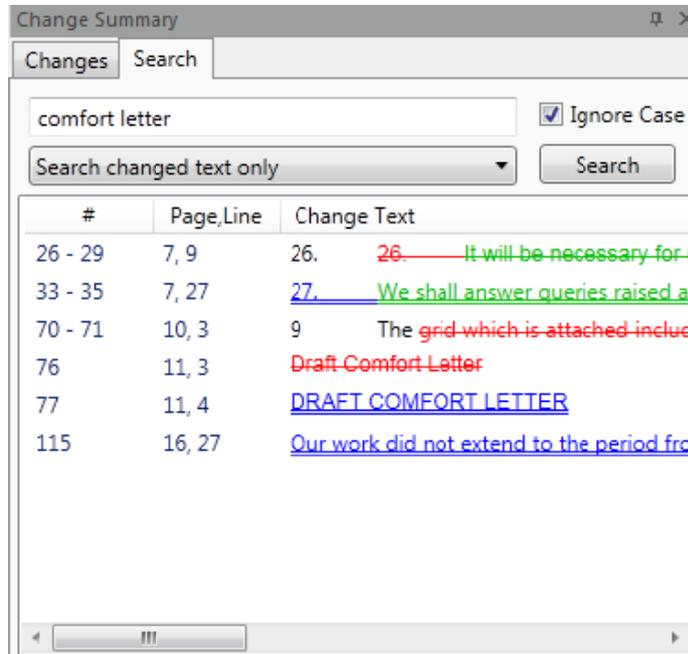
### To search for a change:

1. In the Change Summary window, select the **Search** tab or click **Find** in the Home Ribbon.



2. In the text box, enter the search criteria – the word or words for which you want to search.
3. If the case is not important, select the **Ignore Case** checkbox.
4. Select where you want to search from the dropdown list. The options are as follows:
  - **Search changed text only:** Searches through all text in the Redline document that has been changed.
  - **Search text near a change:** Searches through all text in the Redline document within a close proximity to a change.
  - **Search Original Document text:** Searches through all text in the Original Document.
  - **Search Modified Document text:** Searches through all text in the Modified Document.
  - **Search all Redline text:** Searches through all text in the Redline document.

- Click **Search**. A list of changes that include the specified word or words is displayed in the lower text area.



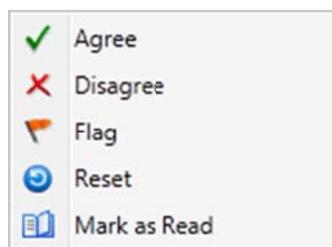
Selecting a change in the search results highlights the change in the Redline document and displays the position of the change in both the source documents.

## Reviewing Changes

You can go through the changes in the Redline document and mark them to indicate whether you agree with the change. This is useful if someone else will implement the changes to your document and you want to indicate which ones you agree with and which ones you want to ignore. Once you have reviewed the changes, you can save the Redline as a WDF file and send it to the person who will implement the changes.

### To review changes:

- In the Change Summary window, right-click a change. The following menu is displayed:



2. Select the required status for the change.
  - **Agree:** You agree with the proposed change. A green tick is displayed next to the change in the Change Summary window.
  - **Disagree:** You do not agree with the proposed change. A red cross is displayed next to the change in the Change Summary window.
  - **Flag:** You want to highlight the change – perhaps for future consideration or to check sources. A flag is displayed next to the change in the Change Summary window.
  - **Mark as Read:** You want to indicate that you have reviewed the change but do not want to give it a status.
3. If you want to change a status, select **Reset** from the right-click menu and the status is removed from the change.

**Note:** To reset a changed marked as read, select **Mark as Unread** from the right-click menu.

When you have completed your review, save the Redline document as a WDF file.

**Note:** If you review the changes and modify the status of a change, for example, to “Flag” or “Agree”, these status changes are only saved when you save the Redline as a WDF file. If you save the Redline in another format, the status changes will be lost.

## Swapping the Source Documents

You can re-run a comparison exchanging the original document for the modified document and the modified document for the original document. For example, if you selected Document A as the original document and Document B as the modified document, Workshare Compare compares Document A to Document B and presents the changes made to Document A. You can then swap the original and modified documents so that Document B is now the original document and Document A is the modified document. Workshare Compare automatically re-runs the comparison, comparing Document B to Document A, and presents the changes made to Document B.

### To swap the source documents:

Click **Swap** in the Home Ribbon or View Ribbon to swap the source documents. Workshare Compare automatically runs a new comparison, using the modified document as the original document and the original document as the modified document. The new Redline document is displayed in the same tab replacing the first comparison.

## Editing Redline Documents

In order to edit the Redline document, you can open it in Microsoft Word and use all standard Microsoft Word functionality to edit the document as required.

### To edit the Redline document:

1. Click **Edit Redline** in the Review Ribbon or right-click in the Redline document and select **Edit Redline**. The Redline document is opened in Microsoft Word as a DOC/DOCX file with the default name Redline.doc/docx. All the changes are displayed.

2. Edit the Redline document as required.
3. Click **Save**  to save the document. By default, Redline.doc/docx is saved in a temporary folder.

If you re-compare the original and modified documents, any changes made to the Redline document are lost. In order to save any changes made to the Redline document, you must save it.

## Changing the Comparison

You can re-run a comparison using a different comparison mode or applying a different rendering set or changing specific comparison options.

### Changing the Comparison Mode

You can re-run a comparison using a different comparison mode (or type) if required.

#### To re-run a comparison using a different mode:

From the **Comparison Mode** dropdown list in the Home Ribbon, select the required mode from the following:

- **Standard:** Workshare Compare performs a regular comparison.
- **Fast:** When comparing a .DOC file against another .DOC file, Workshare Compare performs a binary comparison which is faster than a standard comparison because it is comparison at the binary level.

When comparing a .DOCX file against another .DOCX file, Workshare Compare performs a faster comparison by converting the documents to RTF faster than MS Word.

#### **Notes:**

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

*The **Fast** option is only available for DOCX files if the **Enable fast comparison for DOCX files** 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 performs 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.

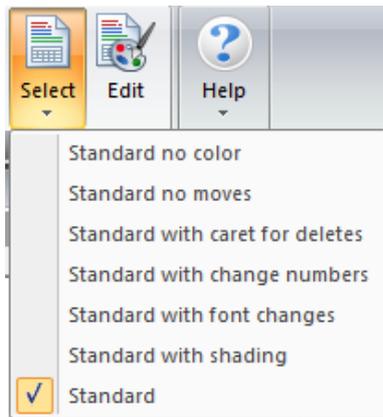
Workshare Compare re-runs the comparison using the selected mode and displays the resulting Redline document in the Workshare Compare main window.

## Applying a Different Rendering Set

You can re-run a comparison using a different rendering set.

### To re-run a comparison with a different rendering set:

1. Click **Select** in the Home or View Ribbon. A list of the currently defined rendering sets is displayed.



2. Select the rendering set to apply.

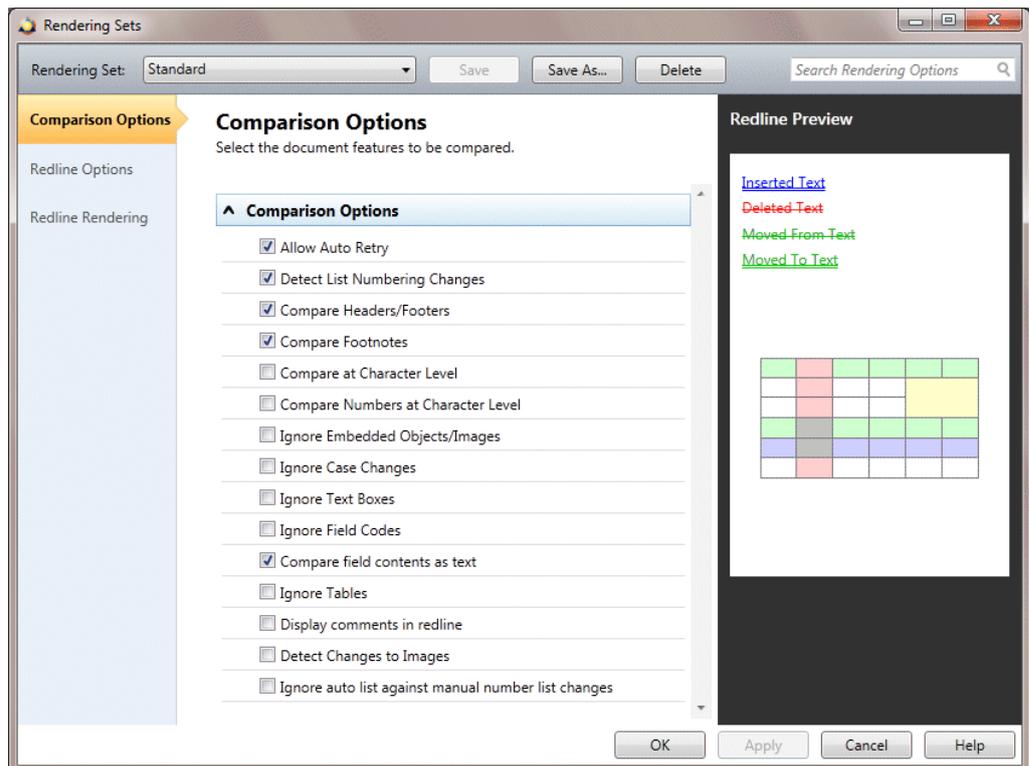
Workshare Compare re-runs the comparison using the selected rendering set and displays the resulting Redline document in the Workshare Compare main window.

## Changing the Comparison Options

You can re-run a comparison changing specific comparison options.

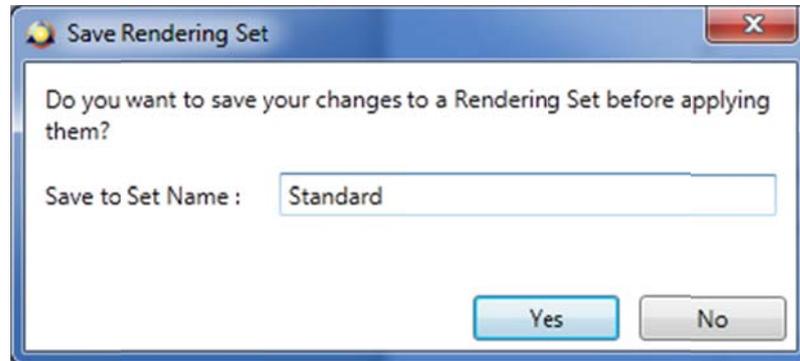
### To re-run a comparison with different options:

1. Click **Edit** in the Home or View Ribbon. The Rendering Sets Manager is displayed.



2. Edit the rendering set parameters as required. For example, select the **Ignore Tables** checkbox. Rendering set parameters are described in Rendering Set Parameters.
3. Do one of the following:
  - Click **Apply**. Workshare Compare re-runs the comparison using the selected parameters and displays the resulting Redline document in the Workshare Compare main window. Click **OK** to close the Rendering Sets Manager. Any changes you made to the rendering set parameters are lost.

- Click **OK**. The following dialog is displayed:



Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, ", /, \\ or |. Click **Yes**. Workshare Compare re-runs the comparison using the revised options and saves the revised options as the specified rendering set. Click **No**. Workshare Compare re-runs the comparison using the revised options and saves the revised options as a temporary rendering set called "Custom rendering set".

**Note:** The "Custom rendering set" will be selected in the Rendering Set dropdown list the next time the Rendering Sets Manager is opened. However, once you navigate away from the "Custom rendering set" and a different rendering set is selected and the Rendering Sets Manager is closed, the "Custom rendering set" is lost.

## Converting to Track Changes

If required you can implement the changes shown in the Redline document using Microsoft Word's track changes functionality. The Redline document can be opened in Microsoft Word and the insertions and deletions shown in the Redline document are converted into track changes which can then be reviewed and implemented as required.

**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 convert to track changes:

- Click **Convert to Track Change document** in the Review Ribbon or right-click in the Redline document and select **Convert to Track Changes**. The Redline document is opened in Microsoft Word as a DOC/DOCX file with the default name TrackChange\_Redline.doc/docx. All the changes are displayed as track changes.
- Review the track changes and implement them as required.
- Save the document. By default, TrackChange\_Redline.doc/docx is saved in a temporary folder. You can also use Save As to save the modified Redline document as a Microsoft Word file (or other format) and in a different location, as required.

## Importing Changes into the Original Document

You can import the changes detailed in the Redline document into the original document.

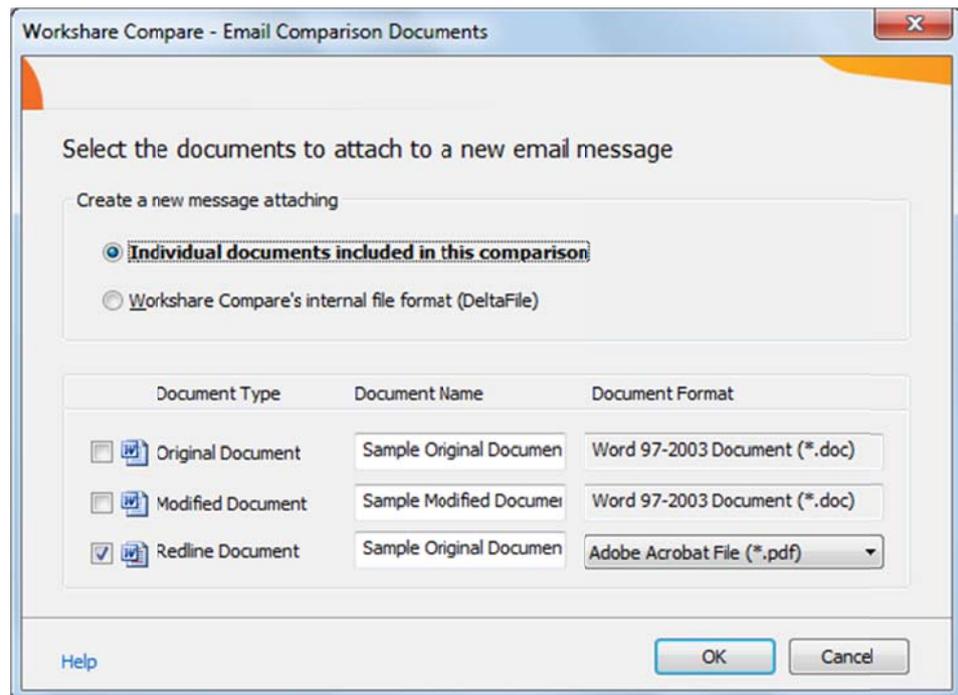
Click **Manage Changes** in the Home or Review Ribbon or select **Manage Changes** from the Logo menu. The changes detailed in the Redline document are imported into the original document. The original document and the Manage Changes page of the Workshare Panel are displayed. You can then select to incorporate the changes into the original document as required. Refer to **Error! Reference source not found.** for further information.

## Sending Compared Documents by Email

Workshare Compare integrates with your email system. You can send the Redline document as well as the original and modified documents as email attachments. You can also send the Redline document as a Microsoft Word file that shows the changes as track changes. This is useful if the recipient does not have Workshare Compare.

To send Redline documents by email:

1. Click **Email** then **Send as Comparison document** in the Review Ribbon or select **Email** then **Send as Comparison document** from the Logo menu. The *Email Comparison Documents* dialog is displayed.



2. Select the files to send by selecting one of the following options:
  - **Individual documents included in this comparison**  
Selecting this option displays a list of the documents included in the comparison in the lower pane. Select the checkboxes to the left of the documents you want to send.

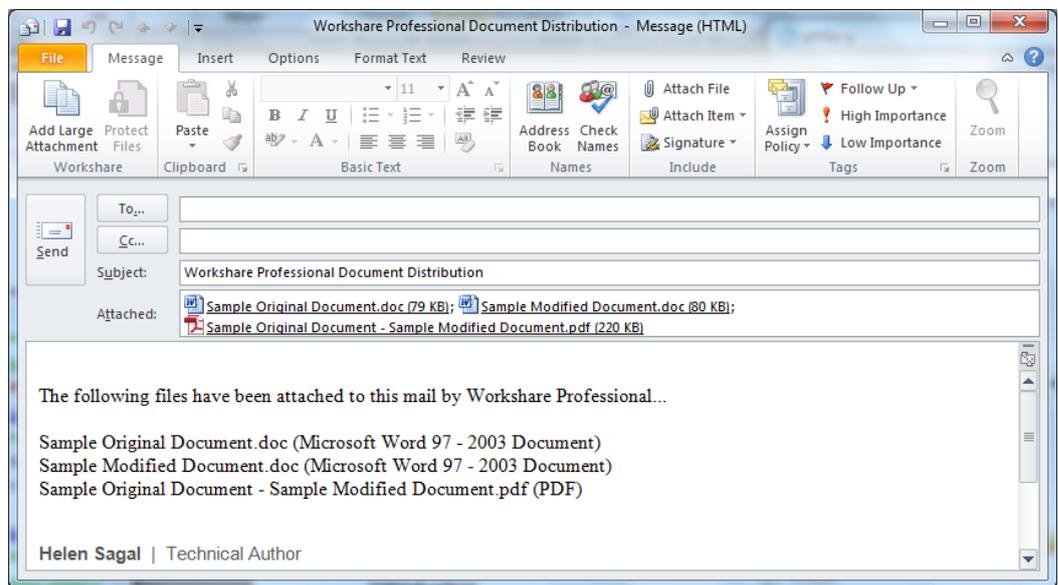
**Note:** The original and modified documents are sent in Microsoft Word format and the Redline document is sent by default as a PDF. Click in the **Document Format** field of the Redline document to change the default format, for example, to RTF.

▫ **Workshare Compare’s internal file format (DeltaFile)**

Selecting this option sends the compared documents as a DeltaFile. A DeltaFile contains the Redline document and a reference to the original and modified documents in the DMS. A DeltaFile can only be opened in Workshare Compare. The file extension for a DeltaFile is WDF.

**Tip!** Click in the **Document Name** field to change the name of the Redline document.

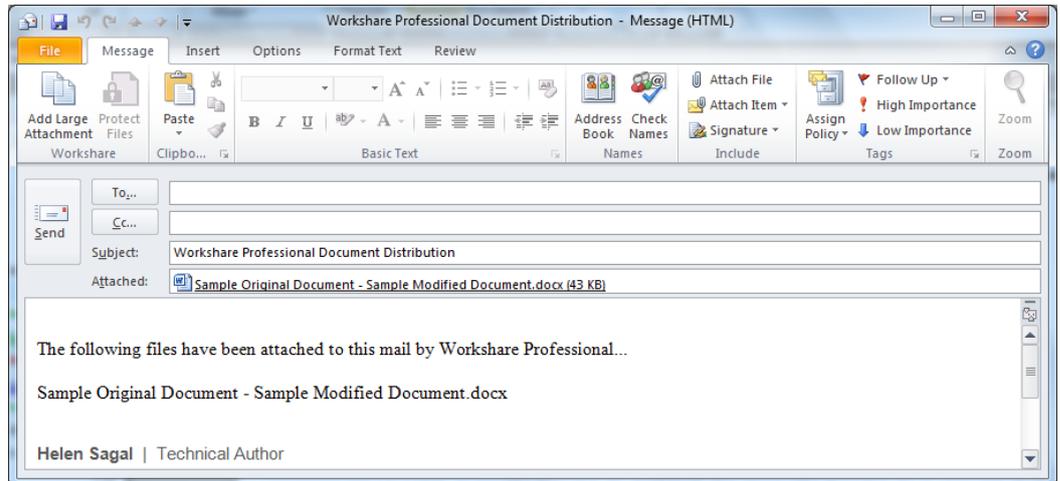
3. Click **OK**. An email message window is displayed with the selected files as attachments.



4. Enter the recipient(s) name and any other text you want to include and click **Send**.

**To send Redline documents with changes as track changes:**

1. Click **Email** then **Send as Track Changes document** in the Review Ribbon or select **Email** then **Send as Track Changes document** from the Logo menu. The Redline document is saved as a Microsoft Word document with the changes indicated by track changes and an email message window is displayed with the Microsoft Word file as an attachment.



2. Enter the recipient(s) name and any other text you want to include and click **Send**.

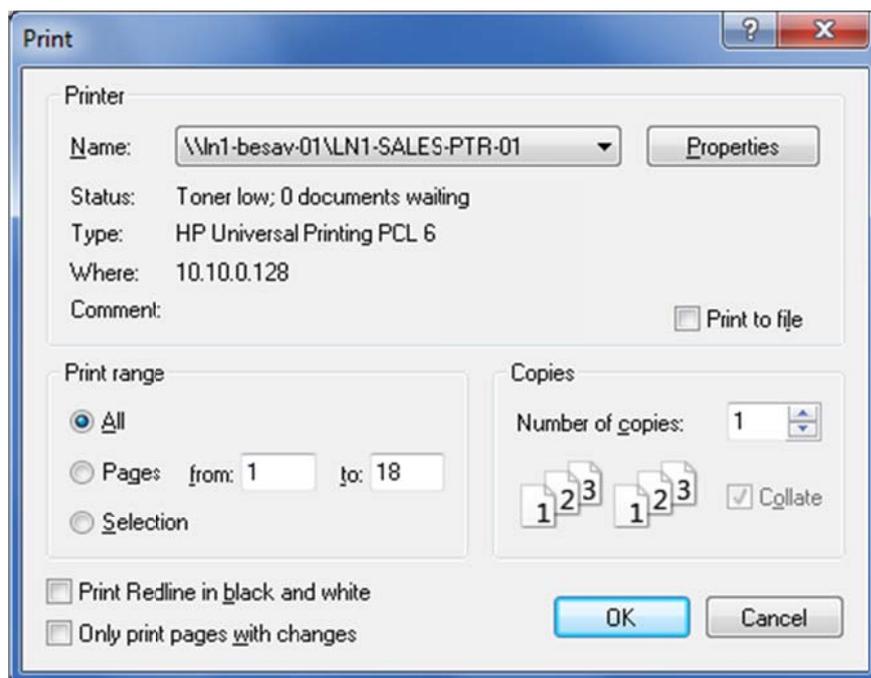
When the recipient opens the file in Microsoft Word, the changes are displayed as track changes.

## Printing Redline Documents

You can print the Redline document as well as either of the source documents.

### To print the comparison documents:

1. In the Home Ribbon or the from the Logo menu, click **Print** and then **Print Original**, **Print Modified** or **Print Comparison**. The *Print* dialog is displayed.



2. Select from the standard print options in the usual way.

The following two options are only available when selecting **Print Comparison**.

3. If you selected **Print Comparison**, and you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as color text may not appear clearly when printing in black and white.
4. If you selected **Print Comparison**, and you only want to print pages of the Redline document that include changes, select the **Only print pages with changes** checkbox.
5. Click **OK**.

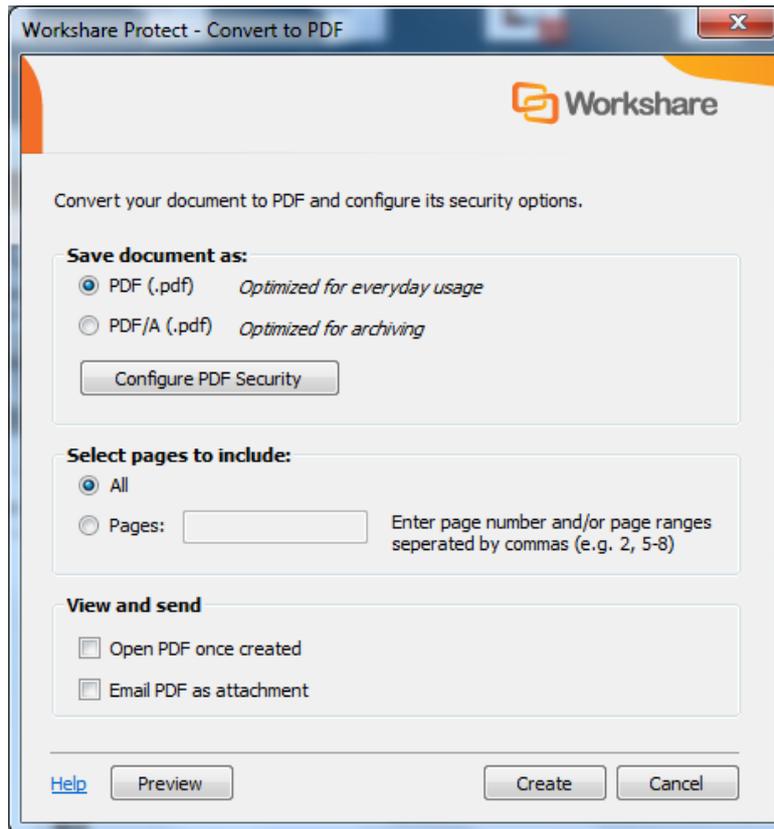
**Note:** You can preview the printed version of the Redline, original or modified document using the **Print Preview** options in the Logo menu.

## Converting Redline to PDF

You can convert the Redline document to PDF and save it locally or in your DMS or you can convert to PDF and email.

### To convert a Redline document to PDF:

1. In the Home Ribbon, click **PDF** and then **Convert to PDF**. The *Convert to PDF* dialog is displayed.



**Note:** This dialog displays slightly differently depending on whether you are working with a document saved in your DMS/CRM.

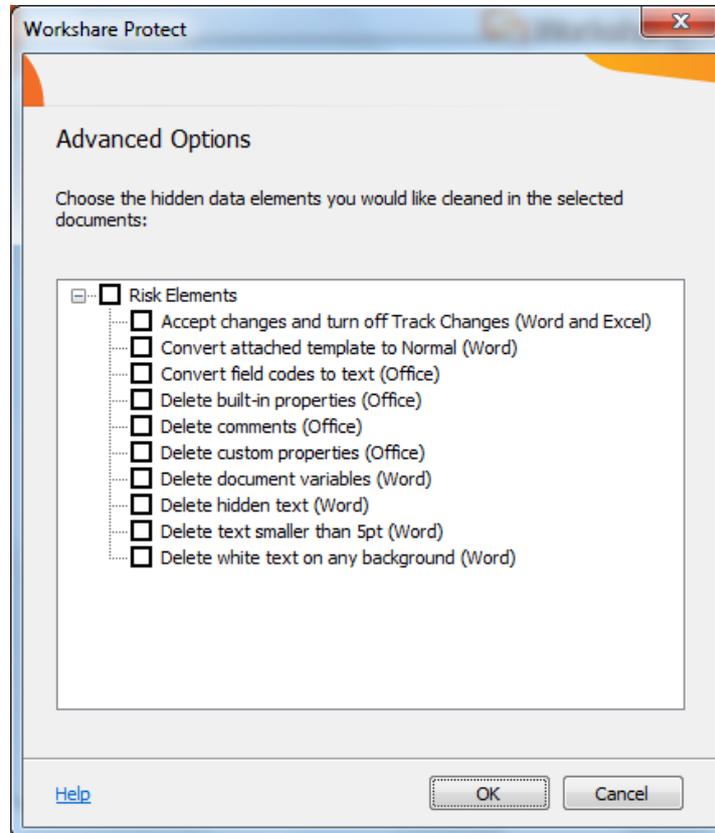
2. Select whether you want to convert the Redline to **PDF** or **PDF/A**.

3. If required, click **Configure PDF security** to set PDF security options as well as metadata cleaning options. The following dialog is displayed.



4. If you selected **PDF**, you can select one or more of the security options as required:
- **Prevent printing:** Prevents recipients from printing the PDF document.
  - **Prevent editing of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
  - **Prevent the copying of text and/or graphics:** Prevents recipients from copying graphics or text directly from the PDF document.
  - **Prevent comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.

- If you selected **PDF** or **PDF/A**, click **Cleaning Options** to specify what metadata to remove before converting the Redline to PDF.

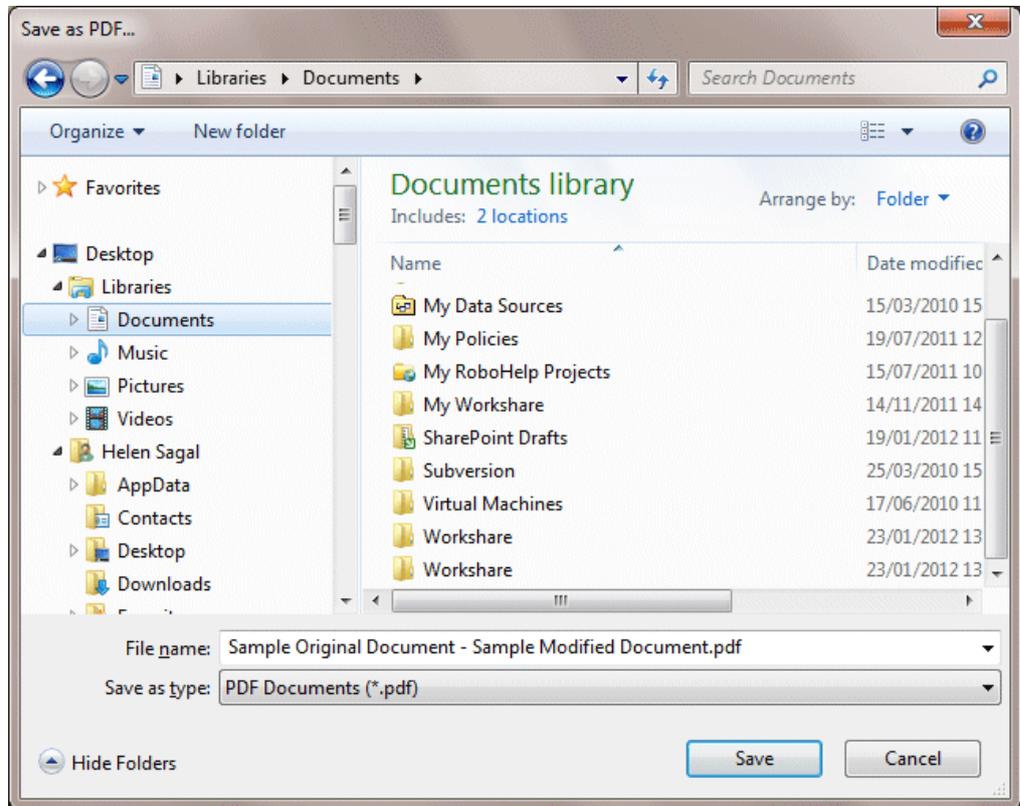


- Select metadata elements as required. For a full description of all the metadata elements, refer to **Error! Reference source not found.**, for further information.
- Click **OK**.
- If you selected **PDF**, you can set a password to protect the PDF by entering the password twice in the **Password protection** area. When a password is specified, the recipient can only open the PDF after entering this password.
- Click **Apply**.
- In the *Convert to PDF* dialog, when working with a DMS, select whether to save the PDF as a new document or as a related document or locally.
- If you want to create a PDF of part of the Redline 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.

- If required, click **Preview** to view the document as a PDF.
- Select the **Open PDF once created** checkbox, and the PDF is opened once it has been created.

14. Select the **Email PDF as an attachment** checkbox, and the PDF is attached to a new email message once it has been created.
15. Click **Create**. The *Save as* dialog is displayed:



16. Specify the name and location for the PDF file and click **Save**. The Redline document is converted to PDF.

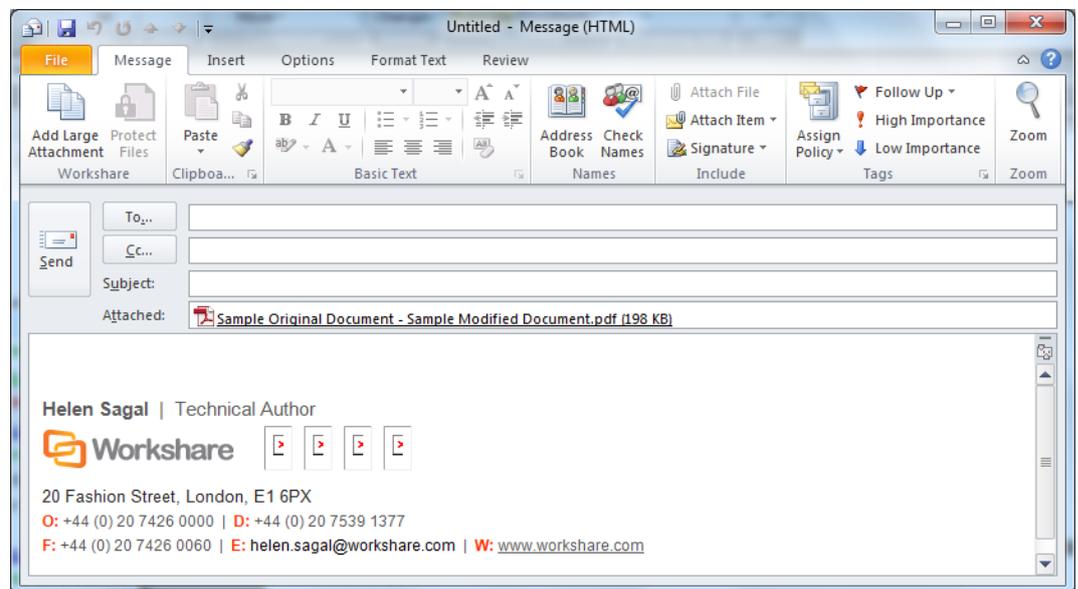
## Converting Redline to PDF and Sending by Email

You can convert the Redline document to PDF and send it by email.

### To convert a Redline to PDF and send by email:

1. In the Home Ribbon, click **PDF** and then **Convert to PDF and Email**. The *Convert to PDF* dialog is displayed.
2. Follow the procedure to convert a Redline document to PDF as described in steps 2 to 13 of the *Converting Redline to PDF* section.

After specifying a save location and clicking **Save**, an email message window is displayed with a PDF of the Redline document as an attachment.



3. Enter the recipient(s) name and any other text you want to include and click **Send**. The PDF document is sent to the specified recipients.

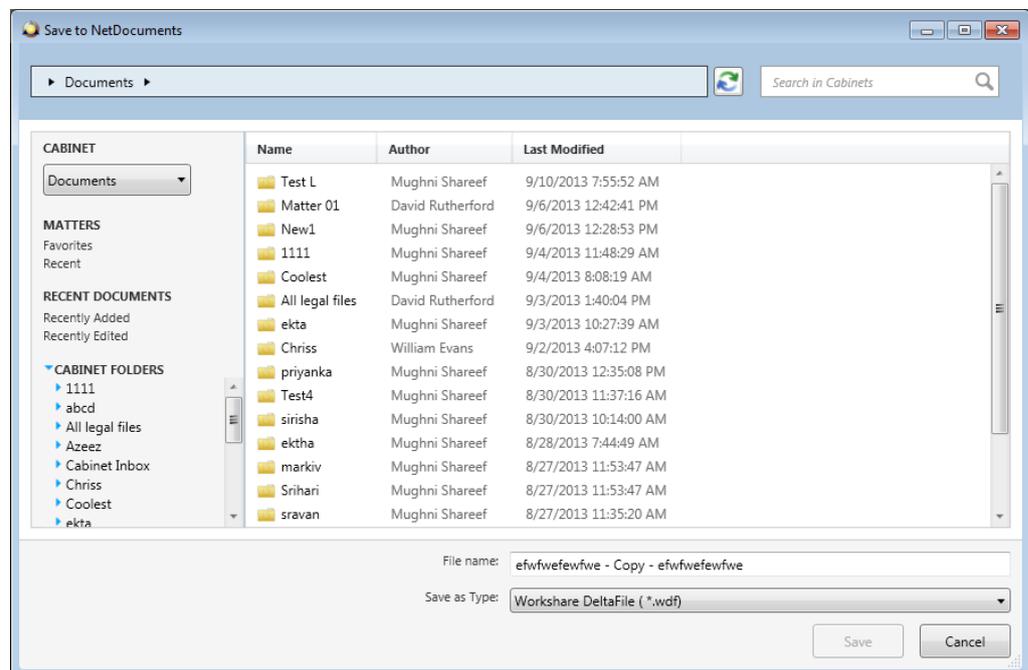
## Saving Redline Documents

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

You can save the Redline document to your DMS/CRM, SharePoint or locally. The following procedure describes how to save to NetDocuments as an example.

### To save the Redline document:

1. Click **Save** in the Quick Access Toolbar or select **Save** from the Logo menu. The *Save to NetDocuments* dialog is displayed.



**Note:** If you are not working with a DMS or SharePoint, the *LocalStore Save As* dialog is displayed or if you click **Cancel** in this dialog, a message is displayed asking if you would like to save the Redline document locally.

**Tip!** If you are working with a DMS or SharePoint but both documents compared are local documents, then you can press the **Shift** key while clicking **Save** and the *LocalStore Save As* dialog is displayed.

2. Browse to the location where you want to save the comparison and modify the name of the comparison as required.

- 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 document 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 document as a Microsoft Word file. The source documents are not saved.
<b>Text Only (*.txt)</b>	Saves the Redline document as a text file. The source documents are not saved.
<b>Rich Text Format (*.rtf)</b>	Saves the Redline document as an RTF file. The source documents are not saved.
<b>HTML Document (*.htm)</b>	Saves the Redline document as a HTML document. The source documents are not saved.
<b>Adobe Acrobat File (*.pdf)</b>	Saves the Redline document as a PDF file. The source documents are not saved.
<b>Adobe Acrobat PDF/A File (*.pdf)</b>	Saves the Redline document as a PDF/A file. The source documents are not saved.

- Click **Save**.

## Saving Redline as Track Change Document

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

### To save Redline documents with changes as track changes:

- From the Logo menu, click **Save As** then **Save As Track Change document**.
- In the Save dialog displayed, specify a name and save location for the track change document and click **Save**. The Redline document 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.

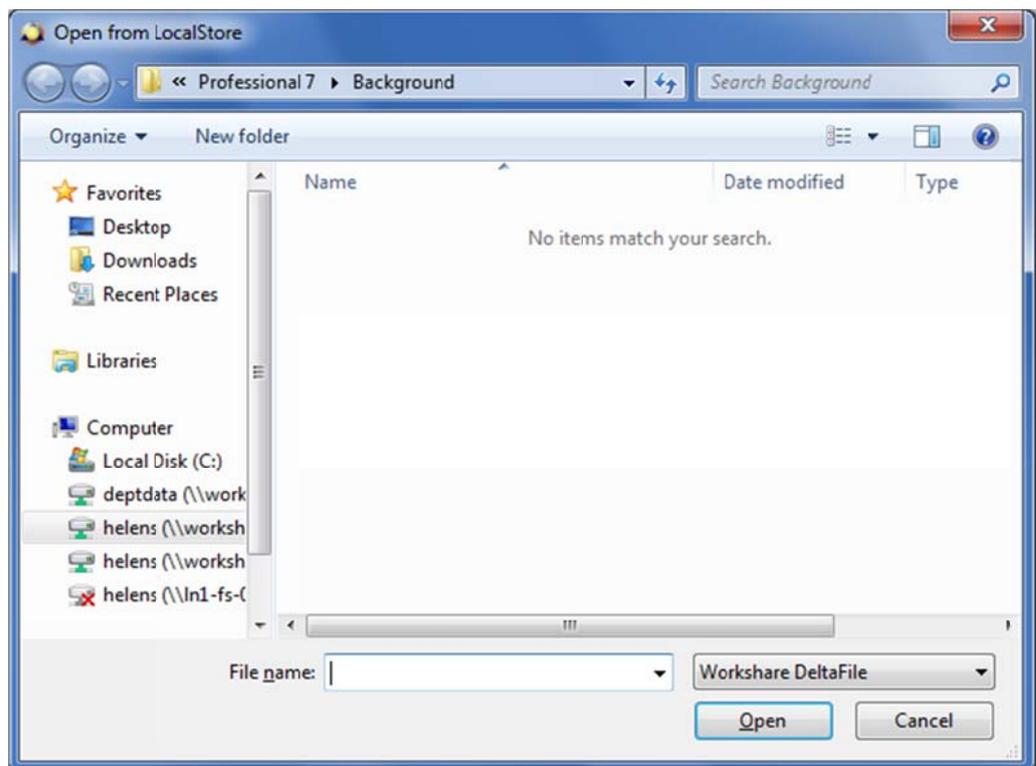
## Opening Saved Workshare DeltaFiles

When a comparison has been saved as Workshare DeltaFile, you can open it from Workshare Compare.

### To open a saved comparison:

1. Click **Open** in the Home Ribbon or select **Open** from the Logo menu. An *Open* dialog is displayed.

**Note:** Clicking **Open** when you work with a DMS/CRM or SharePoint accesses the DMS/CRM or SharePoint. To open from a local or network drive, hold the Shift key down when clicking **Open** or click **Cancel** in the DMS/CRM or SharePoint open dialog.

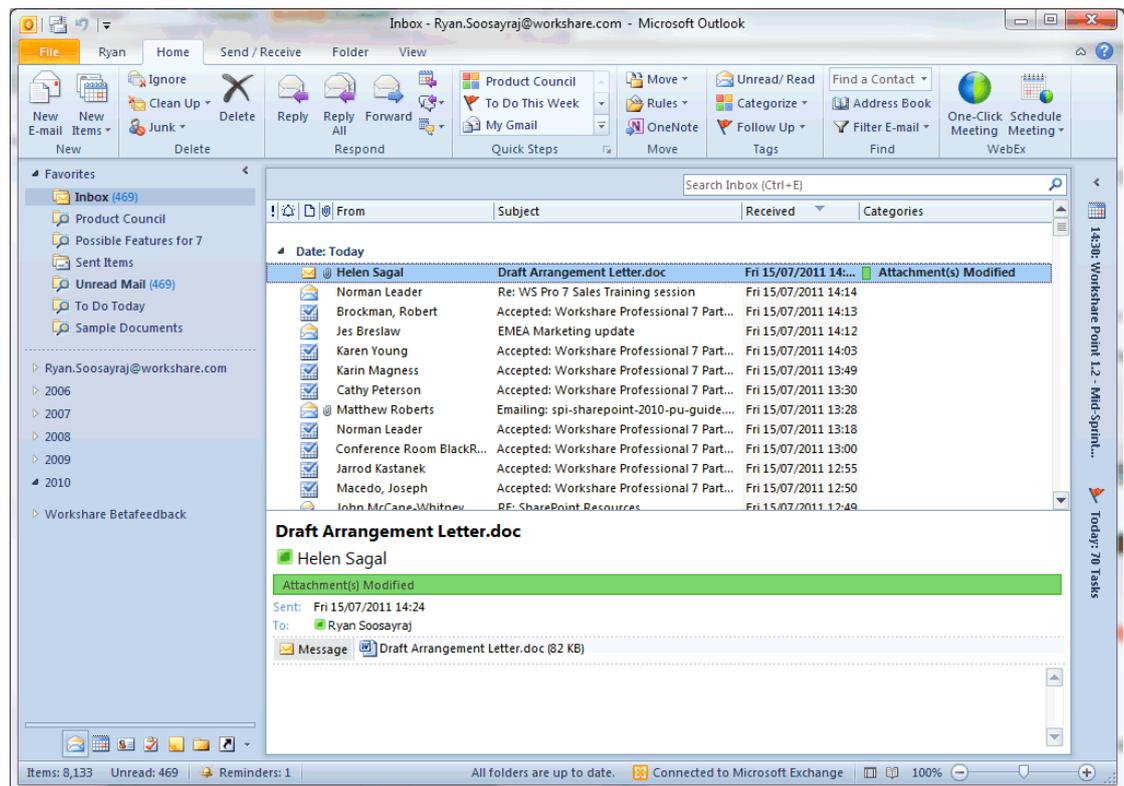


2. Navigate to the location where the comparison is saved and select the WDF file you want to open.
3. Click **Open**. The selected comparison is opened in Workshare Compare. The source documents and the Redline document are displayed.

## Alert and Compare - Generating Redlines from Outlook

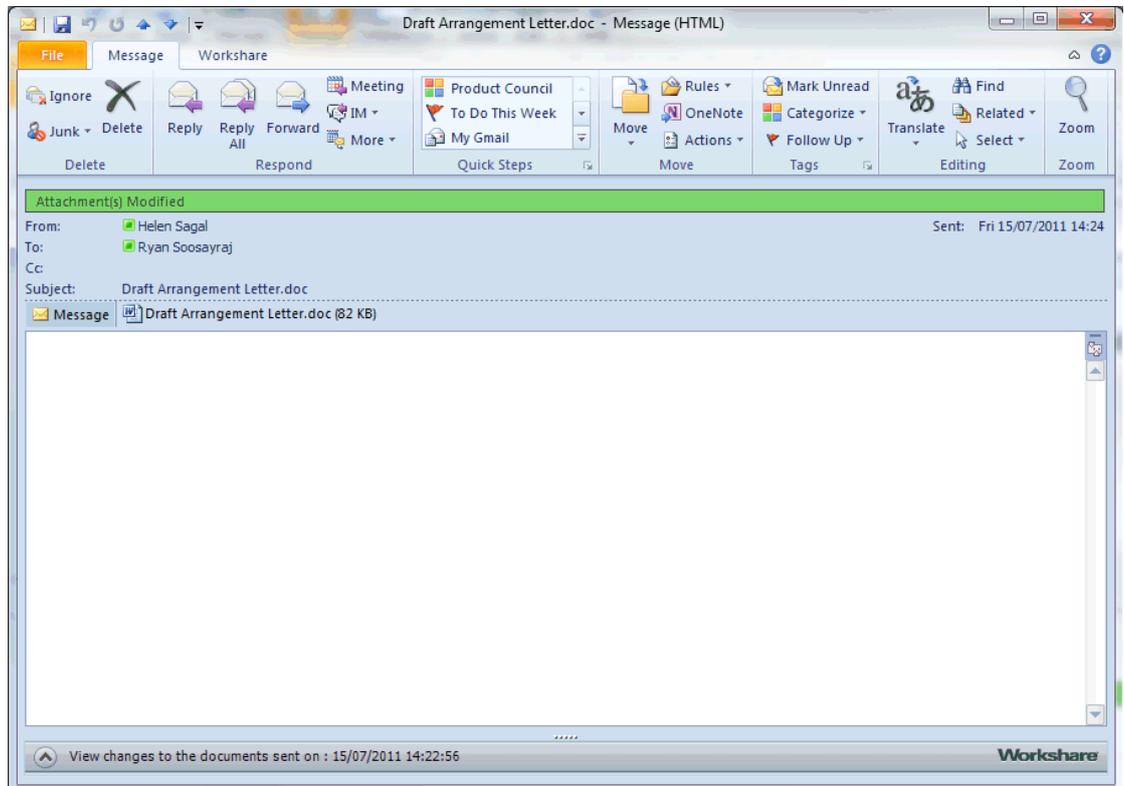
Alert and Compare is the ability of Workshare Compare to automatically detect that a received attachment is a changed version of an original document sent previously.

When a user sends a document to a recipient and the recipient edits the document and sends it back to the user, Workshare Compare can automatically detect that the received attachment is a changed version of the original document. The user can then launch a comparison of the two documents from Microsoft Outlook and view the Redline document in Workshare Compare.

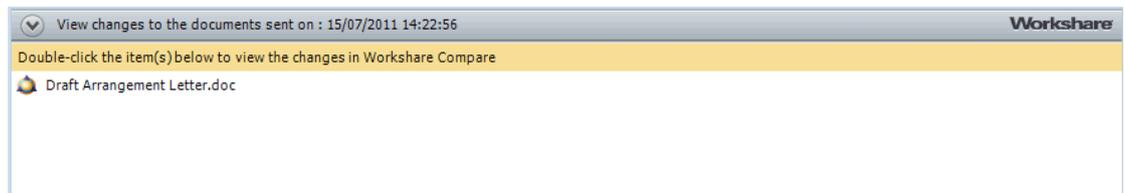


An email is flagged by displaying "Attachment(s) Modified" in the Categories column and a green bar across the top of the email in the Reading Pane. You can quickly see that the email includes an attachment that you have previously sent out and that has now been modified.

When you open an email that has been flagged, the green bar is shown across the top of the message window.



To view a comparison between the document you sent out and the document attached to this email, click the arrow to expand the Workshare view section at the bottom of the email window.



The list shows the attachment(s) that are modified versions of a document you have previously sent out and also shows if the name of the original document has been changed.

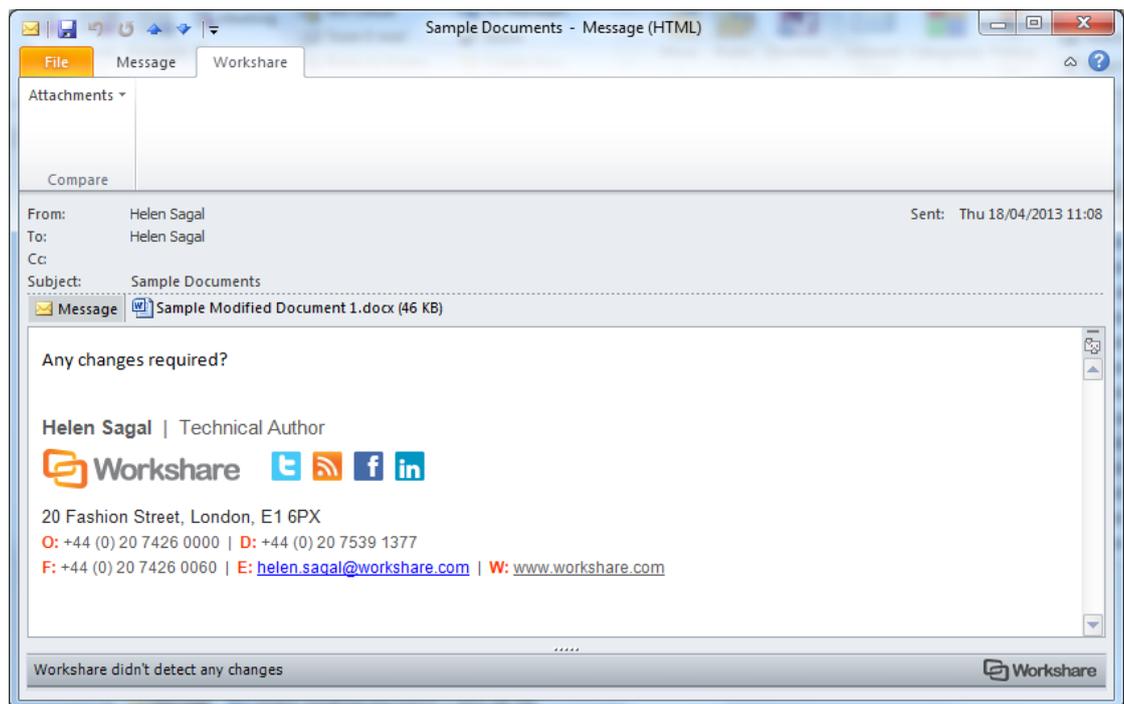
Double-click an attachment. Workshare Compare is launched and a comparison is run using the document you sent out previously as the original document and the attachment to the open email as the modified document. All changes can be seen in the Redline document and the Change Summary window.

## Comparing an Attachment

When you receive an email with a Microsoft Word attachment, Workshare Compare enables you to compare the attachment with any document on your local file system, SharePoint or DMS. This feature can be used to compare the attached file with a previous version or another document on your computer.

### To compare an attachment from Microsoft Outlook:

Click the **Attachments** dropdown list that appears in the *Workshare* tab and select the attachment you want to compare.



The *Document Selection* dialog is displayed with the selected attachment in the **Original Document** field. Select the files to compare it against as described in *Performing Comparisons*.

## Chapter 5. Configuring Workshare

This chapter describes the Workshare Configuration Manager. It includes the following sections:

- **Introducing the Workshare Configuration Manager**, below, introduces the Workshare configuration utility.
- **Accessing the Workshare Configuration Manager**, below, describes how to access the Workshare Configuration Manager.
- **Setting Parameters**, page 80, describes how to set values for parameters in the Workshare Configuration Manager.

### Introducing the Workshare Configuration Manager

The Workshare Configuration Manager is a configuration utility that enables you to configure Workshare and the way it behaves as well as modify the configuration of the Client Default profile (via the parameters in the **Protection** category).

***Note:** A profile is a collection of policies. A policy is a set of parameters applied by Workshare Protect when determining content risk.*

### Administrator Mode and User Mode

The Workshare Configuration Manager has two modes as follows:

- **Administrator Mode:** This mode is for administrators to make changes to the default settings on the local machine. Settings made are saved in HKEY\_LOCAL\_MACHINE in the Registry. As a user you will only have access to Administrator mode if you have Administrator rights.
- **User Mode:** This mode is for users to make changes to the Workshare configuration to suit their own personal preferences on the local machine. Other users could log in and they would not have the same configuration settings. Settings made are personal to the user and saved in HKEY\_CURRENT\_USER in the Registry.

***Note:** Your system administrator may have restricted the rights of users to modify configuration parameters by locking individual parameters so that users cannot override the setting. If you have restricted access rights and have special requirements for configuration, please speak to your system administrator.*

### Accessing the Workshare Configuration Manager

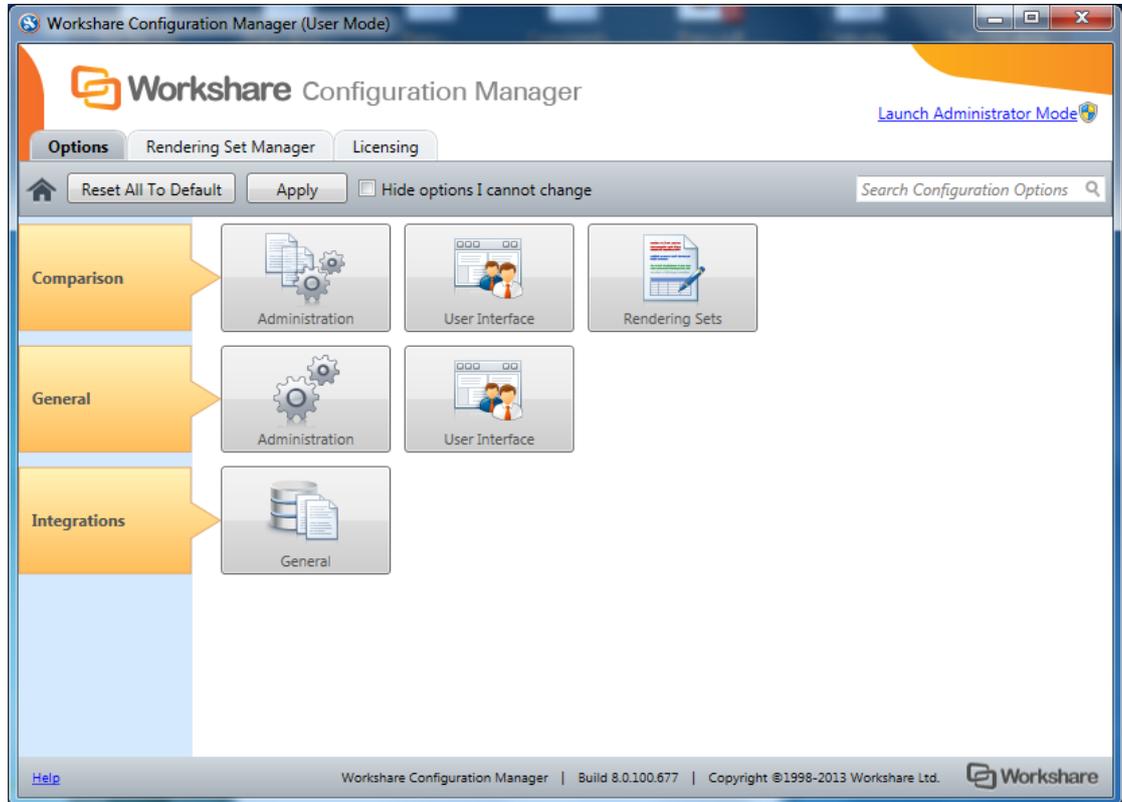
The Workshare Configuration Manager can be accessed from within Microsoft Word or from the Start menu.

**To access the Workshare Configuration Manager from Microsoft Word:**

- In Microsoft Word, click **Options** in the *Workshare* tab, **Options** group. The Workshare Configuration Manager opens in User Mode.

**To access the Workshare Configuration Manager from the Start menu:**

- From the Start menu, select **All Programs > Workshare > Workshare Configuration**. The Workshare Configuration Manager opens in User Mode.

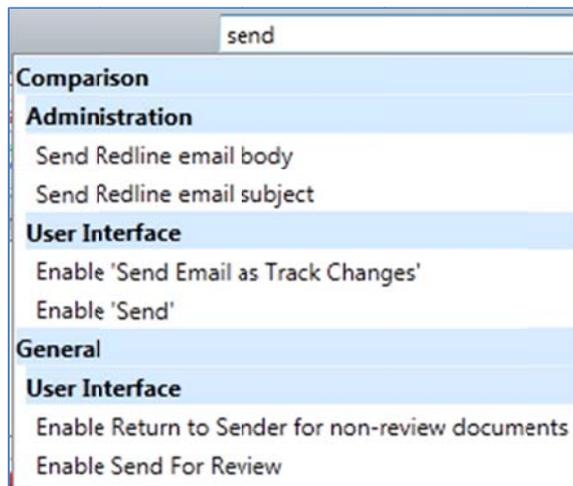


**Note:** In User Mode, the state of the options reflects the settings in `HKEY_CURRENT_USER` in the Registry.

The configuration parameters for Workshare are grouped into categories and sub-categories. Click a sub-category to display the parameters for that sub-category. The different sub-categories and their parameters are described in *Workshare Configuration Options*.

## Searching Parameters

If you know the name of a parameter (or part of its name) but not its location, you can search the Workshare Configuration Manager using the search box on the top right.



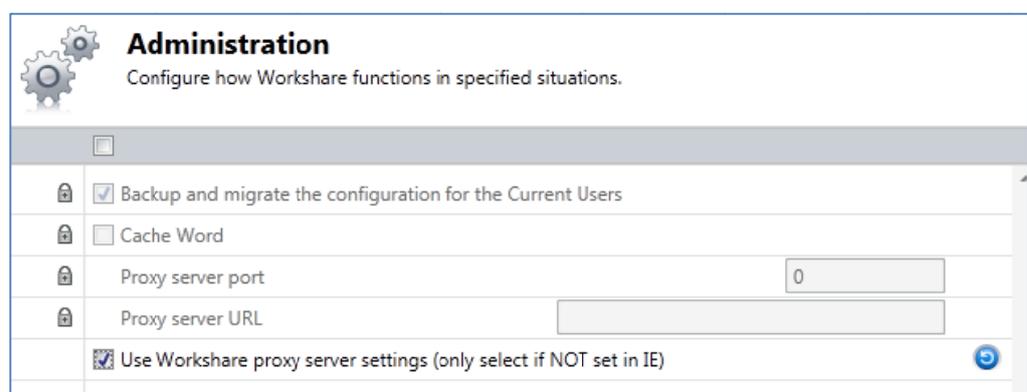
Click the parameter in the results list and the relevant category and sub-category is displayed in the Workshare Configuration Manager.

## Setting Parameters

Most parameters in the Workshare Configuration Manager are set by selecting or deselecting a checkbox. There are also some that require you to enter a value in a text box.

### To specify parameters:

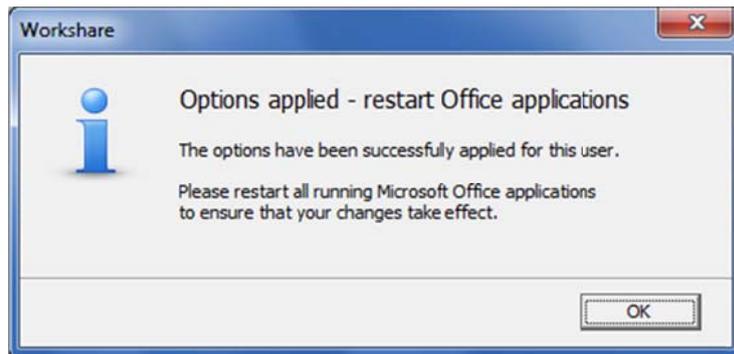
1. In the Workshare Configuration Manager, select a category and then a sub-category.
2. Set a value for a parameter by selecting or deselecting the checkbox, selecting an option from a dropdown list or entering a value in a text box.



The  icon to the right of a parameter indicates that the parameter value has been changed.

**Note:** When parameters have been locked by your administrator, the parameter will be disabled and a lock symbol will appear to the left of the parameter. You cannot change locked parameters.

3. Continue to select categories and sub-categories and specify parameters as required.
4. Click **Apply** to save your settings. A confirmation message is displayed once the settings have been saved.



5. Click **OK** and restart all Microsoft Office applications.

**Note:** The different sub-categories and their parameters are described in *Workshare Configuration Options*.

## Appendix A. Configuring Rendering Sets

This appendix describes how to configure rendering sets in Workshare Compare and apply them to a comparison. It includes the following sections:

- **Introducing Rendering Sets**, below, introduces Workshare rendering sets and describes how they determine the look of a Redline document.
- **Accessing the Rendering Sets Manager**, page 84, describes how to access the Workshare Rendering Sets Manager.
- **Customizing Rendering Sets**, page 87, describes how to create your own rendering sets as well as modify and delete existing rendering sets.
- **Rendering Set Parameters**, page 89, provides a detailed description of all the parameters included in rendering sets.

### Introducing Rendering Sets

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Workshare Compare uses colors and different formats in the Redline document to enable you to see the changes that have been made to the documents.

For example, the following indications can be used:

- Deletions in ~~red with a strikethrough~~
- Insertions in bright blue with a double underline
- Moved or cut text in ~~green with a strikethrough~~
- Pasted (copied) text in green with a double underline
- Moved deletions in ~~salmon pink with a strikethrough~~

The colors and formats adopted depend on the rendering set applied to the comparison. Workshare Compare includes several different rendering sets that you can apply as required or you can modify these rendering sets or create your own rendering set.

**Note:** *It is general practice that your system administrator will have been involved in creating a set of standard rendering sets for your company to use and may have restricted the rights of users to create, delete or modify their own rendering sets. If you have restricted access rights and have special requirements for rendering sets, please speak to your system administrator.*

## Where are Rendering Sets Stored?

By default, rendering sets are stored in the following locations:

- Machine-wide rendering sets are stored in a shared documents folder at the following location: C: Users > Public > Public Documents > Workshare > Rendering.
- Personal rendering sets are stored in C: Users > (user name) > My Documents > Workshare > Rendering. This can be changed by an administrator in the **Default rendering set location** parameter in the Workshare Configuration Manager (**Comparison > Administration** category).

You can store rendering sets at other locations but you must specify the location (or locations) in the **Additional locations for rendering sets** parameter in the Workshare Configuration Manager (**Comparison > Administration** category). Workshare Compare looks in the two default locations (specified above) to create a list of the possible rendering sets available and will also look in any additional locations specified in this parameter.

## Applying Rendering Sets

You apply a rendering set to a comparison before the comparison is run and in Workshare Compare you can also apply a rendering set at any time after a comparison has been performed.

**To apply a rendering set after the comparison has been run:**

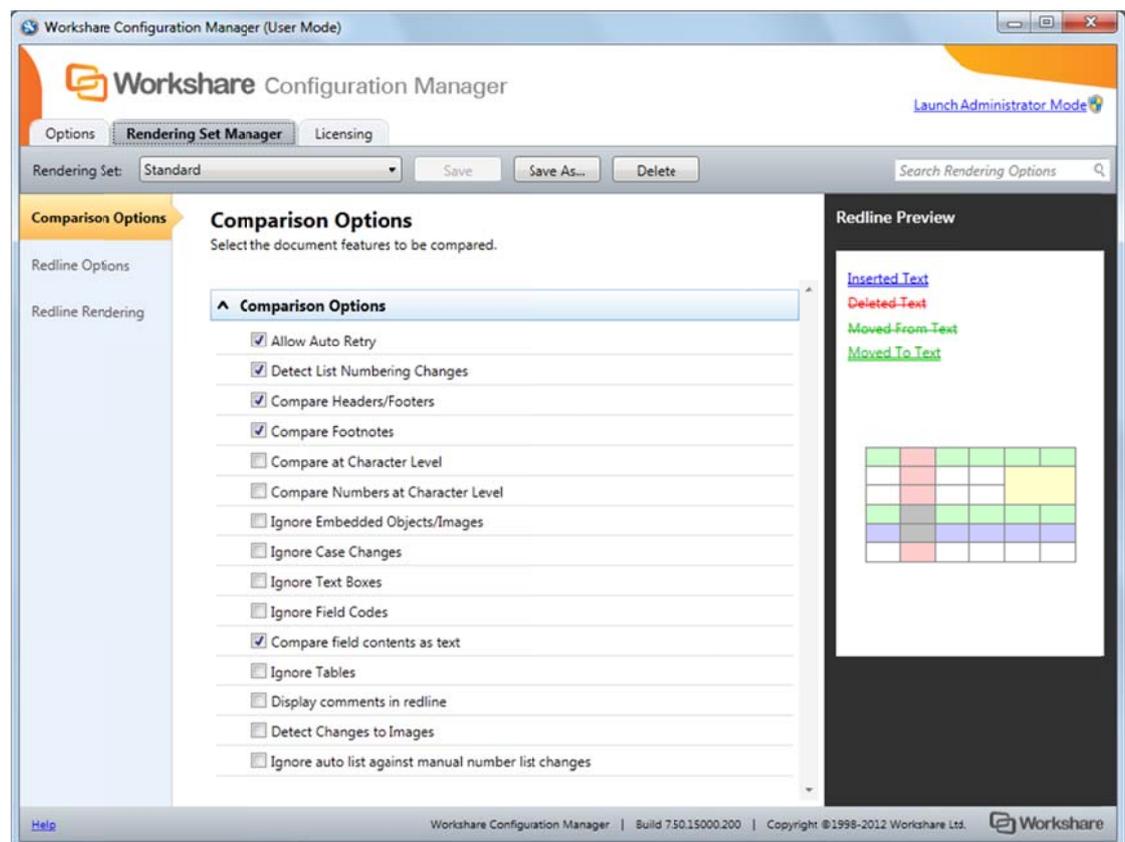
- Refer to Applying a Different Rendering Set
- Refer to Changing the Comparison Options

## Accessing the Rendering Sets Manager

The Rendering Sets Manager is accessible from the Workshare Configuration Manager, from Workshare Compare and from Microsoft Word.

### From the Workshare Configuration Manager

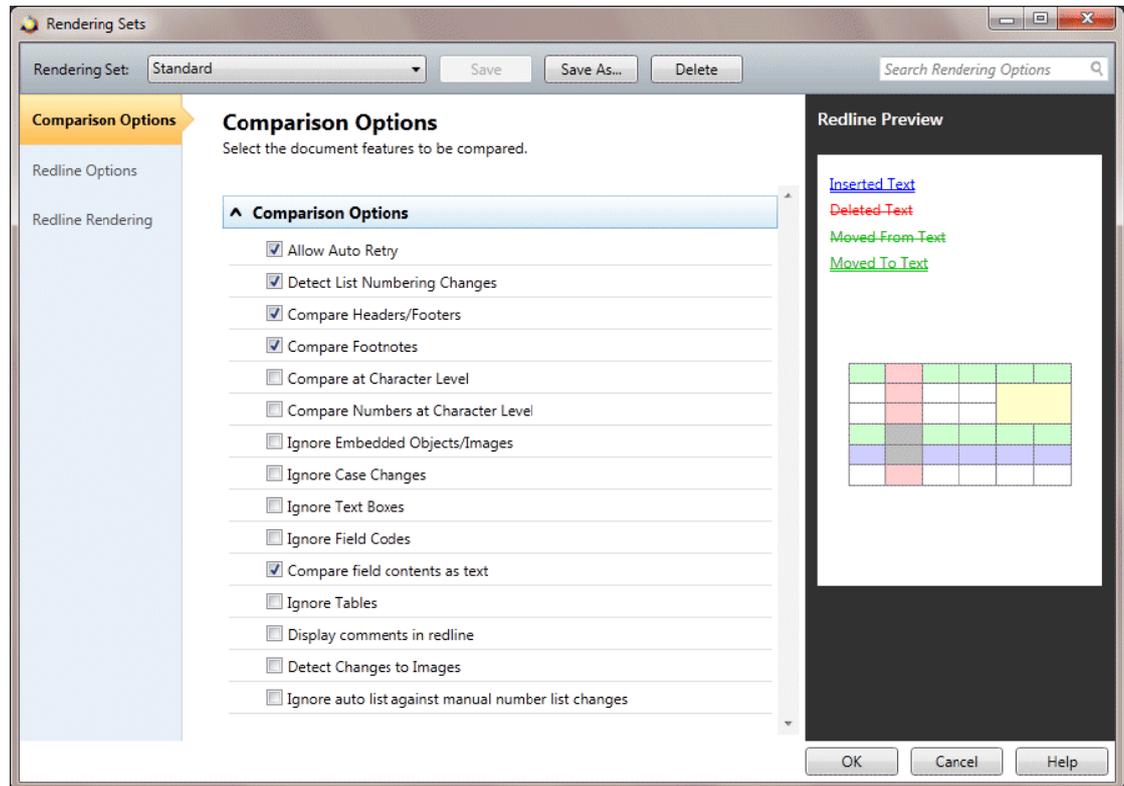
Access the Workshare Configuration Manager and select the Rendering Set Manager tab.



If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to Customizing Rendering Sets.

## Before Running a Comparison

Before running a comparison, click  in the *Compare Documents* dialog or click **Edit rendering set** in the Compare Documents page of the Workshare Panel.



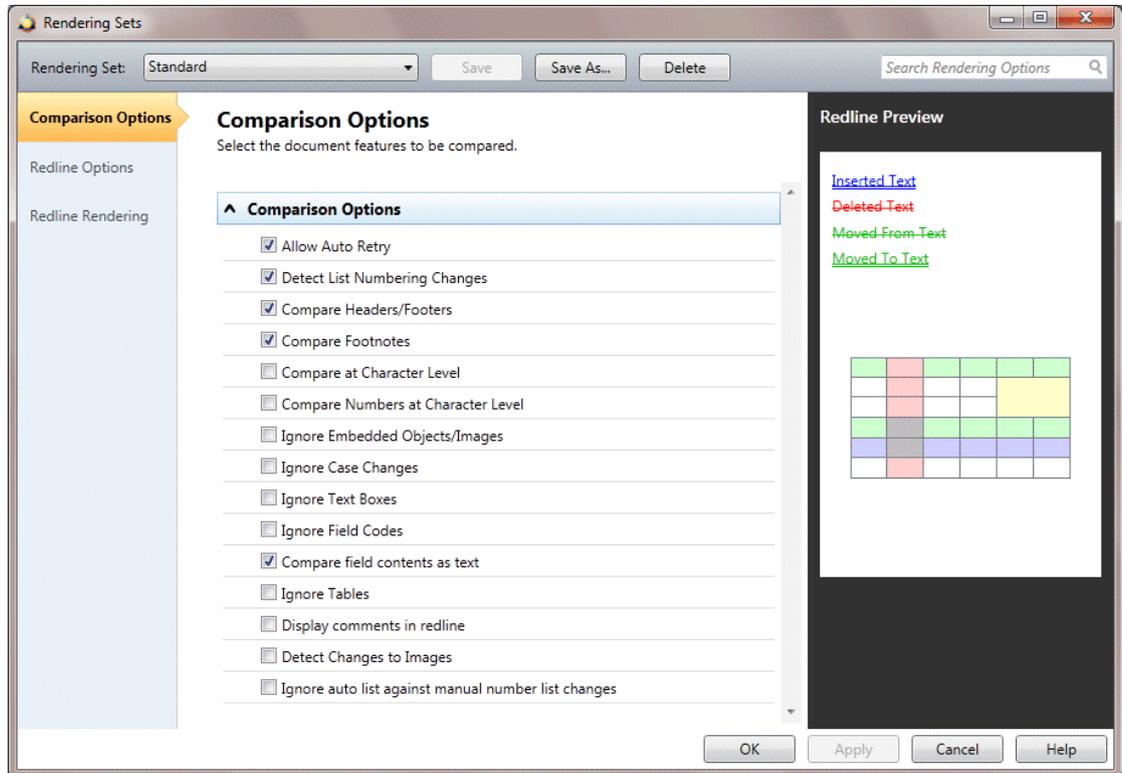
If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to Customizing Rendering Sets.

Additionally, you can edit the rendering set parameters as required and click **OK**. The *Save Rendering Set* dialog is displayed where you can either:

- Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, ", /, \\ or |. Click **Yes**. The updated rendering set is saved and it is selected in the *Compare Documents* dialog or the Compare Documents page of the Workshare Panel.
- Click **No**. The revised options are saved as a temporary rendering set called "Custom rendering set" and this rendering set is selected in the *Compare Documents* dialog or the Compare Documents page of the Workshare Panel.

## After Running a Comparison

In the Workshare Compare main window, click **Edit** in the Home ribbon (**Rendering Sets** group).



If you have permissions, you can modify and delete existing rendering sets and create new rendering sets. Refer to Customizing Rendering Sets.

Additionally, you can re-run a comparison changing specific comparison options. Refer to Changing the Comparison Options.

## Customizing Rendering Sets

If you have the relevant access rights, you can modify and delete existing rendering sets as well as create new rendering sets.

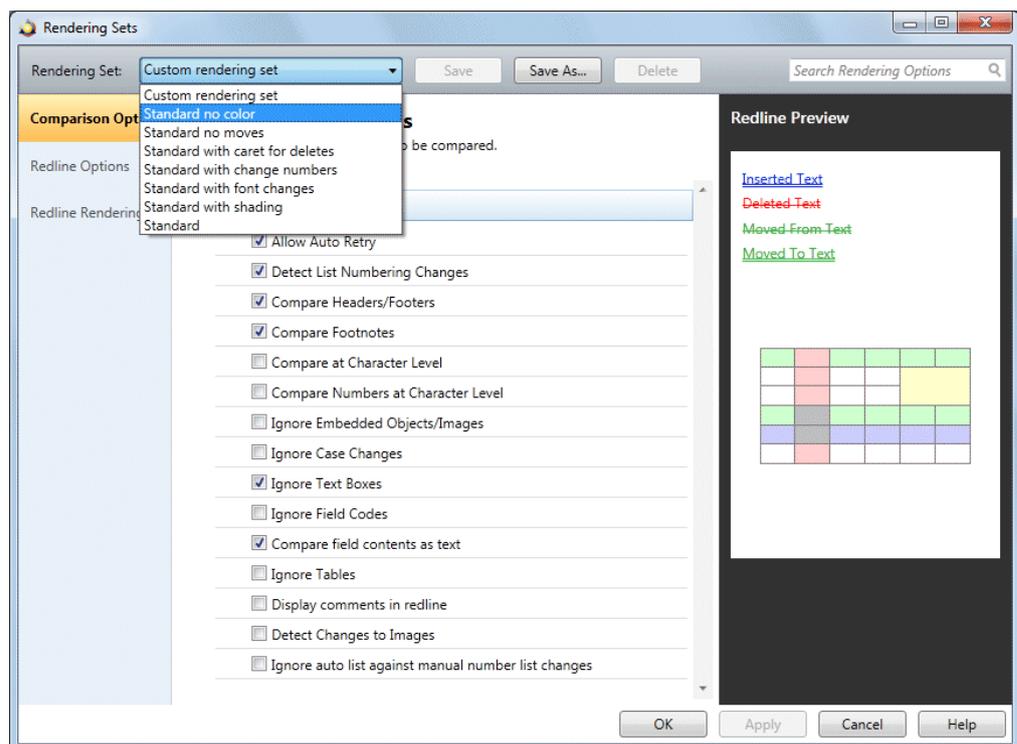
**Note:** Depending on how Workshare Compare has been distributed through the company, you may or may not have access rights to configure rendering sets. If you have any questions about your access rights, please speak to your system administrator.

## Modifying Existing Rendering Sets

If you have permission, you can modify the settings of an existing rendering set.

**To modify an existing rendering set:**

1. In the Rendering Sets Manager, select the rendering set you want to modify from the **Rendering Set** dropdown list.



2. Configure or modify the parameters for the rendering set as follows:
  - Click a category in the left pane to display parameters for that category in the right pane.
  - Configure the parameters as required.

Categories and their parameters are described in Rendering Set Parameters.

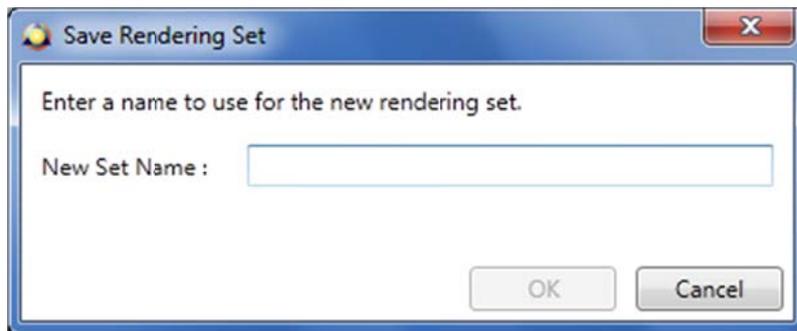
3. Click **Save**. The modified settings are saved to the selected rendering set.

## Creating New Rendering Sets

If you have permission, you can create a new rendering set. You create a new rendering set based on an existing rendering set and then modify it as required.

### To create a new rendering set:

1. In the Rendering Sets Manager, select the rendering set on which you want to base your new rendering set from the **Rendering Set** dropdown list.
2. Click **Save As**. The *Save Rendering Set* dialog is displayed:



3. Enter a name for the rendering set. Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, /, \ or |.
4. Click **OK**. The new rendering set is selected in the **Rendering Set** dropdown list.
5. Configure or modify the parameters for the rendering set as follows:
  - Click a category in the left pane to display parameters for that category in the right pane.
  - Configure the parameters as required.

Categories and their parameters are described in Rendering Set Parameters.
6. Click **Save**. The settings are saved to your new rendering set.

## Deleting Rendering Sets

If you have permission, you can delete rendering sets from the Rendering Sets Manager.

### To delete a rendering set:

1. In the Rendering Sets Manager, select the rendering set that you want to delete from the **Rendering Set** dropdown list.
2. Click **Delete**. The selected rendering set is deleted.

## Rendering Set Parameters

The parameters for rendering sets are grouped into the following categories:

- Comparison Options.
- Redline Options
- Redline Rendering

The categories appear in the left pane of the Rendering Sets Manager. Selecting a category displays the parameters for that category in the central pane. The right hand pane show a preview of how the Redline document will look with the parameters selected.

### Comparison Options

The screenshot shows the 'Rendering Set: Standard' interface. The left sidebar has 'Comparison Options' selected. The central pane, titled 'Comparison Options', contains a list of 15 options with checkboxes:

- Allow Auto Retry
- Detect List Numbering Changes
- Compare Headers/Footers
- Compare Footnotes
- Compare at Character Level
- Compare Numbers at Character Level
- Ignore Embedded Objects/Images
- Ignore Case Changes
- Ignore Text Boxes
- Ignore Field Codes
- Compare field contents as text
- Ignore Tables
- Display comments in redline
- Detect Changes to Images
- Ignore auto list against manual number list changes

The right pane, 'Redline Preview', shows a document with the following text: Inserted Text (blue), ~~Deleted Text~~ (red), Moved From Text (green), and Moved To Text (green). Below the text is a 5x5 grid with colored cells: Row 1 (Green, Red, Green, Green, Green), Row 2 (White, Red, White, White, Yellow), Row 3 (Green, Green, Green, Green, Green), Row 4 (Blue, Grey, Blue, Blue, Blue), Row 5 (White, Red, White, White, White).

The **Comparison Options** category includes parameters that enable you to customize how the compare is performed.

The Comparison Options parameters are described in the following table:

Parameter	Description
<b>Allow Auto Retry</b>	When selected, if a comparison fails for any reason then Workshare Compare automatically attempts to perform a comparison using reduced settings. Workshare Compare methodically and automatically disables the Comparison Options selected until it is able to perform a comparison.

Parameter	Description
<b>Detect List Numbering Changes</b>	If selected, changes to automatically generated list numbers for numbered paragraphs are detected.
<b>Compare Headers/Footers</b>	If selected, the headers and footers in the original and modified documents are compared.
<b>Compare Footnotes</b>	If selected, the footnotes in the original and modified documents are compared.
<b>Compare at Character Level</b>	If selected, words that are only slightly different from each other are compared. For example, if <b>banana</b> has been changed to <b>bananas</b> - Workshare Compare shows just an insertion of an <b>s</b> in the Redline document, rather than showing a deletion of <b>banana</b> and an insertion of <b>bananas</b> . This is intended to catch simple typing mistakes.
<b>Compare Numbers at Character Level</b>	As above description, but compares numbers instead of characters.
<b>Ignore Embedded Objects/Images</b>	<p>If selected, embedded objects and images are ignored while doing the comparison and will not be displayed in the Redline document.</p> <p>If not selected, the embedded objects and images will appear in the Redline (although changes to them are not detected unless the <b>Detect changes to Images</b> parameter is selected.)</p> <p>This option is useful when documents have very large images embedded in them which would produce vast amounts of data if written to the Redline RTF file and would slow down the comparison process and the loading of the Redline document.</p>
<b>Ignore Case Changes</b>	If selected, any case changes, for example, upper case to lower case, made in the modified document are ignored.
<b>Ignore Text Boxes</b>	If selected, any text boxes in the modified document are ignored.
<b>Ignore Field Codes</b>	<p>If selected, fields are treated as the same even if their field codes differ. So if you have a Date field in the original document and an Author field in the same place in the modified document, the Redline document will not show a change.</p> <p>If not selected, field codes are compared and where they have changed, the entire original field is shown as deleted and the entire modified field is shown as inserted.</p>

Parameter	Description
<b>Compare field contents as text</b>	<p>If selected, converts certain field codes to text and then compares. If not selected, compares field code only. Fields converted to text will not be subject to the Ignore Field Codes parameter if that is also selected.</p> <div style="border: 1px solid blue; padding: 5px; margin: 10px 0;"> <p><b>Note:</b> The following field codes are converted to text: TOC, REF, TOA, TA, DATE, TIME, COMMENTS, KEYWORDS, AUTHOR, FILENAME, SAVEDATE, CREATEDATE, PAGEREF, INDEX, DOCPROPERTY, TITLE, MERGEFIELD, NOTEREF, SHAPE, QUOTE. Other field codes will be dealt with according to the <b>Ignore Field Codes</b> parameter setting.</p> </div> <p>For example, where there is a date field that in the original document shows 1 Jan 2012 and in the modified updates to 31 Jan 2012. When this parameter is selected, the Redline will show <span style="color: red;">+31</span> Jan 2012. Where this parameter is not selected, no change will be shown.</p>
<b>Ignore Tables</b>	If selected, any tables in the modified document are ignored.
<b>Display comments in redline</b>	If selected, comments in the original and modified documents are compared.
<b>Detect Changes to Images</b>	If selected, images in the original and modified documents are compared. In order for images to be compared, you must ensure that the <b>Ignore Embedded Objects/Images</b> parameter is NOT selected.
<b>Ignore auto list against manual number list changes</b>	<p>If selected, when an automatically formatted list is being compared against a manual list, any changes in the manual list are ignored.</p> <p>Generally this parameter should NOT be selected. It should only be selected in circumstances when one of the documents being compared contains automatic list numbering and the other document contains manual list numbering.</p>

## Redline Options

The **Redline Options** category includes parameters that enable you to customize how the Redline document is displayed and what information is included with the Redline document.

The Redline Options parameters are described in the following table:

Parameter	Description
<b>General Options</b>	
<b>Include redline statistics</b>	If selected, statistics about the changes between the original and modified documents is displayed in the Redline document. You can select to display these statistics <b>at the start of the document</b> or <b>at the end of the document</b> .
<b>Include Redline Comparison Summary</b>	If selected, a summary of all the changes is displayed at the end of the Redline document. The changes are hyperlinked to take you directly to the change in the Redline document.
<b>Include Redline Option Summary</b>	If selected, a summary of the options selected in the current rendering set is displayed at the end of the Redline document in the statistics report.

Parameter	Description
<b>Display Workshare Compare Footers</b>	If selected, details about the two documents being compared are displayed in the footer of the Redline document.
<b>Black And White Headers</b>	If selected, changes detected in the header are rendered in black and white. The color scheme set up in the rendering set is maintained for changes to all other parts of the document.
<b>Black And White Footers</b>	If selected, changes detected in the footer are rendered in black and white. The color scheme set up in the rendering set is maintained for changes to all other parts of the document.
<b>Show Moved Deletions</b>	If selected, text that was deleted from a section of the document and then subsequently moved to a new location is indicated.
<b>Show Changes to Spaces</b>	If selected, any extra spaces that have been added to or deleted from the modified document are indicated.
<b>Show Paragraph Changes</b>	If selected, paragraph markers ( ¶ ) of any extra paragraphs that have been added to or deleted from the modified document are displayed.
<b>Include file names in Redline statistics</b>	If selected, the names of the compared documents are included in the Redline statistics.
<b>Change Indicator Options</b>	
<b>Show Hidden Text</b>	If selected, hidden text is displayed in the Redline document.
<b>Show Line Numbering</b>	If selected, the line number is displayed to the left of each line in the margin of the Redline document.
<b>Show Change Numbering ToolTips</b>	If selected, tool tips are displayed when you position the cursor over change numbers.
<b>Show change bars</b>	If selected, vertical lines to indicate a change are displayed next to each change in the margin of the Redline document. You can select to display the lines either in the <b>Left</b> or <b>Right</b> margin.
<b>Show change numbers</b>	If selected, the change number is displayed next to each change in the margin of the Redline document. You can select to display the number either in the <b>Left</b> or <b>Right</b> margin.
<b>Readability</b>	See the Readability section below.

**Note:** The change indicator settings do not show if you open the Redline document in Microsoft Word.

## Readability

The **Readability** option enables you to set at what point insertions and deletions should no longer be marked individually but marked as an entire paragraph deleted followed by an entire paragraph inserted. The deleted paragraph is as the paragraph appears in the original document and the inserted paragraph is as the paragraph appears in the modified document.

For example, the following paragraph showing numerous deletions and insertions is quite difficult to read:

~~DeltaView Redline with Table of Contents: (Vendor)When performing a redline where the document contains an~~contents issue: An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is \*.wdf. Workaround: Save the redline~~Word. Workaround: Save the table of contents in as a new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolution~~DOC file and open it in Word before printing.

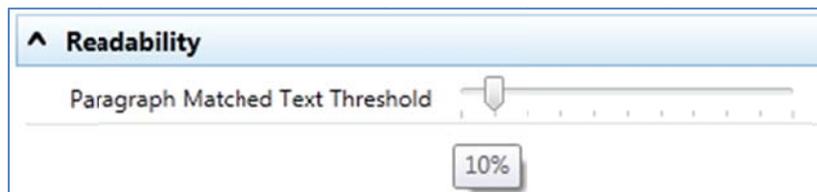
It would be much easier to read this paragraph if it was presented as the entire paragraph deleted followed by a new paragraph inserted, as follows:

~~DeltaView Redline with Table of Contents: (Vendor)When performing a redline where the document contains an automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is \*.wdf. Workaround: Save the redline as a new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolution.~~

DeltaView Table of contents issue: An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated in Word. Workaround: Save the table of contents in as a DOC file and open it in Word before printing.

Obviously, if there were only a few deletions and insertions in a paragraph, then the first example is easy to read.

With the Readability parameter, you can specify at what point Workshare Compare no longer marks deletions and insertions individually but marks the entire paragraph as a deletion followed by the new paragraph as an insertion. You specify this by setting a readability percentage by dragging the **Paragraph Matched Text Threshold** slider to your required setting. The percentage selected is shown in a tool tip above the slider.



The meaning of the setting is as follows:

- With readability set at 10%, Workshare Compare will mark insertions and deletions individually unless 90% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the first example shown previously. Only when more than 90% of the paragraph has changed will Workshare Compare display the paragraph as the second example.
- With readability set at 50%, Workshare Compare will mark insertions and deletions individually unless 50% of the paragraph has changed. In other words, paragraphs will be displayed in the same way as the first example shown previously unless more than 50% of the paragraph has changed.
- With readability set at 90%, Workshare Compare will mark insertions and deletions individually unless 10% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the second example shown previously. Only when less than 10% of the paragraph has changed will Workshare Compare display the paragraph as the first example.

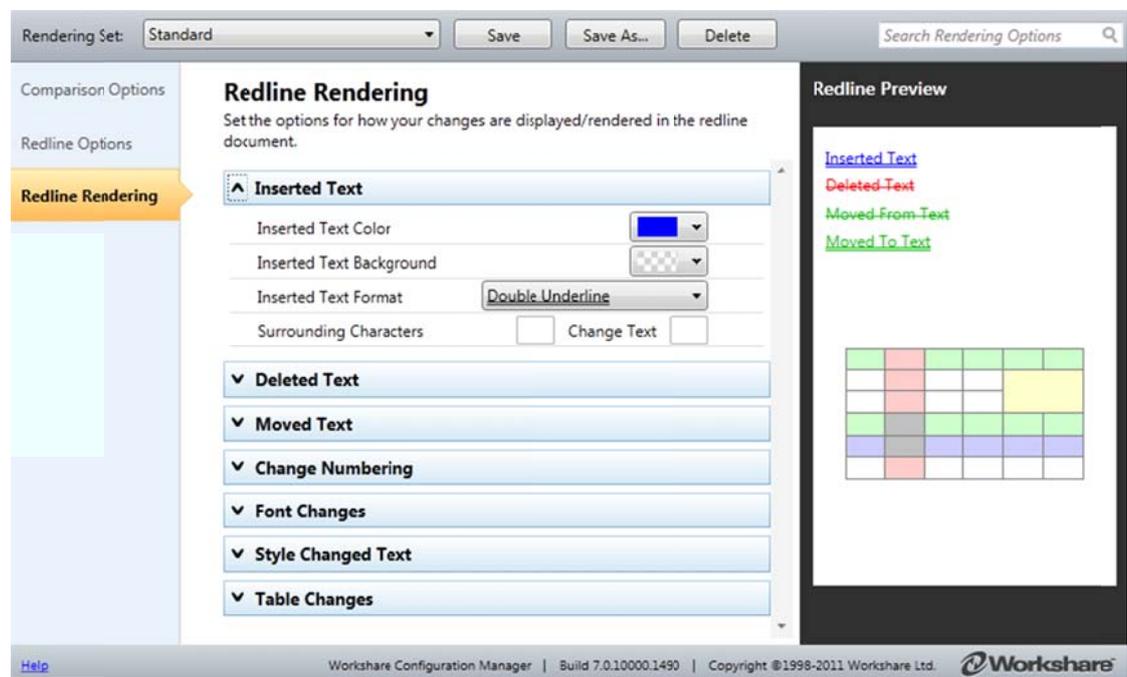
The default setting for readability is 10%.

Workshare Compare looks at each paragraph separately and assesses its readability according to the number of changes in the paragraph.

**Note:** When working with tables, Workshare Compare does not treat the entire table as a paragraph. Each paragraph within each cell is treated separately.

Readability only applies to paragraphs that contain both inserted and deleted text because such paragraphs may be unclear whereas paragraphs with only insertions or deletions do not have such readability problems.

## Redline Rendering



The **Redline Rendering** category includes parameters that enable you to customize how specific types of changes are displayed in the Redline document.

The Redline Options parameters are presented in the following sections:

### Inserted Text Format

The **Inserted Text Format** section includes parameters that enable you to customize how you would like inserted text to appear in the Redline document.

The Inserted Text Format parameters are described in the following table:

Parameter	Description
<b>Inserted Text Color</b>	The color of inserted text.
<b>Inserted Text Background</b>	The color of the background of inserted text.
<b>Inserted Text Format</b>	The format of inserted text. Select from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or <del>Strikethrough</del> .
<b>Surrounding Characters</b>	A keyboard character to go before and after inserted text.

### Deleted Text Format

The **Deleted Text Format** section includes parameters that enable you to customize how you would like deleted text to appear in the Redline document.

The Deleted Text Format parameters are described in the following table:

Parameter	Description
<b>Deleted Text Color</b>	The color of deleted text.
<b>Deleted Text Background</b>	The color of the background of deleted text.
<b>Deleted Text Format</b>	The format of deleted text. Select from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or <del>Strikethrough</del> .
<b>Surrounding Characters</b>	A keyboard character to go before and after deleted text.
<b>Deleted Text Replacement Character</b>	The character used to replace deleted text. If the <b>Replace Deletes with Single Character</b> checkbox is selected, the deleted text is replaced with a single instance of the character specified. If the <b>Replace Deletes with Single Character</b> checkbox is not selected, each character in the deleted text is replaced with the character specified. For example, if the word <b>compare</b> is deleted and the character specified is <b>X</b> , the word appears as <b>XXXXXX</b> .
<b>Replace Deleted Text with a Single Character</b>	If selected, deleted text is replaced with a single character. If you select this checkbox, enter the required character in the <b>Replacement Character</b> field. For example, if the word <b>compare</b> is deleted and the character specified is <b>X</b> , the word appears as <b>X</b> .
<b>Include summary of deletions</b>	If selected, a summary of deletions is included with the Redline document.

## Moved Text

The **Moved Text** section includes parameters that enable you to customize how you would like moved text to appear in the Redline document.

^ **Moved Text**

Show Movements

---

Moved Text Color

Moved Text Background

Moved Source Text Format Strikethrough

Moved Destination Text Format Double Underline

Move Source Surrounding Characters  Change Text

Move Destination Surrounding Characters  Change Text

The Moved Text parameters are described in the following table:

Parameter	Description
<b>Show Movements</b>	If selected, moved text is shown in the Redline document. If you leave this checkbox unchecked, then any text that has been moved is displayed the same as inserted and deleted text.
<b>Moved Text Color</b>	The color of moved text.
<b>Moved Text Background</b>	The color of the background of moved text.
<b>Moved Source Text Format</b>	The format of the source moved text. Select the format of the text in its original position from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or <del>Strikethrough</del> .
<b>Moved Destination Text Format</b>	The format of the destination moved text. Select the format of the text in its new position from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or <del>Strikethrough</del> .
<b>Move Source Surrounding Characters</b>	A keyboard character to go before and after source moved text. Specify the characters to surround the text in its original position.
<b>Move Destination Surrounding Characters</b>	A keyboard character to go before and after destination moved text. Specify the characters to surround the text in its new position.

## Change Numbering

The **Change Numbering** section includes parameters that enable you to select whether change numbers are shown in the Redline document and, if so, how they appear.

The Change Numbering parameters are described in the following table:

Parameter	Description
<b>Show Change Numbering</b>	If selected, the number of the change is displayed next to each change in the body of the Redline document (as superscript).
<b>Show Change Numbering before Change</b>	If selected, the change number is displayed before the change. If not selected, the change number is displayed after the change. It is recommended to position the change number before the change as footnotes often appear after text. This reduces confusion.
<b>Change Number Text Color</b>	The color of change numbers.
<b>Change Number Text Format</b>	The format of change numbers. Select from a range of formats, including <b>Superscript</b> or <b>Bold</b> .

## Font Changes

The **Font Changes** section includes parameters that enable you to customize how you would like any font changes to appear in the Redline document.

The Font Changes parameters are described in the following table:

Parameter	Description
<b>Show Font Changes</b>	If selected, font changes are shown in the Redline document.
<b>Font Change Text Color</b>	The color of font changes.
<b>Font Change Text Background</b>	The color of the background of font changes.
<b>Surrounding Characters</b>	A keyboard character to go before and after font changes.

**Note:** Insertions and deletions override any font changes. For example, if the modified document has new inserted text in a different font, it appears as inserted text and not as font change text.

## Style Changed Text

The **Style Changed Text** section includes parameters that enable you to customize how you would like any style changes to appear in the Redline document.

The Style Changed Text parameters are described in the following table:

Parameter	Description
<b>Show Paragraph Style Changes</b>	If selected, paragraph style changes are shown in the Redline document. Paragraph style changes are indicated in words, for example, <b>normal to heading two</b> .
<b>Style Changed Label Color</b>	The color of text in paragraphs where the paragraph style has changed.
<b>Show Character Style Changes</b>	If selected, character style changes are shown in the Redline document.
<b>Style Changed Color</b>	The color of character style changes.
<b>Style Changed Background</b>	The color of the background of character style changes.
<b>Style Changed Format</b>	The format of character style changes. Select from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or <del>Strikethrough</del> .
<b>Surrounding Characters</b>	A keyboard character to go before and after style changed text.

*Note: Changes to heading styles are also shown in the statistics report at the end of the Redline document.*

## Table Changes

The **Table Changes** section includes parameters that enable you to customize how you would like any format changes in tables to appear in the Redline document.

^
**Table Changes**

Table change options Changes with surrounding char: ▾

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Table Cell Inserted Color ▾

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Table Cell Deleted Color ▾

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Table Cell Moved Color ▾

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Table Cell Merged Color ▾

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Table Cell Padding Color ▾

The Table Changes parameters are described in the following table:

Parameter	Description
<b>Table Change Options</b>	The way changes in tables are indicated. You can select from the following: <b>Changes with surrounding characters</b> , <b>Changes without surrounding characters</b> , <b>Whole original and modified tables</b> , <b>Whole modified table only</b> or <b>Whole modified table only (unmarked)</b> . Selecting <b>Whole modified table only (unmarked)</b> , the modified table is shown in the Redline document as a new table with no changes marked. Selecting <b>Whole modified table only</b> , the modified table is also shown in the Redline document as a new table but it is shown as an insertion.
<b>Table Cell Inserted Color</b>	The color of inserted cells.
<b>Table Cell Deleted Color</b>	The color of deleted cells.
<b>Table Cell Moved Color</b>	The color of moved cells.
<b>Table Cell Merged Color</b>	The color of merged cells.
<b>Table Cell Padding Color</b>	The color of padded cells.

### What are Padded Cells?

Padded cells occur when an insert and delete have occurred within a table, a cell becomes both an insert **and** a delete; therefore it creates a padded cell.

#### Original Table

Cell 1	Cell 2	Cell 3
Cell 4	Cell 5	Cell 6

#### Modified Table

Cell 1	Cell 3
Cell A	Cell B
Cell 4	Cell 6

#### Rendered Table

Cell 1	Cell-2	Cell 3
<u>Cell A</u>	PADED CELL	<u>Cell B</u>
Cell 4	Cell-5	Cell 6