

Workshare Compare

User Guide

Company Information

Workshare Compare User Guide

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

Workshare Inc. (USA)
208 Utah Street, Suite 350
San Francisco
CA 94103
USA

Workshare Website: www.workshare.com

Trademarks

Trademarked names appear throughout this guide as well as on other parts of the Workshare Compare CD. Instead of listing these here or inserting numerous trademark symbols, Workshare wishes to state categorically that no infringement of intellectual or other copyright is intended and that trademarks are used only for editorial purposes.

Disclaimers

The authors/publishers of the Workshare Compare User Guide and associated Help material have used their best efforts to ensure accuracy and effectiveness. Due to the continuing nature of software development, it may be necessary to distribute updated Help from time to time. The authors would like to assure users of their continued best efforts in supplying the most effective Help material possible.

The authors/publishers, however, make no warranty of any kind, expressed or implied, with regard to Workshare programs or Help material associated with them, including the Workshare Compare User Guide. The authors/publishers shall not be liable in the event of incidental or consequential damages in connection with, or arising out of, the programs or associated Help instructions.

Copyright

© 2010. Workshare Ltd. All rights reserved. Workshare Professional and Workshare DeltaView are registered trademarks of Workshare Ltd. Workshare Compare, Workshare Protect, Workshare 3, Workshare DeltaServer, SafetyGain, and the Workshare logo are trademarks of Workshare Ltd. All other trademarks are those of their respective holders.

Table of Contents

Chapter 1. Introducing Workshare Compare	6
What is Workshare Compare?	6
Features and Benefits	7
Terms and Concepts	8
Chapter 2. Getting Started.....	9
Launching Workshare Compare.....	9
Workshare Panel	10
Workshare Menu	11
Workshare Tab	11
Enabling Workshare Compare Functionality	12
Chapter 3. Comparing Documents from within Microsoft Word	13
Overview	13
PDF Comparison	13
Performing a Comparison	14
Working with the Redline Document	17
Navigating Between Changes	17
Edit the Rendering Set.....	17
Swapping the Source Documents	17
Printing the Redline Document	18
Saving the Redline Document.....	19
Sending Compared Documents by Email.....	23
Chapter 4. Comparing Documents Using Workshare Compare	25
Overview	25
PDF Comparison.....	26
Performing Comparisons	26
Launching Workshare Compare from Microsoft Word	27
Launching Workshare Compare from your Desktop	29
Auto Retry Mode.....	31
Failsafe Mode.....	33

Manually Invoke Failsafe Mode	33
Comparing an Attachment.....	34
Workshare Compare Main Window	36
Quick Access Toolbar	37
Logo Menu	37
Redline Tabs	38
Redline Document	38
Redline Summary	39
Redline Document Right-Click Menu	39
Home Tab	40
Review Tab.....	41
View Tab	42
Change Summary Window	43
Source Documents Window.....	44
Working with Redline Documents	45
Navigating Changes	45
Navigating Between Changes	45
Navigating to a Specific Change Number	45
Searching for Changes	46
Swapping Source Documents	47
Editing Redline Documents.....	47
Changing How the Comparison is Performed	48
Acting on Changes	49
Sending Comparisons by Email	50
Printing Redline Documents	52
Saving Redline Documents.....	52
Opening Saved Workshare Compare DeltaFiles	56
Configuring User Preferences	57
Chapter 5. Configuring Rendering Sets.....	59
Introducing Rendering Sets.....	59
Where are Rendering Sets Stored?.....	59

Applying Rendering Sets60

Customizing Rendering Sets 61

 Deleting Rendering Sets 62

Rendering Set Parameters 62

 Comparison Options 63

 Redline Options 65

 Readability Options..... 67

 Inserted Text Format 69

 Deleted Text Format 70

 Moved Text Format 71

 Font Change Format 72

 Style Change Format 73

 Table Cell Format..... 74

 What are Padded Cells? 75

 Change Numbering Format..... 75

Appendix A. Offline Mode 77

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 7, provides an overview of the key features of Workshare Compare.
- **Terms and Concepts**, page 8, introduces the common terms and concepts used in Workshare Compare and in this guide.

What is Workshare Compare?

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, Workshare Compare provides access to version information stored in the DMS. 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.

Features and Benefits

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.

- **Comparison Speed**

Run a document comparison that is 8x-10x faster than the original DeltaView comparison engine.

- **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 document management system. For example, Workshare Compare provides a list of the DMS versions of a document, enabling the comparison of document versions.

Terms and Concepts

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

Term	Definition
Document Management System (DMS)	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.
Modified Document	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.
Original Document	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.
Redline Document	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.
Rendering Set	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 red with strikethrough . 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 10, describes the Workshare Panel and the options available from it.
- **Workshare Menu**, page 11, describes the options available in the Workshare menu added in Microsoft 2003/XP.
- **Workshare Tab**, page 11, describes the options available in the Workshare tab added in Microsoft Office 2007.
- **Enabling Workshare Compare Functionality**, page 12, describes how to ensure that Workshare Compare functionality is fully enabled.

Launching Workshare Compare


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 *Workshare Compare Main Window*, page 36.

Within Microsoft Word, the Workshare Compare functionality can be accessed from the Workshare Panel, menu or tab. After you have installed Workshare Compare, you see the following:

- The Workshare Panel is displayed down the left side of the window. Refer to *Workshare Panel*, page 10, for more information.
- The *Workshare* menu is added to the menu bar (MS Word 2003/XP). Refer to *Workshare Menu*, page 11, for more information
- The *Workshare* tab is added to the Ribbon (MS Word 2007). Refer to *Workshare Tab*, page 11, for more information
- The **Toggle Workshare panel** button  is added to the Standard toolbar (MS Word 2003/XP).

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 Office 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*, page 34.

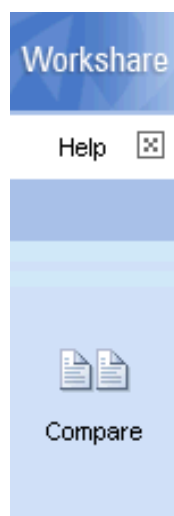
Workshare Panel

The Workshare Panel, displayed by default down the left side of the Microsoft Word window, provides access to Workshare Compare functionality.

You can display/hide the Workshare Panel in any of the following ways:

- MS Office 2003/XP: Select **Show Workshare Panel** from the *Workshare* menu or click the **Toggle Workshare panel** button  in the Standard Microsoft Word toolbar.
- MS Office 2007: Click **Toggle Panel** in the *Workshare* tab, **Options** group.


The Workshare Panel is your guide, prompting you through each step of the comparison process.



The Workshare Panel Home page includes the following button:

Compare: Enables you to compare a document with a previous version of the same document or with another document.

***Tip!** In MS Office 2007, the Workshare Panel can float over other windows. Click and drag the title bar of the Panel to move it to a different location.*

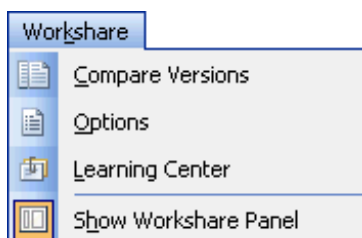
There is a Help [Help](#) link displayed at the top of every page in the Workshare Panel that provides access to online help as well as a close  button that enables you to close/hide the Workshare Panel. Additionally, at the top of all pages of the Workshare Panel except the Home page, the following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

- | | |
|----------------------|---|
| Home | Return to the Home page of the Workshare Panel. |
| Back | Return to the previously displayed page of the Workshare Panel. |

Workshare Menu

The *Workshare* menu is available in Microsoft Word 2003/XP. In Microsoft Office 2007, functionality is available in the *Workshare* tab. Refer to *Workshare Tab*, page 11.





Whenever you open a document in Microsoft Word, the *Workshare* menu is included in the menu bar.



It is also possible to replace the Workshare menu with a toolbar. To do so, select the **Replace the Workshare menu with the Workshare toolbar** parameter (**Workshare UI Configuration** category) in the Workshare Configuration Manager and restart Microsoft Word.

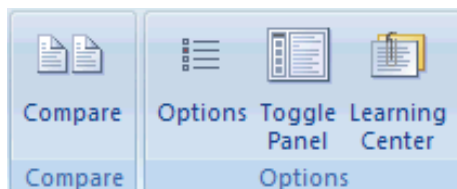


The *Workshare* menu includes the following options:

Menu Item	Toolbar Button	Description
Compare Versions		Enables you to compare a document with a previous version of the same document or with another document..
Options		Enables you to configure system parameters in the Workshare Configuration Manager. Refer to the <i>Workshare Compare Installation Guide</i> for further information.
Learning Center		Provides access to the Learning Center on the Workshare website where you can access useful information to help you learn about Workshare Compare. The Learning Center is also available from the Options page of the Workshare Panel. (Select Options from the <i>Workshare</i> menu to display the Options page in the Workshare Panel.)
Show Workshare Panel		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 <i>Workshare Panel</i> , page 10.

Workshare Tab

The *Workshare* tab is available in Microsoft Word 2007.

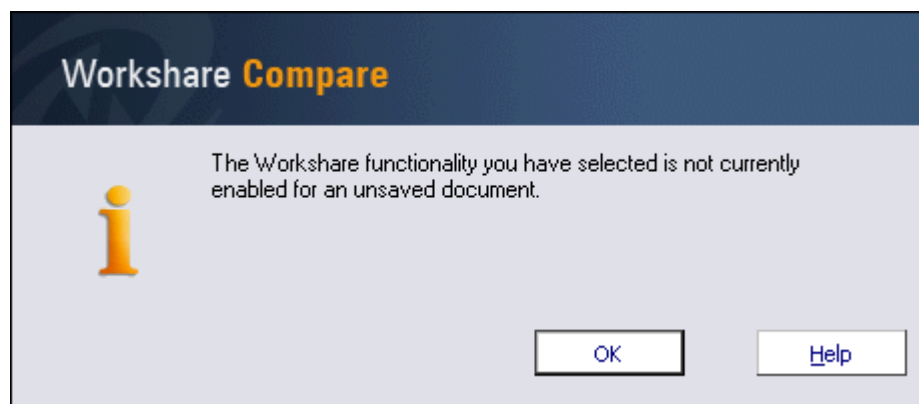


The *Workshare* tab includes the following options:

Group	Item	Description
Compare	Compare	Enables you to compare a document with a previous version of the same document or with another document.
Options	Options	Enables you to configure system parameters in the Workshare Configuration Manager. Refer to the <i>Workshare Compare Installation Guide</i> for further information.
	Toggle Panel	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 <i>Workshare Panel</i> , page 10.
	Learning Center	Provides access to the Learning Center on the Workshare website where you can access useful information to help you learn about Workshare Compare. The Learning Center is also available from the Options page of the Workshare Panel. (Click Options to display the Options page in the Workshare Panel.)

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. For example, if you open a document directly from an email attachment, it is only a temporary document and so Workshare Compare functionality is not fully enabled. If you select **Compare**, the following message is displayed:



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 13, 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 17, describes the tools available to you when working with the compared (Redline) document after a comparison

Overview

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. You can compare a Microsoft Word (DOC) file against another DOC file or against a PDF file. 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 PDFs that originate from scanned documents. Workshare Compare compares regular PDFs by converting them to RTF before performing a comparison.

Workshare Compare supports the comparison of PDFs generated from files that have been scanned where OCR (Optical Character Recognition) has already been used to translate images of typewritten text into editable text.

Note: *If you compare scanned PDF files without applying OCR, it may result in a blank Redline document. You are advised to only compare scanned PDF files after OCR has been applied.*

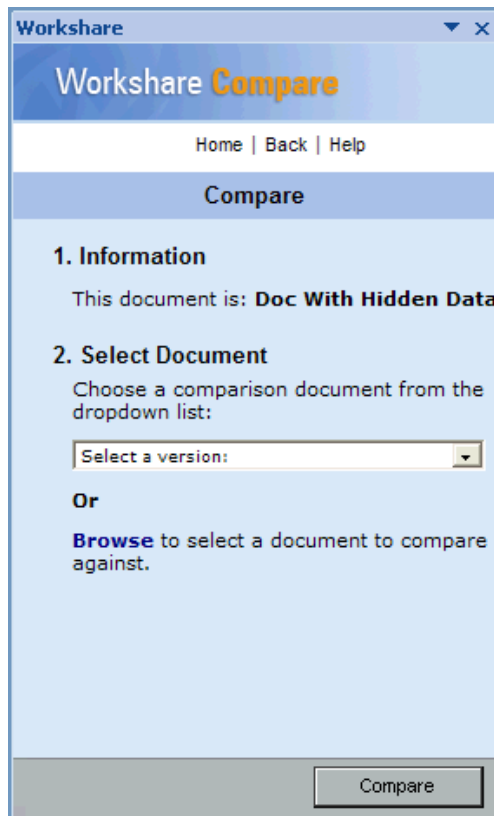
Performing a Comparison

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. From the *Workshare* menu, select **Compare Versions** (MS Office 2003/XP) or click **Compare** in the *Workshare* tab, **Compare** group (MS Office 2007) 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.

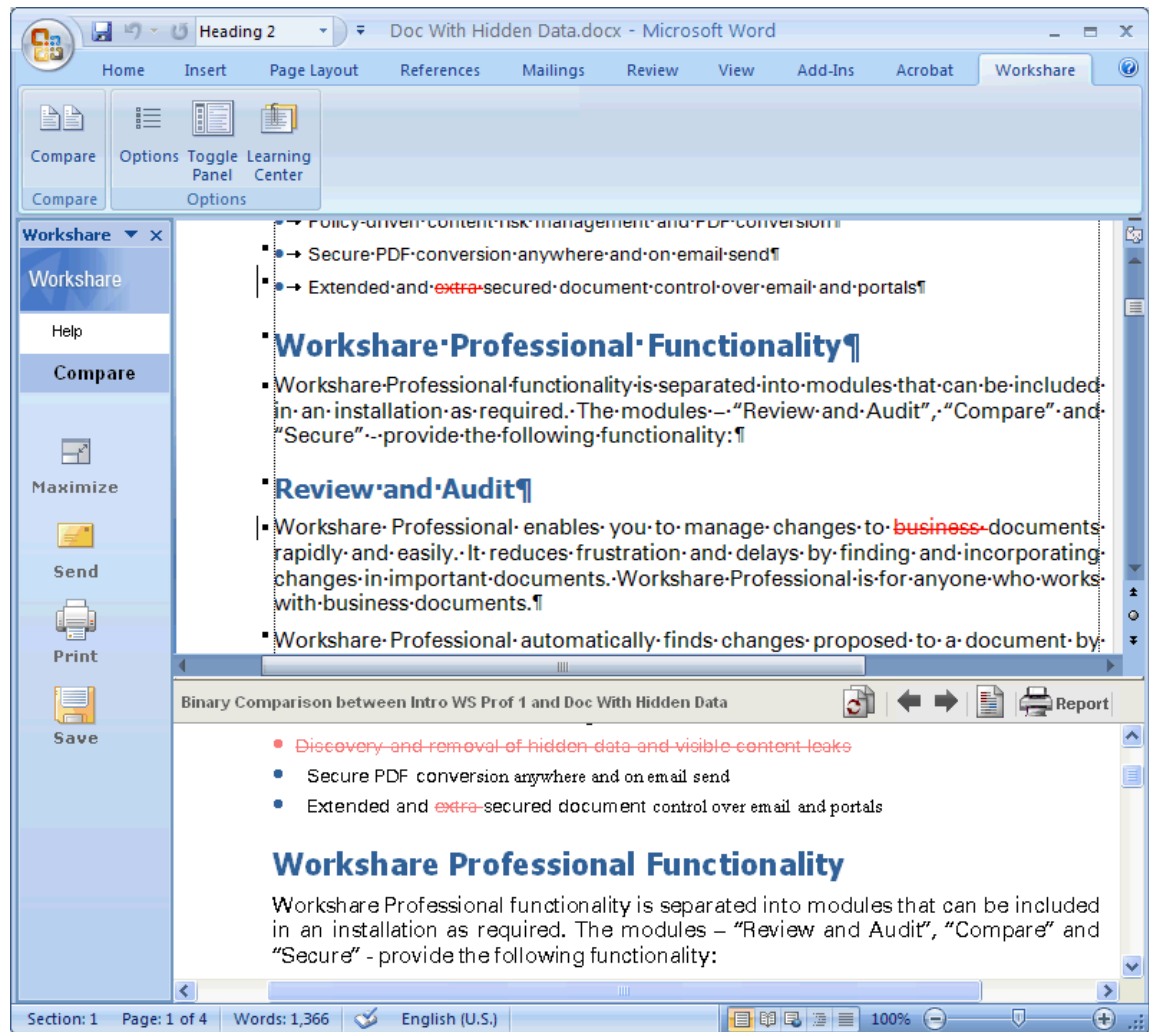
2. Select the document against which you want to compare the current document in one of the following ways:
 - Select a version of the document from the dropdown list. This option is only available when working with a document with versions.
 - Select a draft of the document that was previously sent for review from the dropdown list. This option is only available when working with documents that have no versions and that have previously been sent for review.
 - Click **Browse** and select a document (DOC or PDF file) from your DMS, SharePoint or locally.

The Compare page is displayed as follows:

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 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 *Chapter 5: Configuring Rendering Sets*.
4. Ensure the **Open in Compare** checkbox is NOT selected.
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.

Selecting a change in the Redline document scrolls to the change and highlights it in 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 on page 13.


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

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 *Chapter 5: Configuring 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.

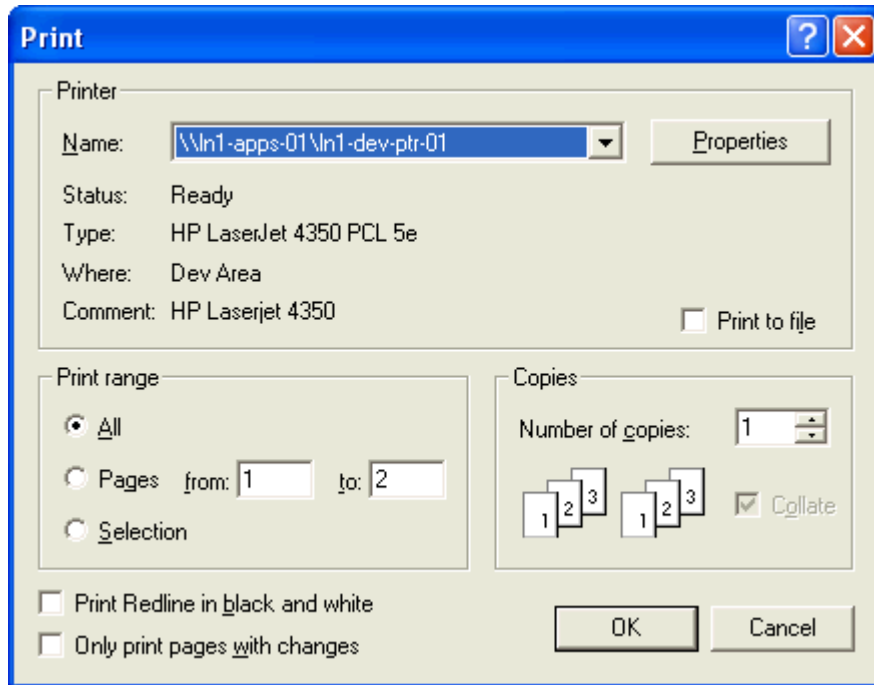
Click  in the toolbar above the Redline document to swap the original and modified documents so that Document B is now the original document and Document A is the document selected to compare Document B against. Workshare Compare automatically re-runs the comparison, comparing Document B to Document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

Printing the Redline Document

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.



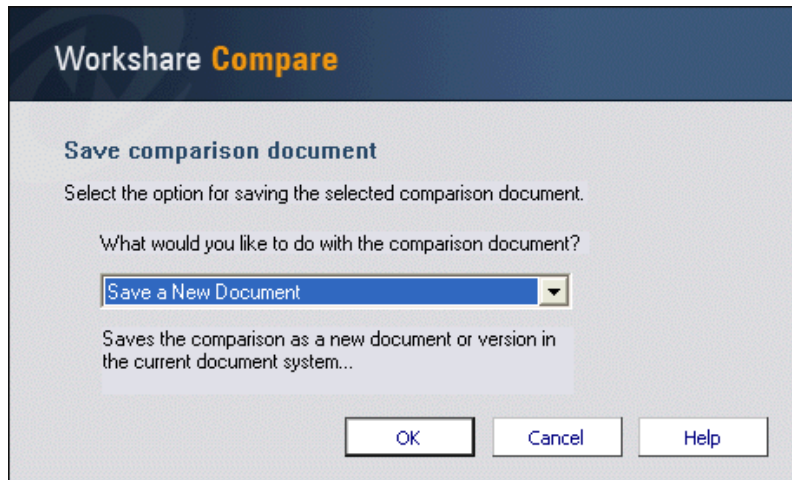
2. Select from the standard print options in the usual way.
3. If you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as colored text may not appear clearly when printing in black and white.
4. If you only want to print pages of the Redline document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

Saving the Redline Document

You can save the Redline document as an RTF or Microsoft Word file to your DMS, SharePoint or locally. The following procedure describes how to save to Interwoven 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 or SharePoint, the LocalStore Save As dialog is displayed.

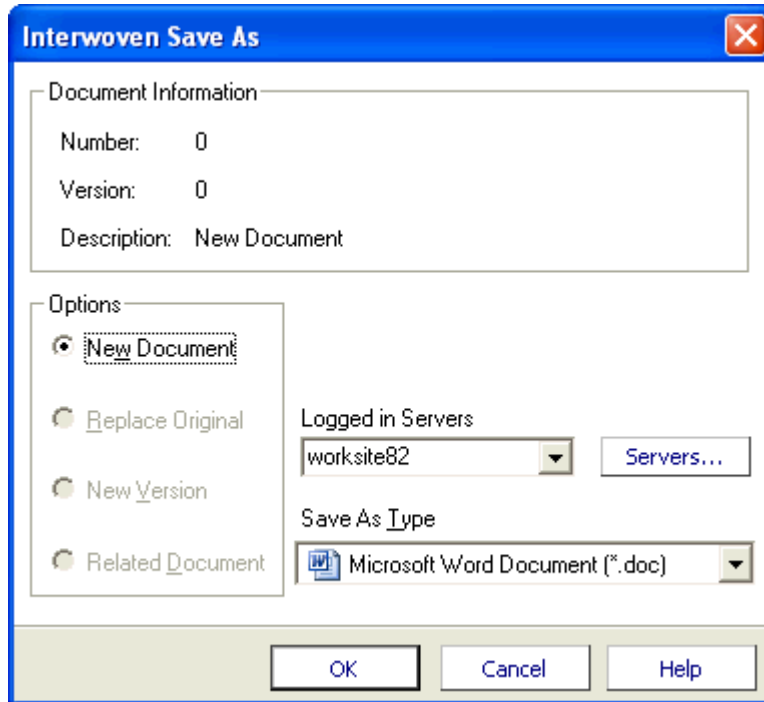
Tip! If you are working with a DMS or SharePoint but both documents compared are local documents, then you can press the **Shift** key while clicking **Save** and the LocalStore Save As dialog is displayed.

2. 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 Interwoven or DOCS Open integration and the original document is from Interwoven or DOCS Open)
 - **Attach/Relate to Modified Document** (Only available when using the Interwoven or DOCS Open integration and the modified document is from Interwoven 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.

3. Click **OK**. The *Interwoven 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.

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

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

- Related Document** (Interwoven 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. (Interwoven 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.

- Click **OK**. In Interwoven 8, the following dialog is displayed:

New Profile

Please choose the location and document properties

Description
WS_BinaryComparison_#426v1<inter82> - xxx:#426v2<inter

Location
documents <documents>

Author
QAADMIN2 <qadmin2>

Class
[Empty]

Custom1
[Empty]

Custom2
[Empty]

Comments
[Empty]

Other Properties

Type
WORD

Custom3
[Empty]

Custom29
[Empty]

Custom30
[Empty]

Custom4
[Empty]

Operator
QAADMIN2 <qadmin2>

Security

Shared as: Public

WorkSite

- 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 Email Comparison page is displayed as follows:

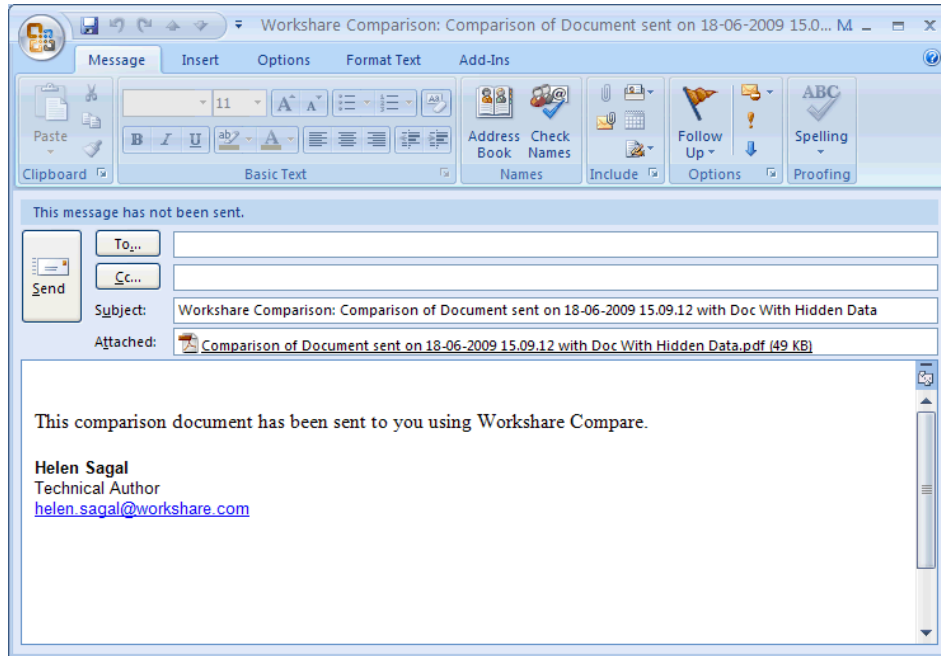
The screenshot shows a dialog box titled "Workshare Compare" with a blue header and a white navigation bar containing "Home | Back | Help". The main content area is light blue and contains two sections: "1. Select File Type" with radio buttons for "Word Document" (selected) and "PDF", and "2. Comparison Document File Name" with a text input field labeled "File Name:". A "Create Email" button is located at the bottom right of the dialog.

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:** The comparison will be sent as a PDF file.

Note: If you do not have the Workshare Compare PDF Publisher printer installed, Workshare Compare cannot convert the document to PDF. The document will be sent in Microsoft Word Document format. Refer to your system administrator.

3. 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]**.

4. 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.)



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

Chapter 4. Comparing Documents Using Workshare Compare

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

- **Overview**, below, introduces the Workshare Compare application.
- **Performing Comparisons**, page 26, describes how to compare a document against single or multiple documents using Workshare Compare.
- **Workshare Compare Main Window**, page 9, describes the Workshare Compare environment and provides an overview of the functionality available.
- **Working with Redline Documents**, page 45, describes the tools available to you when working with the compared (Redline) document after a comparison.
- **Configuring User Preferences**, page 57, describes how to configure user preferences, which define certain aspects of the way Workshare Compare works.

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

Overview

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 original document and the comparison document. You can compare an original document against several different modified documents and see the Redline document for each comparison in a different tab.

You can compare both Microsoft Word (DOC) files and PDF files.

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:** Workshare Compare performs a binary comparison. A binary comparison is faster than a standard comparison because it is comparison at the binary level. This option is only available when comparing a .DOC file against another .DOC file. So you cannot do a Fast comparison when comparing DOC against PDF or DOCX against DOC.
- **Text Only:** Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

- **Image Based PDF:** Workshare Compare passes the PDF to an ABBYY Recognition Server for automated OCR processing and receives back an RTF with which to perform a comparison. This option is only available when comparing a PDF and when you have an ABBYY Recognition Server configured. (Refer to *Appendix B: Configuring Workshare Compare* of the Workshare Compare Installation Guide for further information.)

PDF Comparison

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

PDFs that originate from scanned documents may include:

- PDFs 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 PDFs.
- PDFs that have been created directly from the scanning: Where OCR has not been used and PDFs contain pure images of text. Workshare Compare can integrate with an ABBYY Recognition Server to apply OCR to the PDFs before performing comparisons. Such PDFs can only be compared when you have an ABBYY Recognition Server configured.

Note: *If you compare scanned PDF files without applying OCR, it may result in a blank Redline document. You are advised to only compare scanned PDF files after OCR has been applied.*

Performing Comparisons

You can launch Workshare Compare both from within Microsoft Word and from your desktop. You can also use Workshare Compare to compare an email attachment with another document on your local file system, SharePoint or DMS.

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. You can compare a Microsoft Word (DOC) file against another DOC file or against a PDF file.

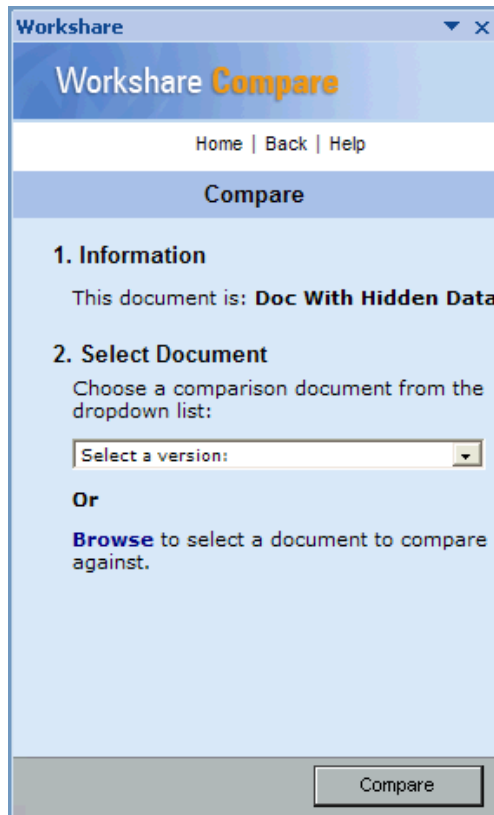
Note: *You cannot compare secure PDFs, meaning PDF files with security settings configured.*

Launching Workshare Compare from Microsoft Word

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

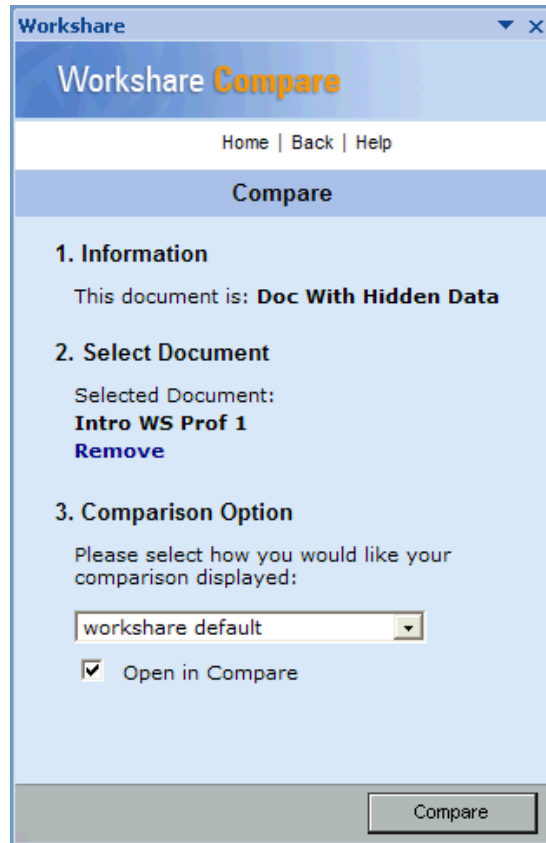
To compare documents:

1. From the *Workshare* menu, select **Compare Versions** (MS Office 2003/XP) or click **Compare** in the *Workshare* tab, **Compare** group (MS Office 2007) 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 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 (DOC or PDF file) from your DMS, SharePoint or locally.

The Compare page is displayed as follows:



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 *Chapter 5: Configuring Rendering Sets*.
4. Select the **Open in Compare** checkbox. Deselecting this checkbox will compare your document from within Microsoft Word. Refer to *Chapter 6: 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*, page 9.

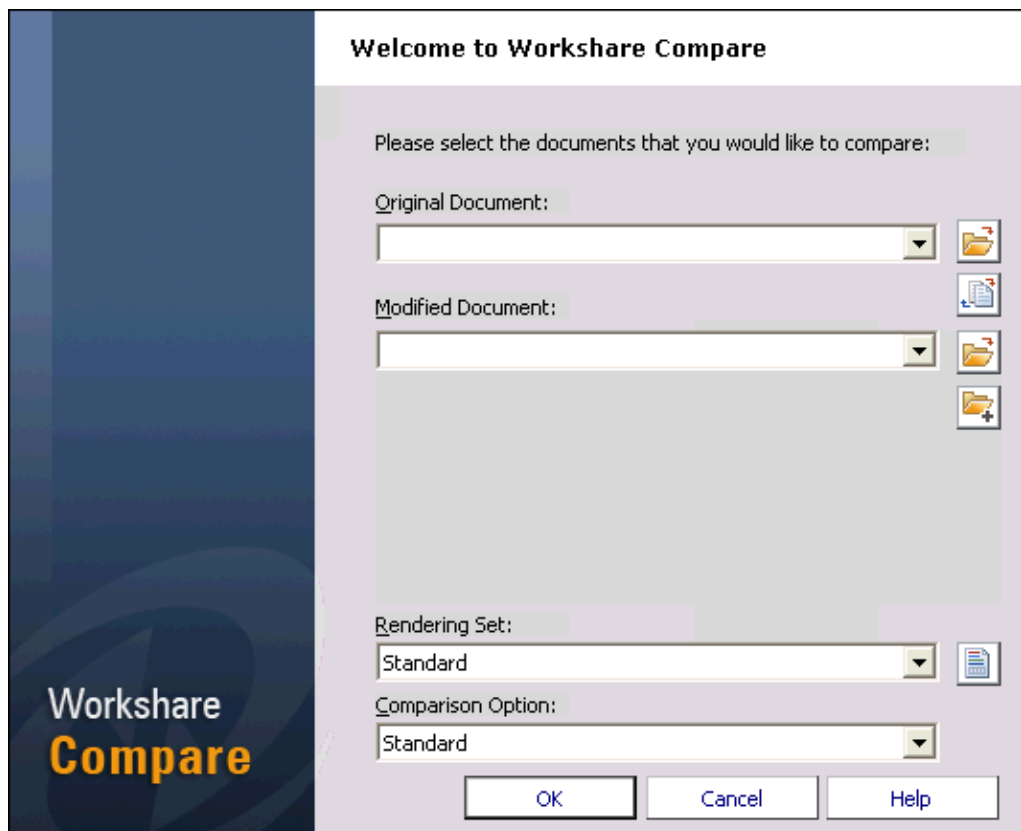
Launching Workshare Compare from your Desktop



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.


To compare documents:


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


Tip! You can also right-click a document you want to compare in Windows Explorer or in your DMS and select **Compare with Workshare**.

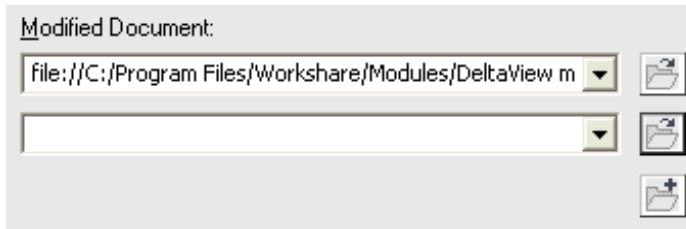



2. Select the original document (DOC or PDF file) you want to compare by clicking the **Open**  button to the right of the **Original Document** field.
3. Navigate to the document location in your local file system, SharePoint or DMS and click **Open**. The selected document is displayed in the **Original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

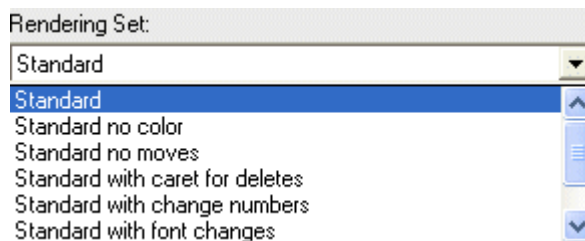
Tip! If you want to compare a recently used file, click the dropdown  in the **Original Document** and **Modified Document** fields and select the documents you want to compare. These lists contain the last 10 documents you have used.


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.

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

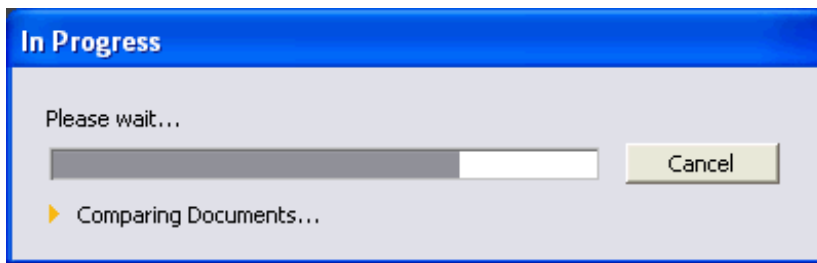


- Select the document you want to compare with the original document by clicking the **Open**  button to the right of the second **Modified Document** field.
- Navigate to the document location in your local file system, SharePoint or DMS and click **Open**. The selected document is displayed in the second **Modified Document** field.
- Repeat steps 6-8 to add further documents as required.
- 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 *Chapter 5: Configuring Rendering Sets*).



Note: Clicking  to the right of the **Rendering Set** field displays the Rendering Set Manager where you can create, modify and delete rendering sets. For a full description refer to *Chapter 5: Configuring 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:** (Only available when comparing a .DOC file against another .DOC file.) Workshare Compare performs a binary comparison. A binary comparison is faster than a standard comparison because it is comparison at the binary level.
 - **Text Only:** Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.
 - **Image Based PDF:** (Only available when comparing a PDF and when you have an ABBYY Recognition Server configured.) Workshare Compare passes the PDF to an ABBYY Recognition Server for automated OCR processing and receives back an RTF with which to perform a comparison.
12. Click **OK**. The comparison process is launched and a Progress dialog is displayed.



The Progress dialog indicates the progress of the comparison.

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*, page 9.

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:

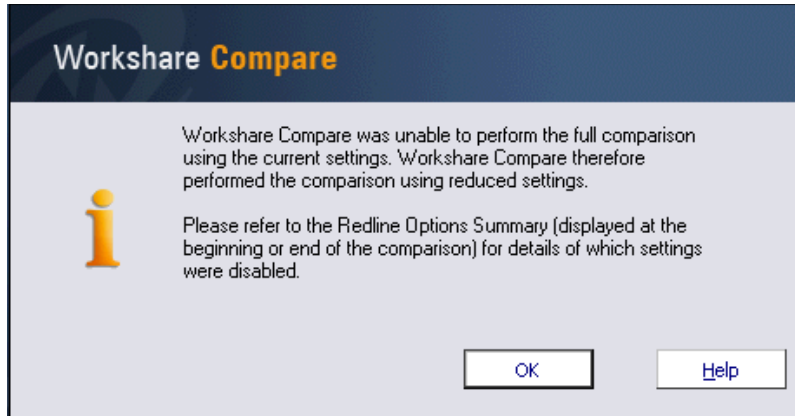
- If enabled, auto retry mode is invoked. See *Auto Retry Mode*, below.
- If auto retry mode is not enabled (or if Workshare Compare cannot complete the comparison in auto retry mode) failsafe mode is invoked. See *Failsafe Mode*, page 33.

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 page of the Rendering Set Manager. Refer to Chapter 5: Configuring Rendering Sets.

Once the comparison is successful, the following message is displayed:



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 page of the Rendering Set Manager.

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

Redline Options Summary	
Option:	Status:
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

Redline Options Summary	
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** page of the **Rendering Set Manager**, when **Workshare Compare** performs an auto retry, the **Redline Options Summary** is always displayed after the comparison.

The status indications are as follows:

- ON** This setting is selected and was applied during the comparison.
- OFF** This setting is not selected and was not applied during the comparison.
- SET ON** This setting was not selected but was enabled by **Workshare Compare** and applied during the comparison.
- SET OFF** This setting was selected but was disabled by **Workshare Compare** and not applied during the comparison.

Note: *Workshare is continually developing and improving its software. To this end, if you are comparing documents and auto retry mode is invoked, Workshare is interested to analyze the documents concerned. Please forward the documents to Workshare Technical Support.*

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.

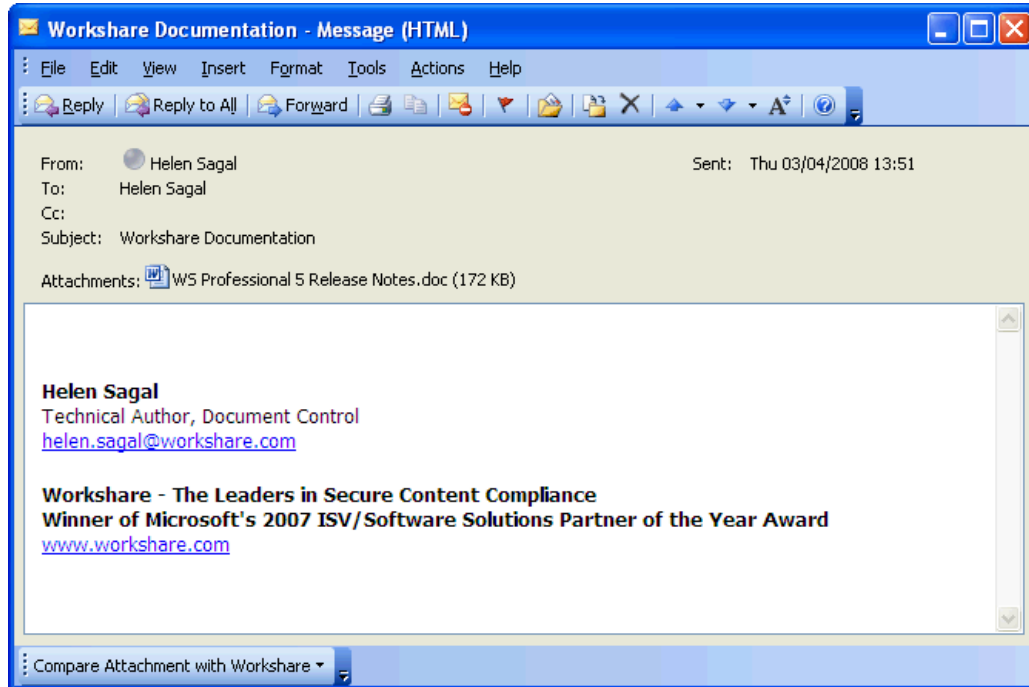
Before running the comparison, select **Text Only** from the **Comparison Option** dropdown list in the **Document Selection** dialog and then click **OK** to run the compare.

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 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 in MS Office 2003/XP:

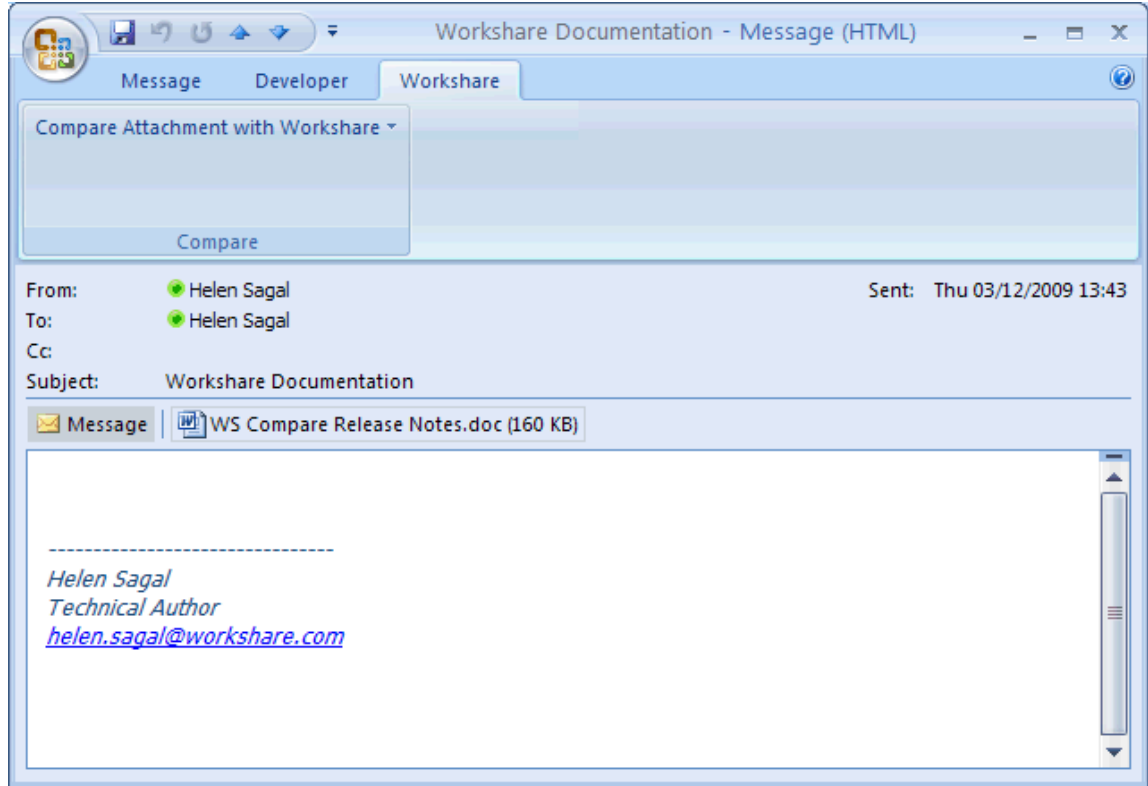
Click the **Compare Attachment with Workshare** button that appears at the bottom of the email and select the attachment you want to compare.



The *Document Selection* dialog is displayed. Select the files to compare as described in *Launching Workshare Compare from your Desktop*, page 29.

To compare an attachment in MS Office 2007:

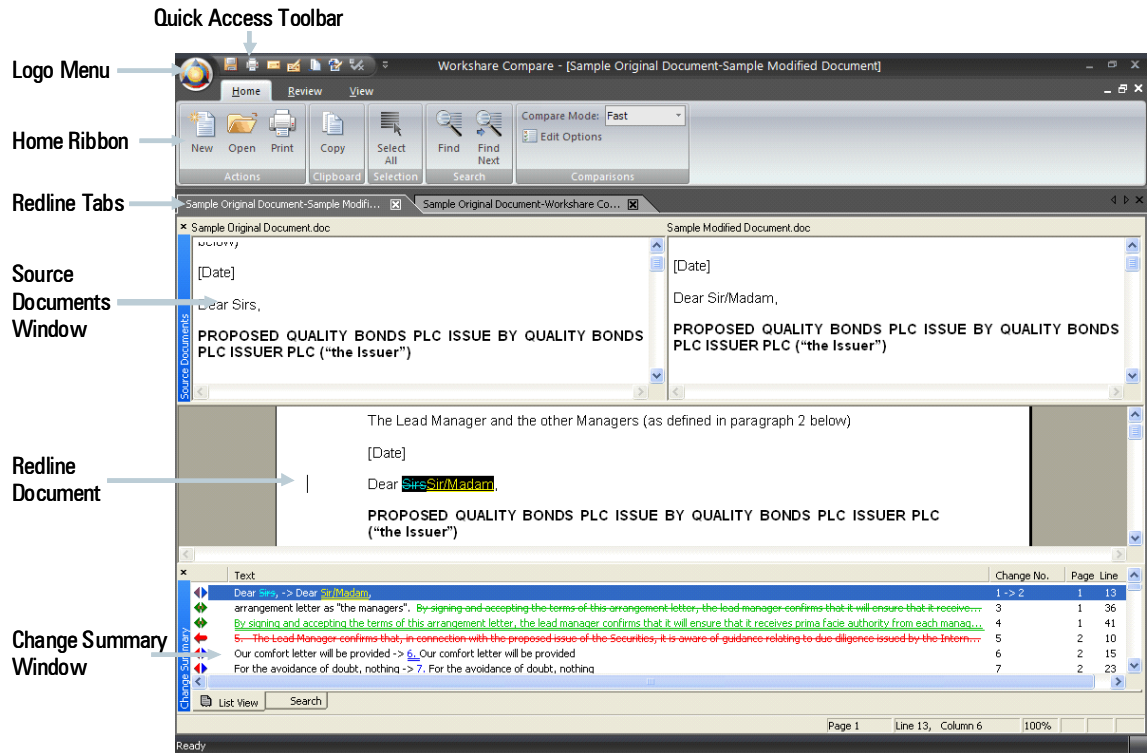
Click the **Compare Attachment with Workshare** dropdown list that appears in the **Workshare** tab and select the attachment you want to compare.



The *Document Selection* dialog is displayed. Select the files to compare as described in *Launching Workshare Compare from your Desktop*, page 29.

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 as well as a summary of the changes between the two source documents.

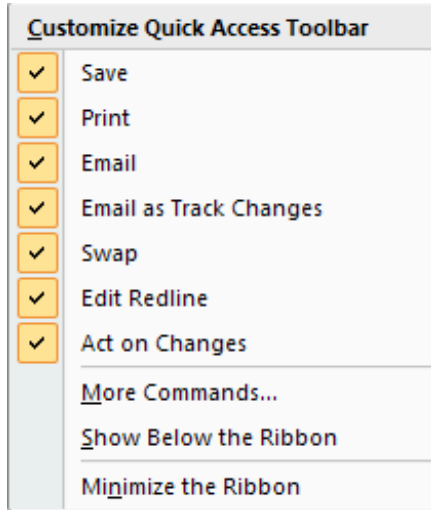


The Ribbon changes according to the selected tab. In the above example, the Home tab is selected. When you select to run multiple comparisons, each resulting Redline document is displayed in an individual tab. The different areas of the Workshare Compare work area are described in the following sections.

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.

Quick Access Toolbar

The Quick Access Toolbar provides one-click access to functionality available in the Home, Review and View Ribbons. By default, the Save, Print, Email, Email as Track Changes, Swap, Edit Redline and Act on Changes buttons are available. By clicking the arrow to the right of the Quick Access Toolbar, you can customize the Quick Access Toolbar as follows:



Select/deselect the **Save, Print, Email, Email as Track Changes, Swap, Edit Redline** or **Act on Changes** options to display/hide these options in the Quick Access Toolbar.

Select **More Commands** to add additional buttons 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
New	Opens the <i>Document Selection</i> dialog enabling you to perform a new document comparison. Refer to page 29.
Open	Enables you to open a saved document comparison. Comparisons are saved as Workshare DeltaFiles (.WDF).
Save	Enables you to save the current document comparison. Refer to <i>Saving Redline Documents</i> , page 52.
Print	Enables you to print the Redline document. Refer to <i>Printing Redline Documents</i> , page 51.
Send	Includes the following sub-options:
Email	Enables you to send the current documents (the original, the modified and the Redline) as email attachments. Refer to <i>Sending Compared Documents by Email</i> , page 50.
Email as Track Changes	Enables you to send the Redline document as an RTF document with the changes shown as track changes. Refer to <i>Sending Compared Documents by Email</i> , page 50.

Option	Description
Preferences	Includes the following sub-options:
User Preferences	Opens the <i>User Preferences</i> dialog where you can specify parameters affecting how Workshare Compare works, for example, whether source and Redline documents are synchronized when navigating. Refer to <i>Configuring User Preferences</i> , page 57.
Edit Rendering Set	Opens the Rendering Set 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 <i>Chapter 5: Configuring Rendering Sets</i> .
Keyboard Shortcuts	Displays a list of keyboard shortcuts available in Workshare Compare.
Workshare Compare Configuration	Opens the Workshare Compare Configuration Manager where, if you have permission, you can configure Workshare Compare, for example, the way it interacts with your DMS and email client. Refer to the <i>Workshare Compare Installation Guide</i> .
Properties	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.
About Workshare Compare	Displays version information about Workshare Compare.
Close	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.



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*, page 45.

Redline Summary

At the 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 06 July 2009 11:06:16

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	
Deletion	
Moved from	
Moved to	
Style change	
Format change	
Moved-deletion	
Inserted cell	
Deleted cell	
Moved cell	
Split/Merged cell	
Padding cell	

Statistics:	
	Count
Insertions	48
Deletions	47
Moved from	9
Moved to	9
Style change	0
Format changed	0
Total changes	113

In order for the Redline document to include this summary, ensure that **Include Redline Summary** is selected in the Redline Options page of the Rendering Set Manager. Refer to *Chapter 5: Configuring Rendering Sets*.

Redline Document Right-Click Menu

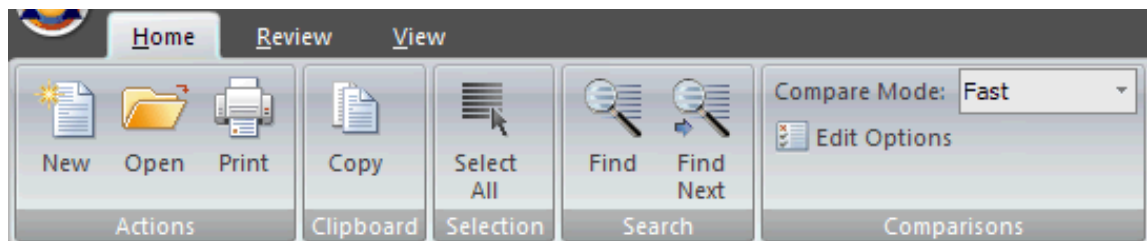
Right-clicking text or changes in the Redline document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the Redline document.
Find	Opens the <i>Find</i> dialog enabling you to search for specified text or keywords in the Redline document.

Option	Description
Find Next	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.
Edit Redline	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to <i>Editing Redline Documents</i> , page 47.
Act on Changes	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to <i>Acting on Changes</i> , page 48.
Zoom	Enables you to change the display of the Redline document from 20% to 200% of its original size.
Link to Move	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 Link to Move highlights the text in its previous position. When right-clicking text in its original position, clicking Link to Move highlights the text in its new position. You must right-click a move-type change for this option to be available.
Link to Change	Jumps to the Redline Summary (at the end of the Redline document) highlighting the selected change. The Include Redline Summary option must be selected in the applied rendering set. Refer to <i>Chapter 5: Configuring Rendering Sets</i> . You must right-click a change for this option to be available.

Home Tab

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



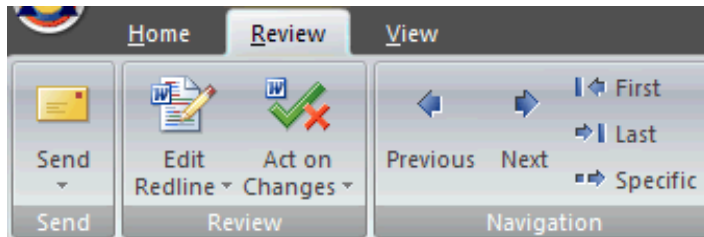
The options are described in the following table.

Group	Option	Description
Actions	New	Opens the <i>Document Selection</i> dialog enabling you to perform a new document comparison. Refer to page 29.
	Open	Enables you to open a saved document comparison. Comparisons are saved as Workshare DeltaFiles (.WDF).
	Print	Enables you to print the Redline document. Refer to <i>Printing Redline Documents</i> , page 51.

Group	Option	Description
Clipboard	Copy	Copies selected text to the clipboard.
Selection	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.
	Find Next	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.
Comparisons	Compare Mode	Enables you to select a comparison mode from the dropdown list and Workshare Compare automatically re-runs the comparison in the selected mode – Standard, Text Only, Fast or Image Based PDF . For more information about the types of comparison, refer to page 25.
	Edit Options	Opens the Comparison Options page of the Rendering Set Manager (see page 63) which includes parameters that enable you to customize how the compare is performed. Refer to <i>Changing how the Comparison is Performed</i> , page 48.

Review Tab

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



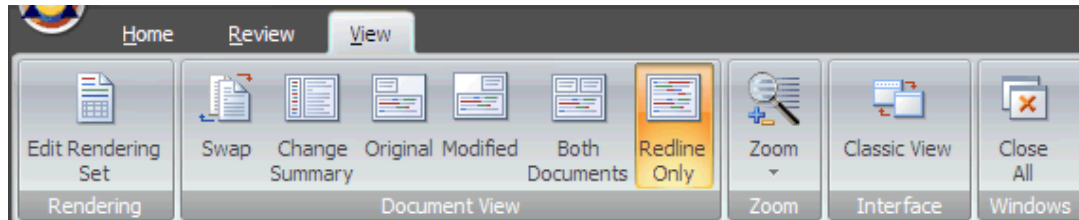
The options are described in the following table.

Group	Option	Description
Send	Send	Email: Enables you to send the current documents (the original, the modified and the Redline) as email attachments. Email as Track Changes: Enables you to send the Redline document as an RTF document with the changes shown as track changes. Refer to <i>Sending Compared Documents by Email</i> , page 50.
Review	Edit Redline	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to <i>Editing Redline Documents</i> , page 47.
	Act on Changes	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to <i>Acting on Changes</i> , page 48.

Group	Option	Description
Navigation	Previous	Navigates to the previous change and highlights the entire change in the Redline document. Refer to <i>Navigating Between Changes</i> , page 45.
	Next	Navigates to the next change and highlights the entire change in the Redline document. Refer to <i>Navigating Between Changes</i> , page 45.
	First	Navigates to the first change and highlights the entire change in the Redline document. Refer to <i>Navigating Between Changes</i> , page 45.
	Last	Navigates to the last change and highlights the entire change in the Redline document. Refer to <i>Navigating Between Changes</i> , page 45.
	Specific	Enables you to navigate to a specific change number. The entire change is highlighted in the Redline document. Refer to <i>Navigating to a Specific Change</i> , page 45.

View Tab

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



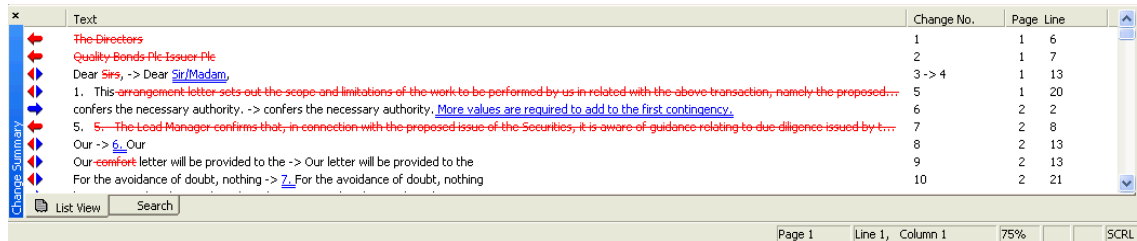
The options are described in the following table.

Group	Option	Description
Rendering	Edit Rendering Set	Opens the Rendering Set 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 <i>Chapter 5: Configuring Rendering Sets</i> .
Document View	Swap	Swaps the original and modified documents. Refer to <i>Swapping the Source Documents</i> , page 47.
	Change Summary	Displays/hides the Change Summary window. Refer to <i>Change Summary Window</i> , page 43.
	Original	Displays only the original document in the Source Documents window. Refer to <i>Source Documents Window</i> , page 44.
	Modified	Displays only the modified document in the Source Documents window. Refer to <i>Source Documents Window</i> , page 44.

Group	Option	Description
	Both Documents	Displays both the original and the modified document in the Source Documents window. Refer to <i>Source Documents Window</i> , page 44.
	Redline Only	Displays only the Redline document.
Zoom	Zoom	Enables you to change the display of the Redline, original or modified document from 20% to 200% of its original size.
Interface	Classic View	Switches to the Classic interface of Workshare Compare where options are displayed either within menus or on a toolbar.
Windows	Close All	Closes all open Redline documents.

Change Summary Window

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



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

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 also float over the other windows. Click and drag the title bar of the Change Summary window to move it to a different location.*

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

- Text** Details of the change.
- Change No** 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.

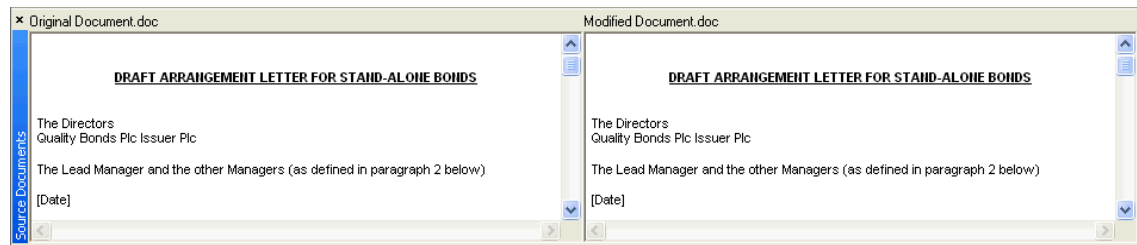
The icons to the left of each change indicate the type of change as follows:

-  Red/blue arrow heads Deletion and insertion on same line.
-  Green double-headed arrow Moved text.
-  Red left-pointing arrow Deleted text.
-  Blue right-pointing arrow Inserted text.
-  Red double-headed arrow Move/deletion – moved text, which includes a deletion.

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*, page 46.

Source Documents Window

From the View Ribbon, you can select to display 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.

You can display one or both of the source documents in the Source Documents window using the options in the View Ribbon.

***Tip!** The Source Documents window is by default positioned across the top of the Workshare Compare environment. It can also float over the other windows. Click and drag the title bar of the Source Documents window to move it to a different location.*

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
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the original or modified document.
Find	Opens the <i>Find</i> dialog enabling you to search for specified text or keywords in the original or modified document.
Find Next	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.

Option	Description
Act on Changes	Enables you to implement changes shown in the Redline document using track changes functionality. Refer to <i>Acting on Changes</i> , page 48.
Zoom	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.

<u>Work and Procedures</u>	
14.	<p>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]. 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:

Enter the change number to go to within the current document.

Change Number:

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** checkbox selected in the *Change Numbering Format* page. Refer to Chapter 5: Configuring Rendering Sets. This shows all the change numbers against each change in the Redline document Dear ~~Sirs~~¹, Sir/Madam².

Searching for Changes

You can search for changes in the Redline document that include a specified keyword or text.

To search for a change:

1. In the Change Summary window, select the **Search** tab.

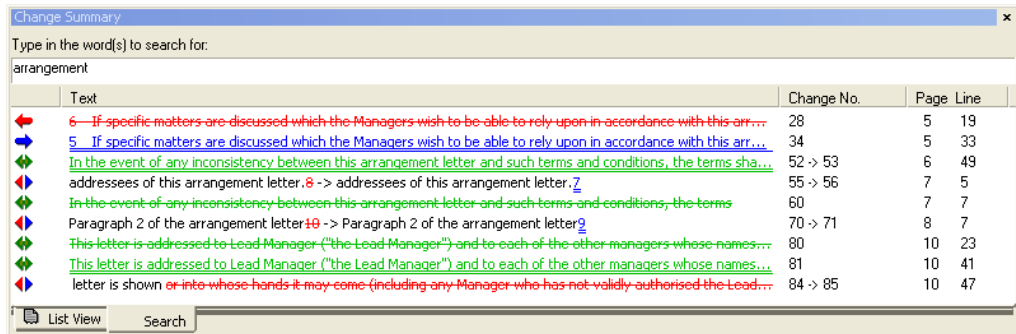
Change Summary

Type in the word(s) to search for:

Change No.	Page Line

List View Search

- In the upper text box, enter the search criteria – the word or words for which you want to search, and press **Enter** on your keyboard. A list of changes that include the specified word or words is displayed in the lower text area.



Note: Workshare Compare only searches the changes for the specified text. It does not search the text of the original or modified documents. To search the entire text of the original, modified or Redline documents, use the **Find** and **Find Next** options in the Home Ribbon.

- Repeat step 2 to run another search if required.

Swapping 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 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:

- 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.
- 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 How the Comparison is Performed

You can re-run a comparison using a different comparison mode (or type) if required. The different types of comparison are described on page 25. You can also customize how the compare is performed by editing the Comparison Options parameters of the rendering set and then re-running the comparison.

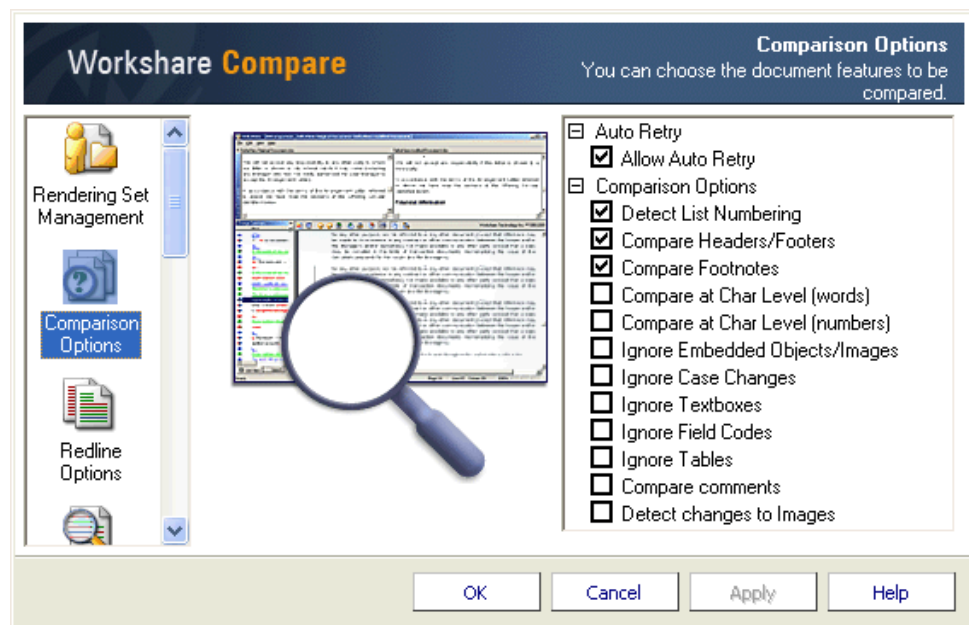
To re-run a comparison using a different mode:

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

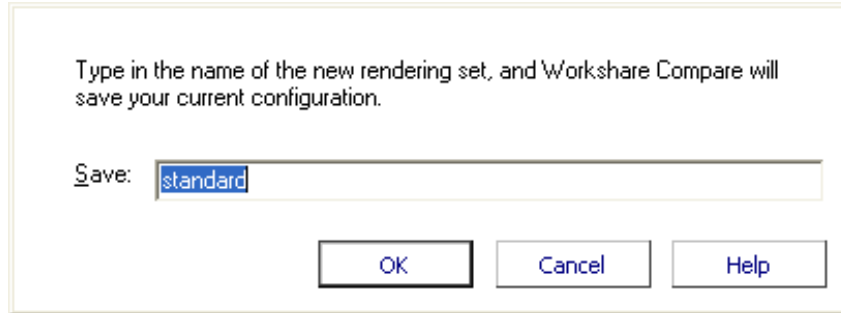
- **Standard:** Workshare Compare performs a regular comparison.
- **Fast:** (Only available when comparing a .DOC file against another .DOC file.) Workshare Compare performs a binary comparison. A binary comparison is faster than a standard comparison because it is comparison at the binary level.
- **Text Only:** Workshare Compare performs a text-only comparison, comparing only the text in a document and not the formatting or styles.
- **Image Based PDF:** (Only available when comparing a PDF and when you have an ABBYY Recognition Server configured.) Workshare Compare passes the PDF to an ABBYY Recognition Server for automated OCR processing and receives back an RTF with which to perform a comparison.

To re-run a comparison with different options:

1. Click **Edit Options** in the Home Ribbon. The Rendering Set Manager is opened with the Comparison Options page displayed.



2. Edit the Comparison Options parameters as required. For example, select to ignore field codes and tables. The Comparison Options parameters are described in full on page 63.
3. Click **OK**. The following dialog is displayed:



4. 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 |.
5. Click **OK**. Workshare Compare re-runs the comparison using the rendering set with the revised comparison options.

Acting on 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: In order for the Act on Changes functionality to be enabled, the **Use Right Click Act on Changes** parameter (**Administration** category) must be selected in the Workshare Compare Configuration Manager. Refer to the Workshare Compare Installation Guide.

To act on changes:

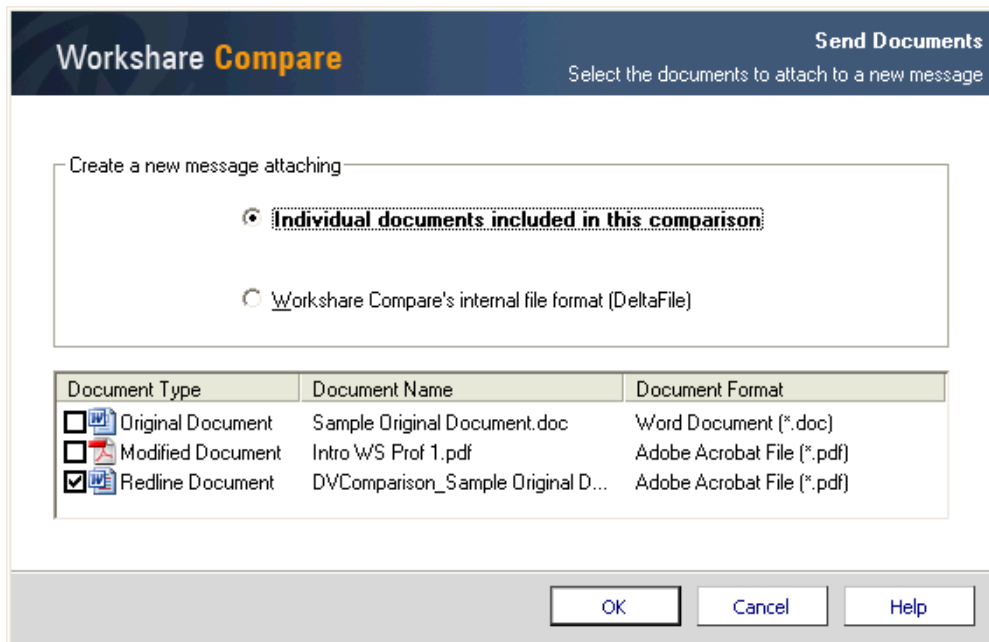
1. Click **Act on Changes** in the Review Ribbon or right-click in the Redline document and select **Act on Changes**. The Redline document is opened in Microsoft Word as a DOC/DOCX file with the default name TrackChangeRedline.doc/docx. All the changes are displayed as track changes.
2. Review the track changes and implement them as required.
3. Save the document. By default, TrackChangeRedline.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.

Sending Comparisons 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 an RTF file which shows the changes as track changes when opened in Microsoft Word. This is useful if the recipient does not have Workshare Compare.

To send Redline documents by email:

1. Click **Send** and then **Email** in the Review Ribbon or **Email** in the Quick Access Toolbar or select **Send** then **Email** from the Logo menu. The *Send Documents* dialog is displayed.



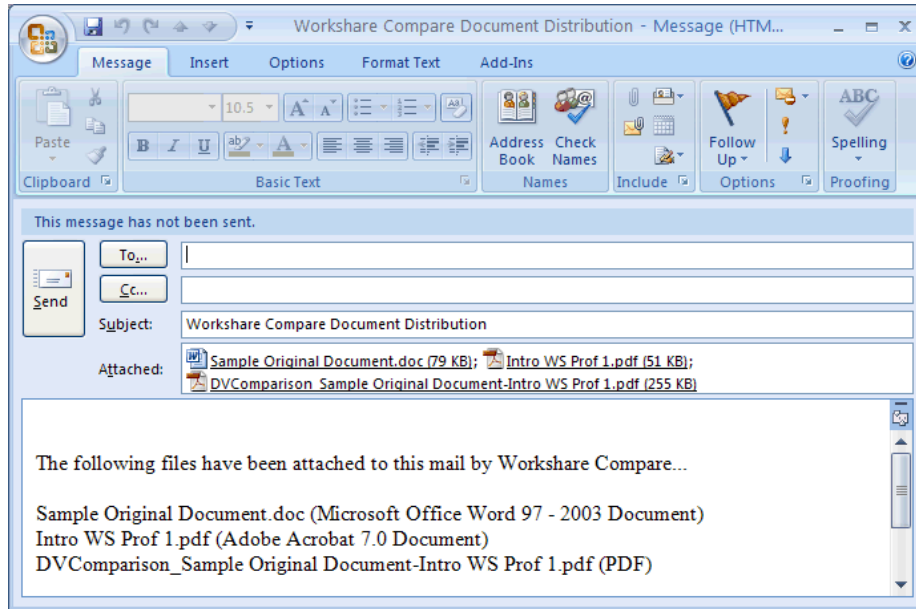
2. Select the files to send by selecting one of the following options:
 - **Individual documents included in this comparison**
Selecting this option displays a list of the documents included in the comparison in the lower pane. Select the checkboxes to the left of the documents you want to send.

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 to change the default format, for example, to RTF. Use this option if the recipient does not have Workshare Compare.

- **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** fields to change the name of the original document, the modified document or the Redline document.

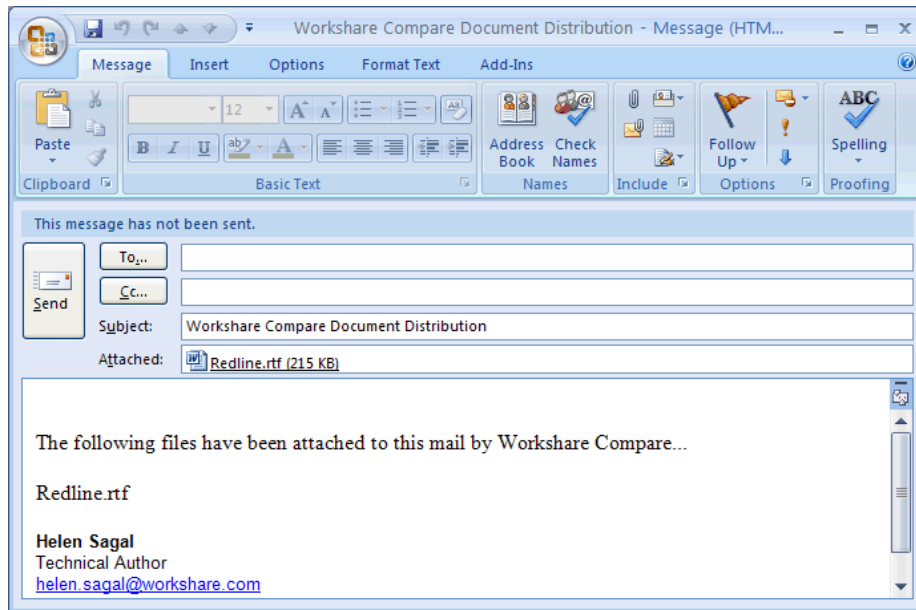
3. Click **OK**. An email message window is displayed with the selected files as attachments.



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 **Send** and then **Email as Track Changes** in the Review Ribbon or select **Send** then **Email as Track Changes** from the Logo menu. The Redline document is saved as an RTF document (Redline.rtf) with the changes indicated by track changes and an email message window is displayed with the RTF file as an attachment.



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

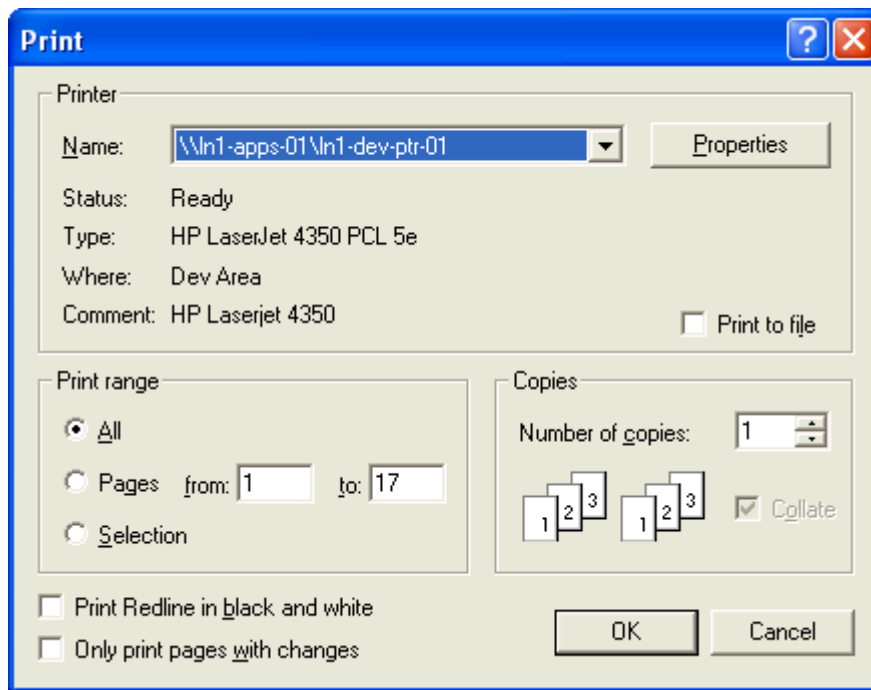
When the recipient opens the RTF in Microsoft Word, the changes are displayed as track changes.

Printing Redline Documents

You can print the Redline document at any time.

To print the Redline document:

1. Click **Print** in the Home Ribbon or in the Quick Access Toolbar or select **Print** from the Logo menu. 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 color 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**.

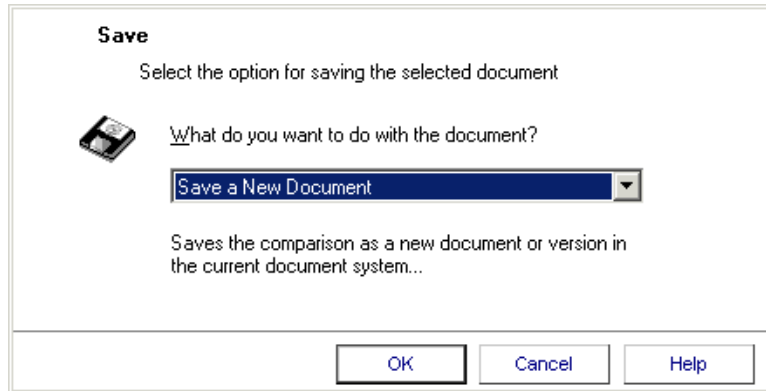
Saving Redline Documents

You can save the 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, HTML, TXT or PDF file.

You can save the Redline document to your DMS, SharePoint or locally. The following procedure describes how to save to DOCS Open 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 Document* dialog is displayed.



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

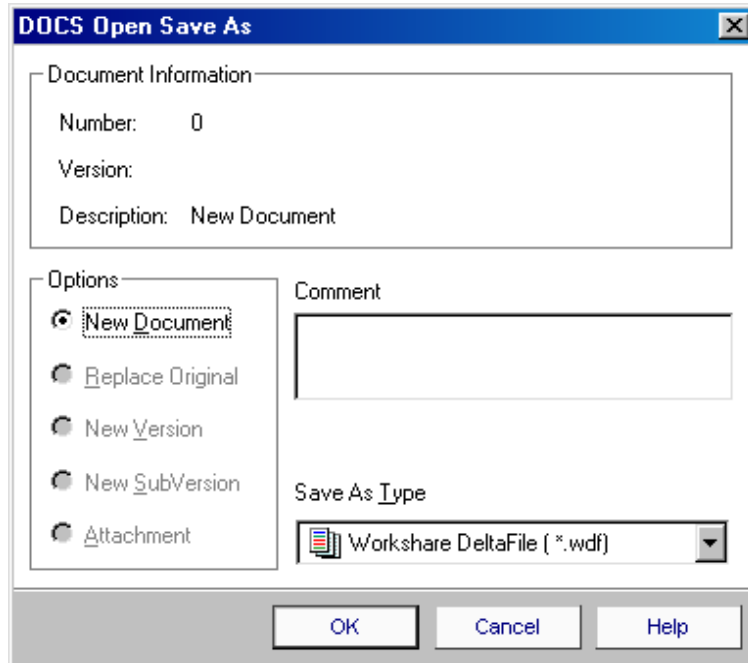
Tip! If you are working with a DMS or SharePoint but both documents compared are local documents, then you can press the **Shift** key while clicking **Save** and the LocalStore Save As dialog is displayed.

2. 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 Interwoven or DOCS Open integration and the original document is from Interwoven or DOCS Open)
 - **Attach/Relate to Modified Document** (Only available when using the Interwoven or DOCS Open integration and the modified document is from Interwoven 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.

3. Click **OK**. The *DOCS Open 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.

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

- | | |
|-------------------------|--|
| New Document | To save the Redline document as a completely new document. If the Redline document has not been saved before and you selected Save a New Document in the <i>Save Document</i> dialog, this is the only option enabled. |
| Replace Original | To replace the original document of the comparison with the Redline document. This option is only enabled if the Redline document has been saved before and you selected Save a New Document in the <i>Save Document</i> dialog. |
| New Version | 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 Save a New Document in the <i>Save Document</i> dialog. |
| Related Document | (Interwoven 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 <i>Save Document</i> dialog. |

- New Sub Version** (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 Document* 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 Document* dialog.
5. (Interwoven 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:

Workshare DeltaFile (*.wdf)	Saves both the Redline document and the source documents as a Workshare DeltaFile. This file can only be opened in Workshare Compare.
Word Document (*.doc)	Saves the Redline document as a Microsoft Word file. The source documents are not saved.
Text Only (*.txt)	Saves the Redline document as a text 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.
HTML Document (*.htm)	Saves the Redline document as a HTML document. The source documents are not saved.
Adobe Acrobat File (*.pdf)	Saves the Redline document as a PDF file. The source documents are not saved.
 7. Click **OK**. The standard DOCS Open save dialog is displayed.
 8. Complete the fields as required and click **OK**.

Note: Not all formats are always available. The administrator may have disabled some formats.

Tip! You cannot save different versions of a DOCS Open document in different formats. For example, if you have chosen to save a comparison as a Workshare Compare DeltaFile then all subsequent versions of that comparison must be saved in Workshare Compare DeltaFile format.

Note: If the administrator has restricted the save format, and the base document is of a different type to the administrator-defined format, the DOCS base document type will take precedence. For example, if the administrator has restricted the save format to RTF. If you try and save a Redline document as a version of the original or modified document, the version created is saved in Microsoft Word format rather than the administrator-defined RTF format.

Tip! For newly profiled documents, the file format chosen determines the application ID that will be used on the DOCS profile. For Workshare DeltaFile format, Workshare is used and for Microsoft Word and Rich Text Format, MS Word is used.

Note: If the comparison has been saved as an attachment (both rich text format and Workshare DeltaFile files) you can only retrieve it by right-clicking the original or modified document and selecting **Compatible Apps.....**

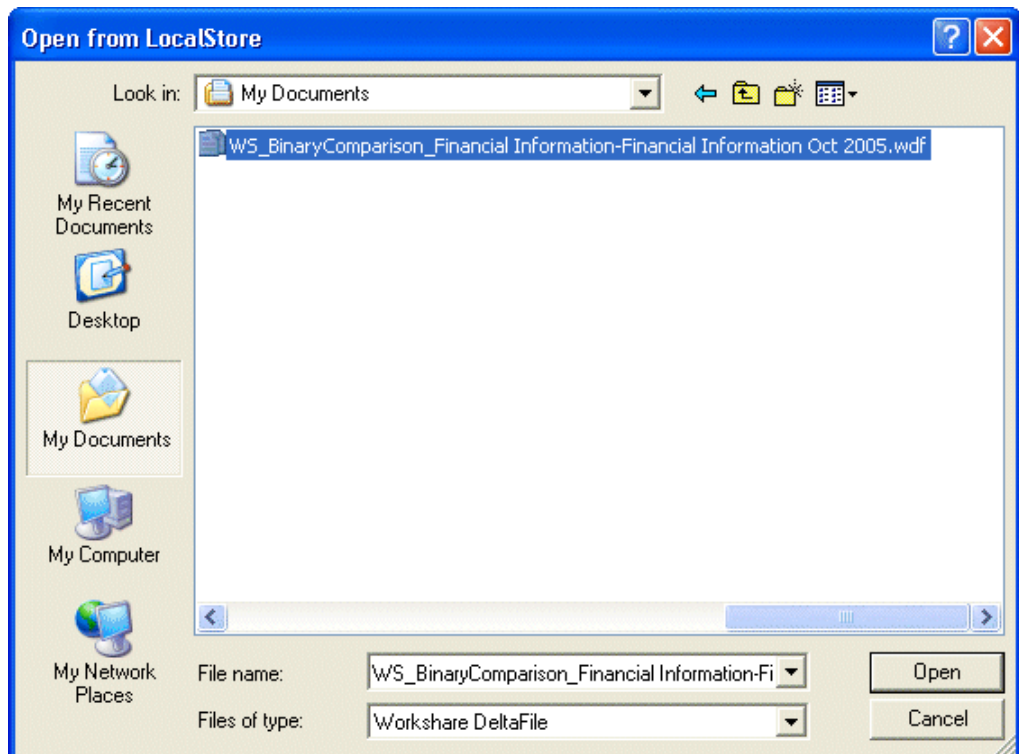
Opening Saved Workshare Compare DeltaFiles

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 or SharePoint accesses the DMS or SharePoint. To open from a local or network drive, hold the Shift key down when clicking **Open**.



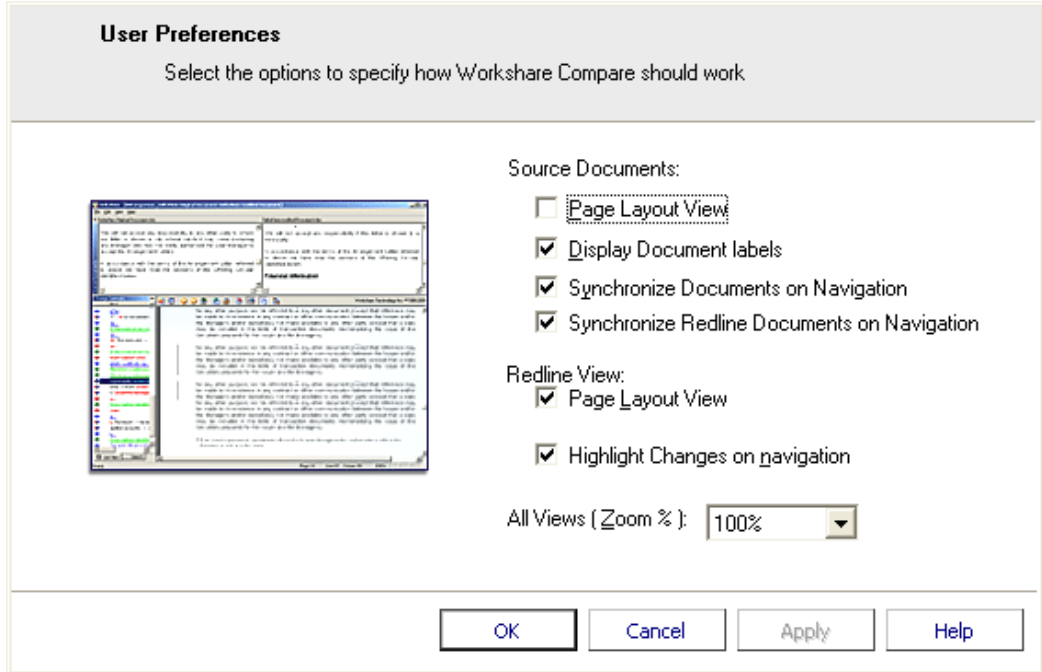
2. Navigate to the location where the comparison is saved and select the WDF file you want to open.
3. Click **Open**. The selected comparison is opened in Workshare Compare. The source documents and the Redline document are displayed.

Configuring User Preferences

User preferences define the behavior of Workshare Compare in certain circumstances. For example, you can specify the view of the source documents and the Redline document.

To configure user preferences:

1. From the Logo menu, select **Preferences** and then **User Preferences**. The *User Preferences* dialog is displayed:



2. Select and deselect options as required. The options available are as follows:

Parameter	Description
Source Documents	
Page Layout View	If selected, the original and modified documents are displayed in Page Layout view in the Source Documents window.
Display Document labels	If selected, the names of the original and modified documents are displayed above them in the Source Documents window.
Synchronize Documents on Navigation	If selected, the views of the original, modified and Redline documents scroll to the same point when you click a paragraph in any of the documents.
Synchronize Redline Documents on Navigation	If selected, when an original document has been compared against multiple modified documents, then the views of each Redline document (in their individual tabs) scroll to the same approximate point when you click a paragraph in any of the Redline documents. This parameter is only enabled when the Synchronize Documents on Navigation parameter is selected.

Parameter	Description
Redline View	
Page Layout View	If selected, the Redline document is displayed in Page Layout view.
Highlight Changes on navigation	If selected, the changes made to the original document are highlighted in the Redline document when you navigate to them. For example, by selecting a change in the Change Summary window..
All Views (Zoom %)	Enables you to select the magnification of the source documents and the Redline document as they appear in the Workshare Compare main window. You can select from 25% to 200%.

3. Click **OK**.

Chapter 5. Configuring Rendering Sets

This chapter 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 Compare rendering sets and describes how they determine the look of a Redline document.
- **Applying Rendering Sets**, page 60, describes how to apply a rendering set to a comparison.
- **Customizing Rendering Sets**, page 61, describes how to create your own rendering sets as well as modify and delete existing rendering sets.
- **Rendering Set Parameters**, page 62, provides a detailed description of all the parameters included in rendering sets.

Introducing Rendering Sets

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?

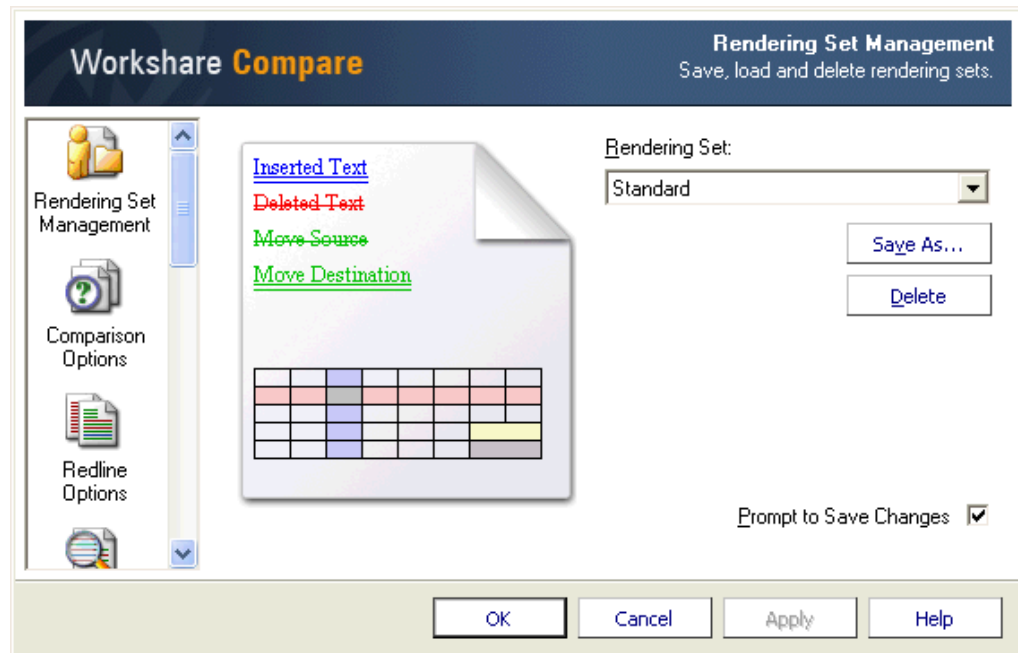
Rendering sets are stored locally in **C:\Program Files\Workshare\Modules\Rendering**, until you move them to a network drive when rolling Workshare Compare out to all users.

Applying Rendering Sets

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

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

1. In the Workshare Compare main window, click **Edit Rendering Set** in the View Ribbon or from the Logo menu select **Preferences** and then **Edit Rendering Set**. The Rendering Set Manager is displayed with the Rendering Set Management page open.



2. From the **Rendering Set** dropdown list, select a rendering set to apply to the comparison.
3. Click **OK**. Workshare Compare re-performs the comparison applying the new rendering set styles to the resulting Redline document.

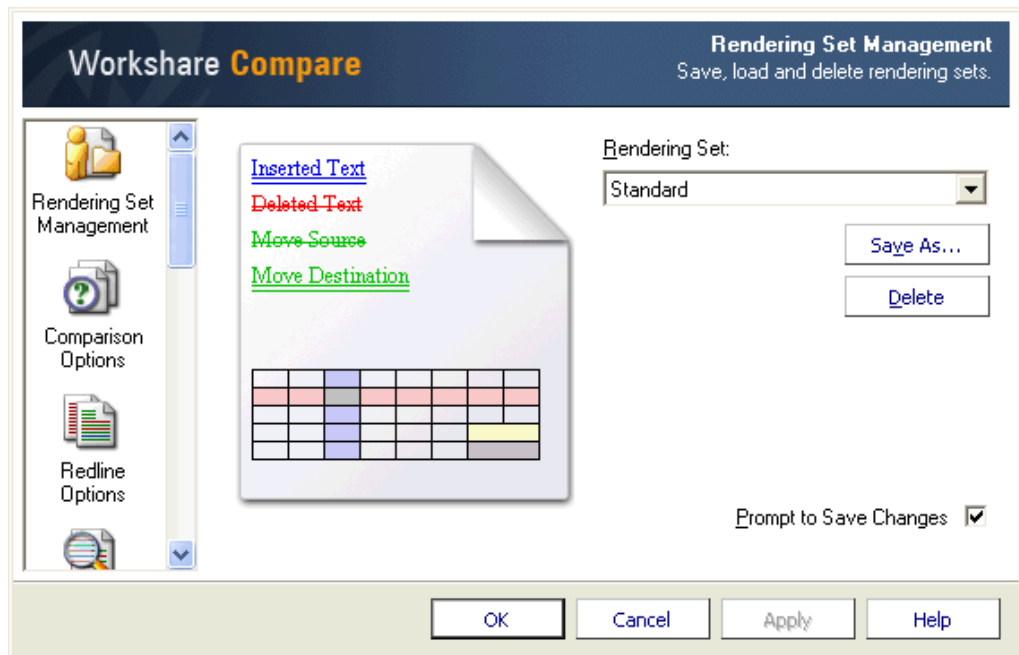
Customizing Rendering Sets

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.

To customize a rendering set:

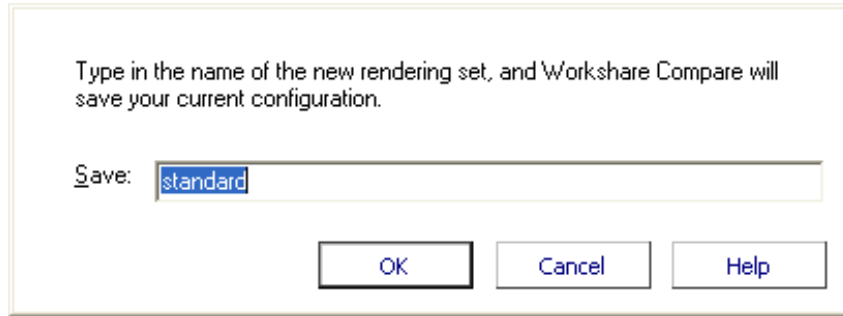
1. In the Workshare Compare main window, click **Edit Rendering Set** in the View Ribbon or from the Logo menu select **Preferences** and then **Edit Rendering Set**. The Rendering Set Manager is displayed with the Rendering Set Management page open.



2. From the **Rendering Set** dropdown list, select the rendering set you want to modify or on which you want to base a new rendering set.
3. 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*, page 62.

- Click **Save As** in the Rendering Set Management page. The following dialog is displayed:



- 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 |.
- Click **OK**.

Deleting Rendering Sets

In the Rendering Set Management page of the Rendering Set Manager, select the rendering set to delete from the **Rendering Set** dropdown list and click **Delete**.

Rendering Set Parameters

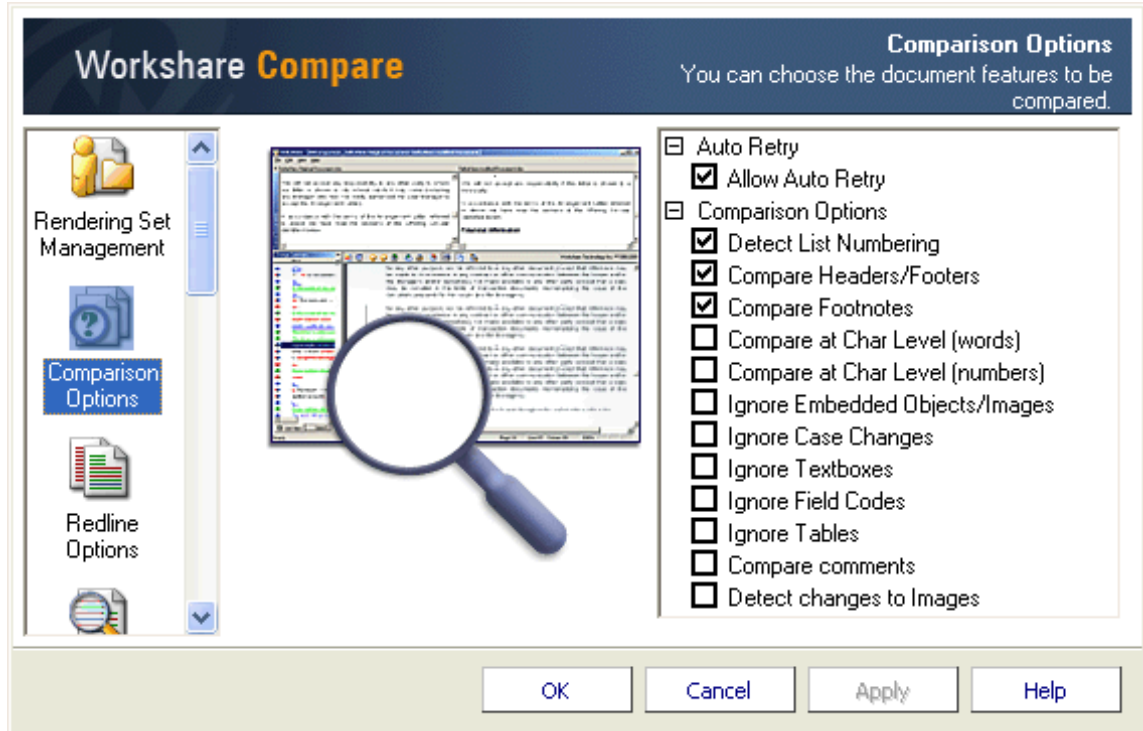
The parameters for rendering sets are grouped into the following categories:

- Comparison Options, page 63.
- Redline Options, page 65.
- Readability Options, page 67.
- Inserted Text Format, page 69.
- Deleted Text Format, page 70.
- Moved Text Format, page 71.
- Font Change Format, page 72.
- Style Change Format, page 72.
- Table Cell Format, page 74.
- Change Numbering Format, page 75.

The categories appear in the left pane of the Rendering Set Manager. Selecting a category displays the parameters for that category in the right pane of the Rendering Set Manager. The different categories and their parameters are described in the following sections.

Comparison Options

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



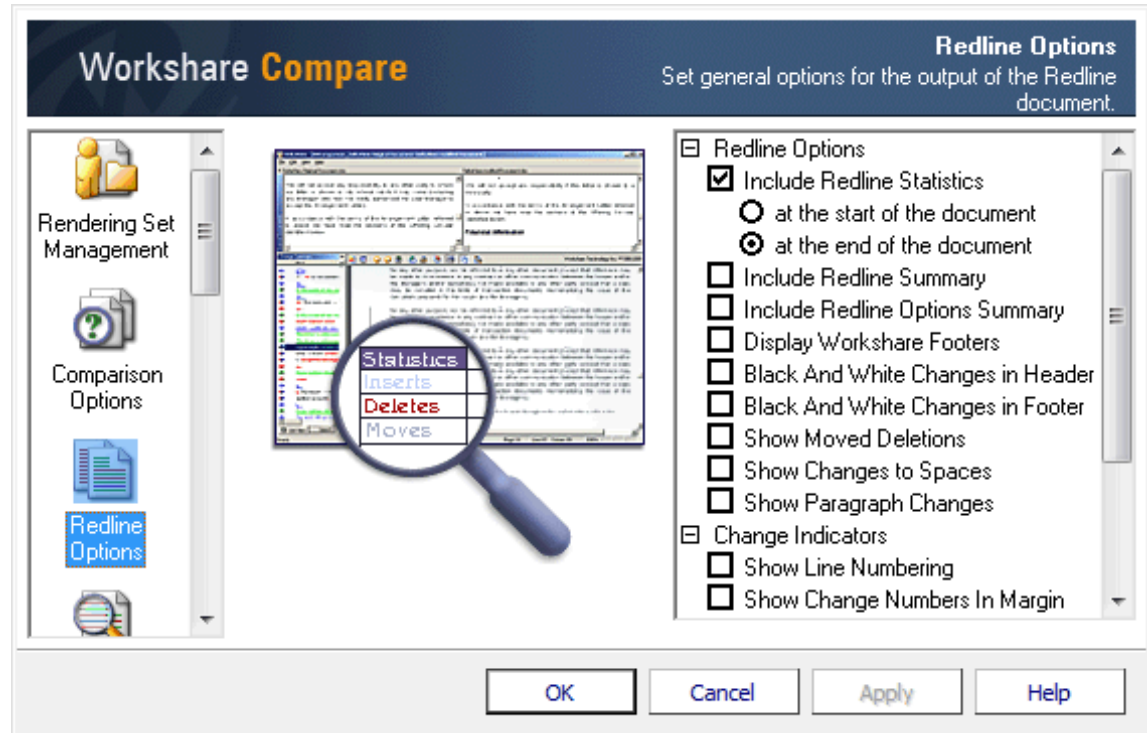
The Comparison Options parameters are described in the following table:

Parameter	Description
Allow Auto Retry	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.
Detect List Numbering	If selected, changes to automatically generated list numbers for numbered paragraphs are detected.
Compare Headers/Footers	If selected, the headers and footers in the original and modified documents are compared.
Compare Footnotes	If selected, the footnotes in the original and modified documents are compared.
Compare at Char Level (words)	If selected, words that are only slightly different from each other are compared. For example, if banana has been changed to bananas - Workshare Compare shows just an insertion of an s in the Redline document, rather than showing a deletion of banana and an insertion of bananas . This is intended to catch simple typing mistakes.
Compare at Char Level (numbers)	As above description, but compares numbers instead of characters.

Parameter	Description
Ignore Embedded Objects/Images	<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 Detect changes to Images 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>
Ignore Case Changes	<p>If selected, any case changes, for example, upper case to lower case, made in the modified document are ignored.</p>
Ignore Text Boxes	<p>If selected, any text boxes in the modified document are ignored.</p>
Ignore Field Codes	<p>If selected, any field codes in the modified document are ignored.</p>
Ignore Tables	<p>If selected, any tables in the modified document are ignored.</p>
Compare Comments	<p>If selected, comments in the original and modified documents are compared.</p>
Detect changes to Images	<p>If selected, images in the original and modified documents are compared.</p> <p>In order for images to be compared, you must ensure that the Ignore Embedded Objects/Images parameter is NOT selected.</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.



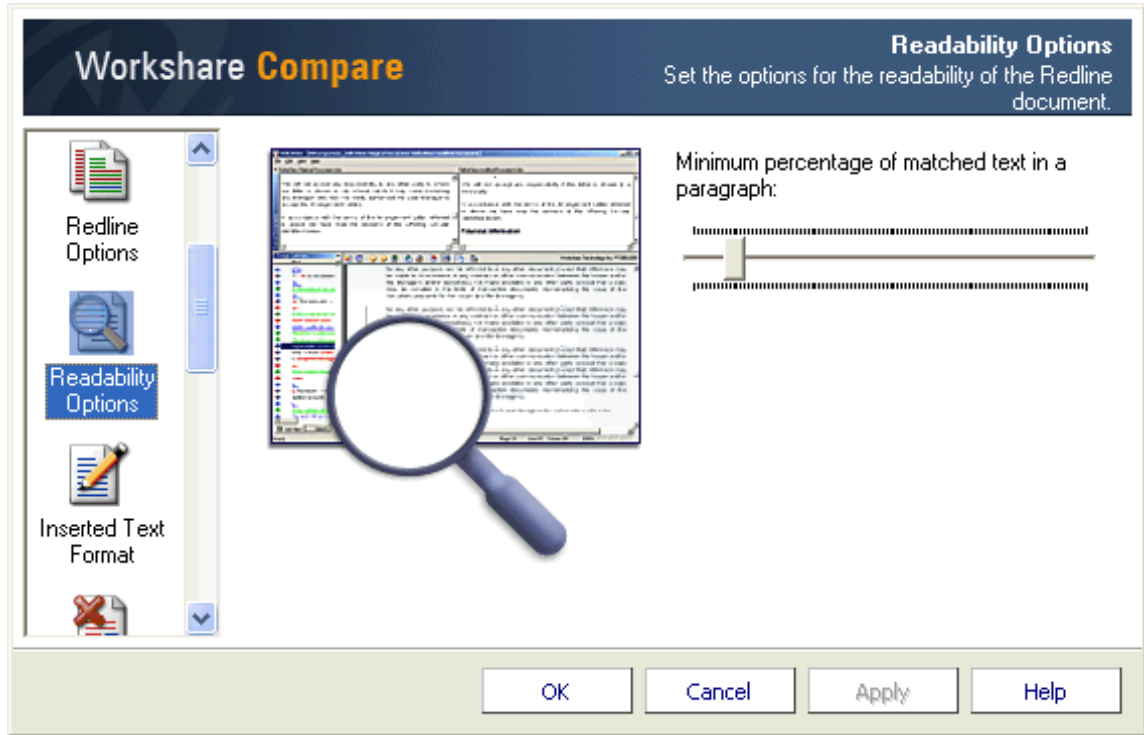
The Redline Options parameters are described in the following table:

Parameter	Description
Redline Options	
Include Redline Statistics	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 at the start of the document or at the end of the document .
Include Redline Summary	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.
Include Redline Options Summary	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.
Display Workshare Footers	If selected, details about the two documents being compared are displayed in the footer of the Redline document.
Black And White Changes in Header	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.

Parameter	Description
Black And White Changes in Footer	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.
Show Moved Deletions	If selected, text that was deleted from a section of the document and then subsequently moved to a new location is indicated.
Show Changes to Spaces	If selected, any extra spaces that have been added to or deleted from the modified document are indicated.
Show Paragraph Changes	If selected, paragraph markers (¶) of any extra paragraphs that have been added to or deleted from the modified document are displayed.
Change Indicators	
Show Line Numbering	If selected, the line number is displayed to the left of each line in the Redline document.
Show Change Numbers in Margin	If selected, the change number is displayed next to each change in the Redline document. You can select to display the number either in the Left or Right margin.
Show Change Bars	If selected, vertical lines to indicate a change are displayed next to each change in the Redline document. You can select to display the lines either in the Left or Right margin.
Show Hidden Text	If selected, hidden text is displayed in the Redline document.

Readability Options

The **Readability** category includes a parameter that 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:

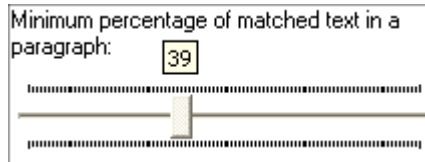
~~DeltaView Redline with Table of Contents: (Vendor)When performing a redline where the document contains an automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is *.wdf. Workaround: Save the redline as 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.

In the Readability Options page, 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, as follows:

In the Readability Options page, drag the slider under the **Minimum percentage of matched text in a paragraph** field to your required setting. As you drag the slider, the percentage is shown as 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%.

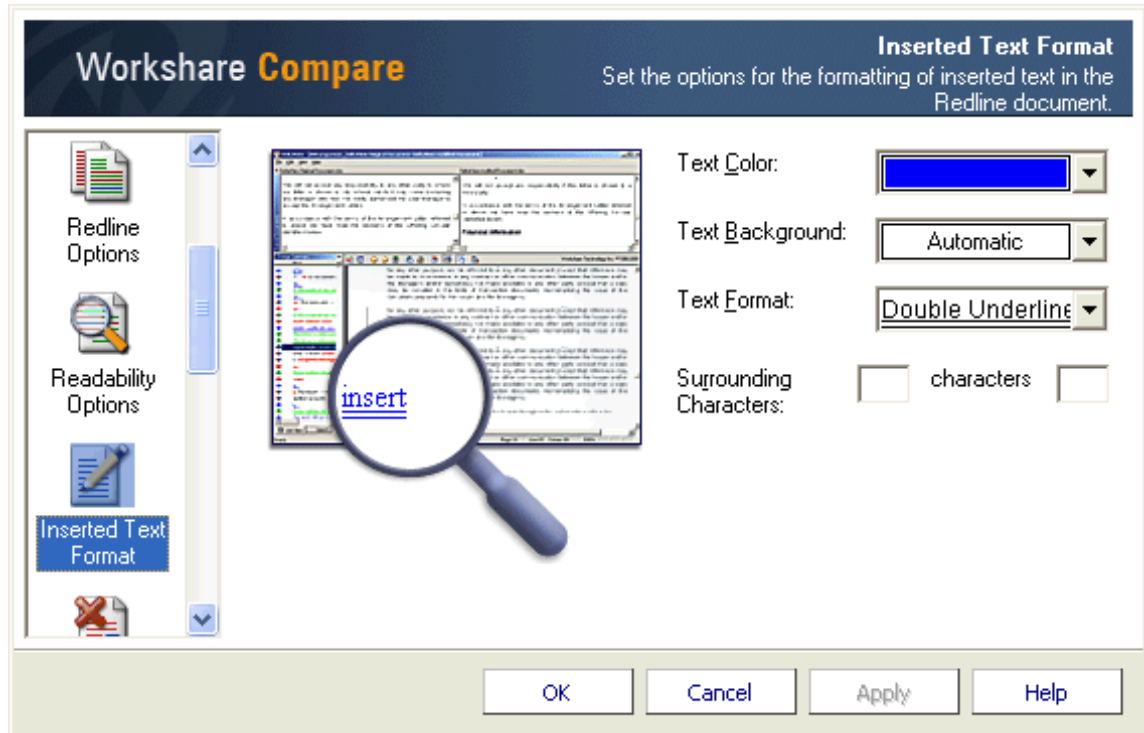
Workshare Compare looks at each paragraph separately and assesses its readability according to the number of changes in the paragraph.

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.

Inserted Text Format

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

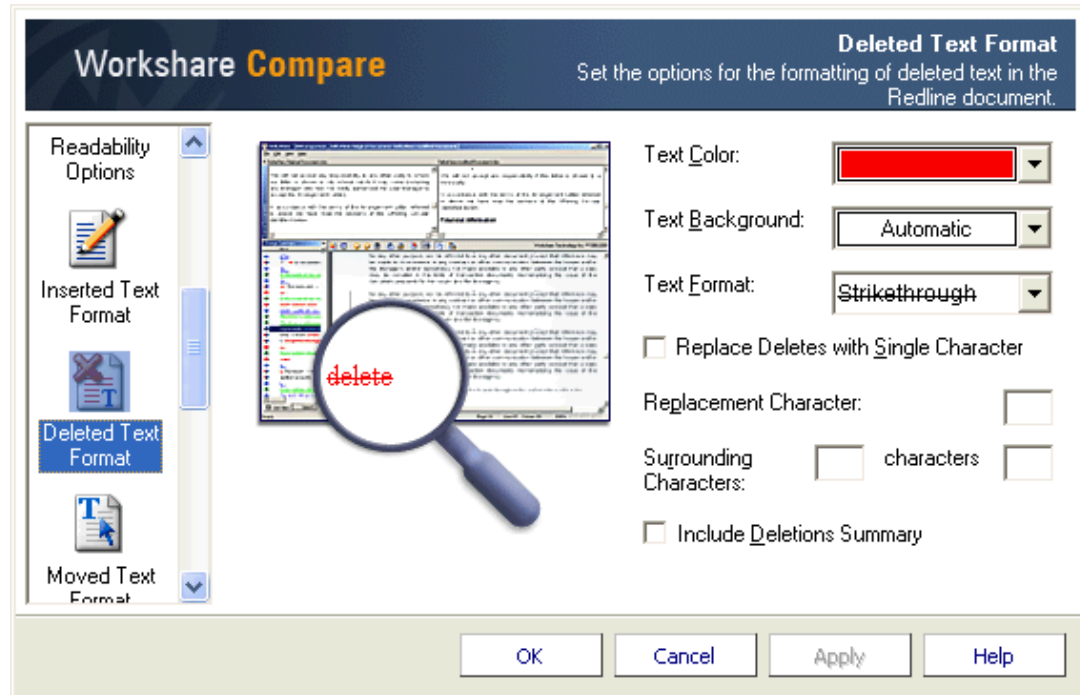


The Inserted Text Format parameters are described in the following table:

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

Deleted Text Format

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

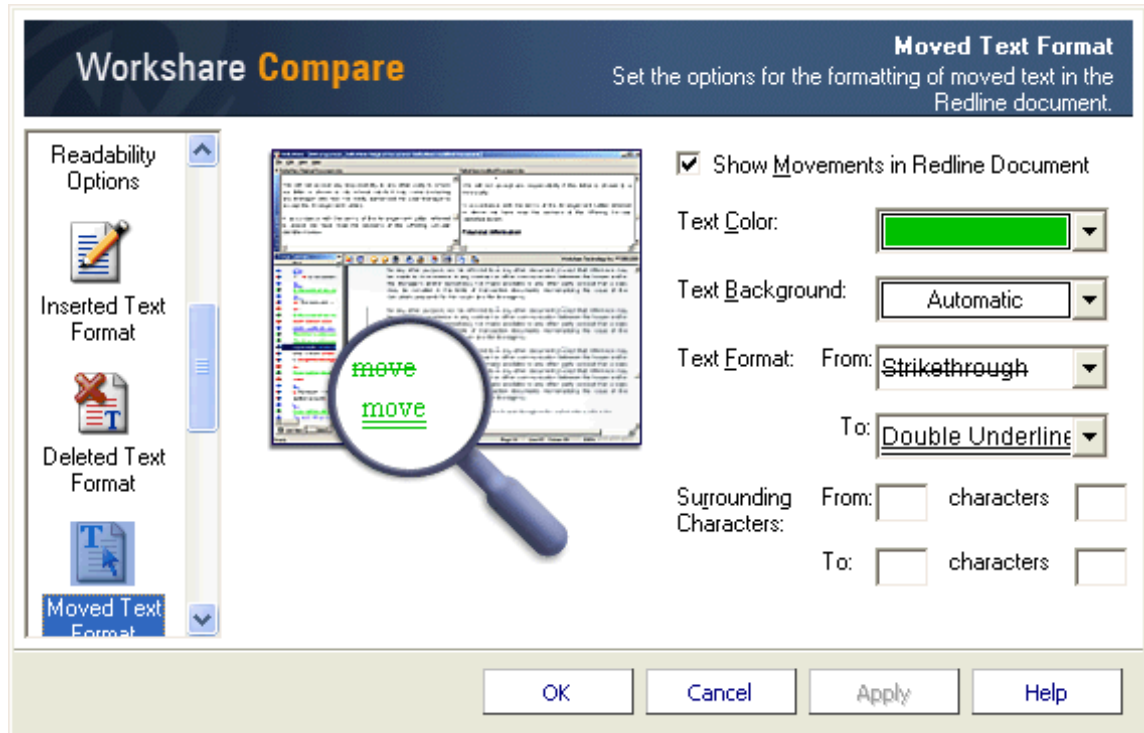


The Deleted Text Format parameters are described in the following table:

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

Moved Text Format

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

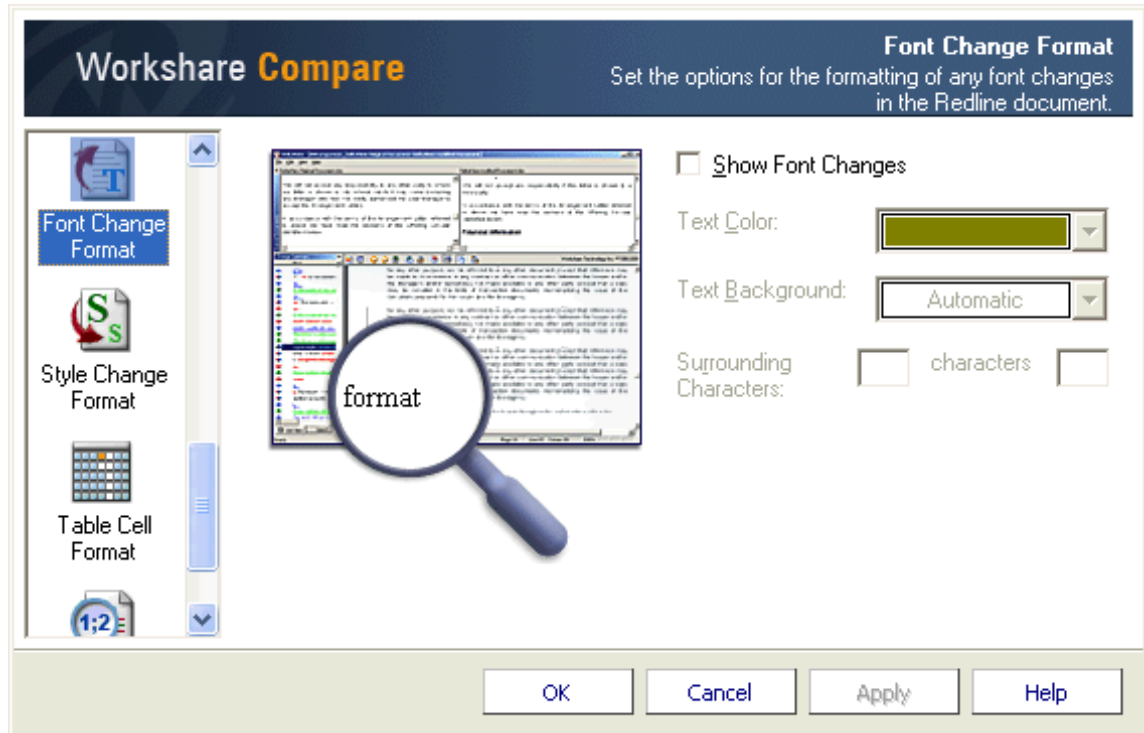


The Moved Text Format parameters are described in the following table:

Parameter	Description
Show Movements in Redline Document	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.
Text Color	The color of moved text.
Text Background	The color of the background of moved text.
Text Format	The format of moved text. Select the format of the text in its original position from the From dropdown list and in its new position from the To dropdown list. Select from <u>Underline</u> , <u>Double Underline</u> , <i>Italic</i> or Strikethrough .
Surrounding Characters	A keyboard character to go before and after moved text. Specify the characters to surround the text in its original position in the From fields and in its new position in the To fields.

Font Change Format

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



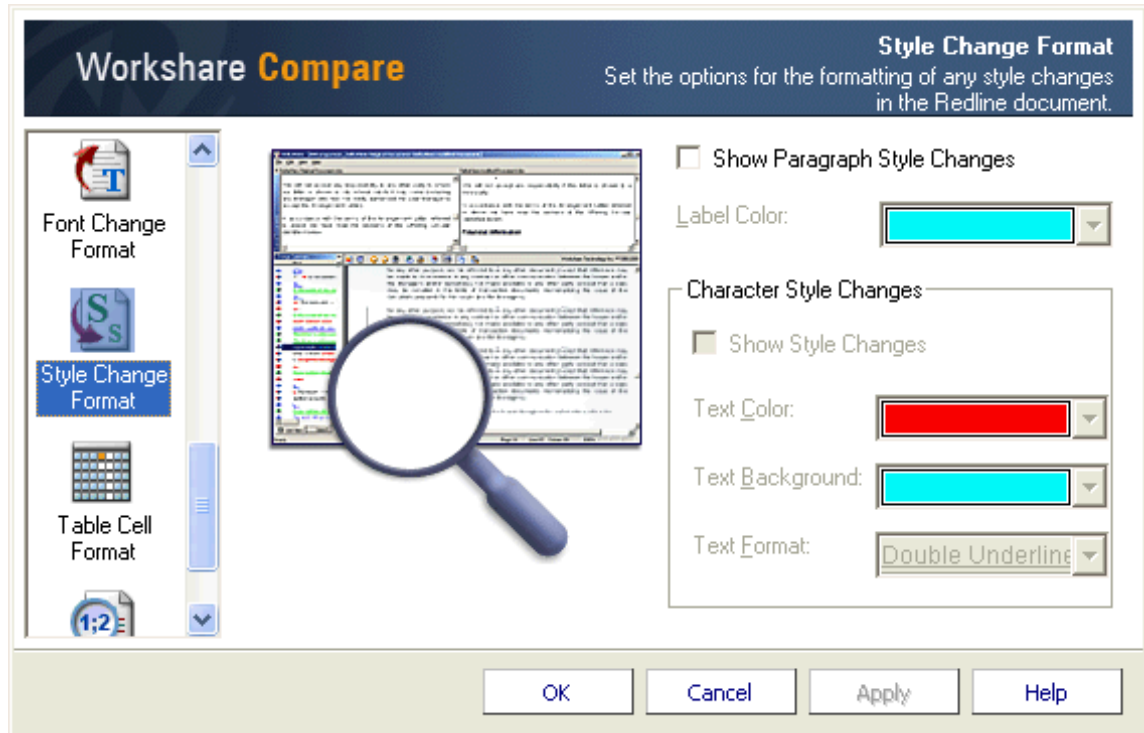
The Font Change Format parameters are described in the following table:

Parameter	Description
Show Font Changes	If selected, font changes are shown in the Redline document.
Text Color	The color of font changes.
Text Background	The color of the background of font changes.
Surrounding Characters	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 Change Format

The **Style Change Format** category includes parameters that enable you to customize how you would like any style changes to appear in the Redline document.



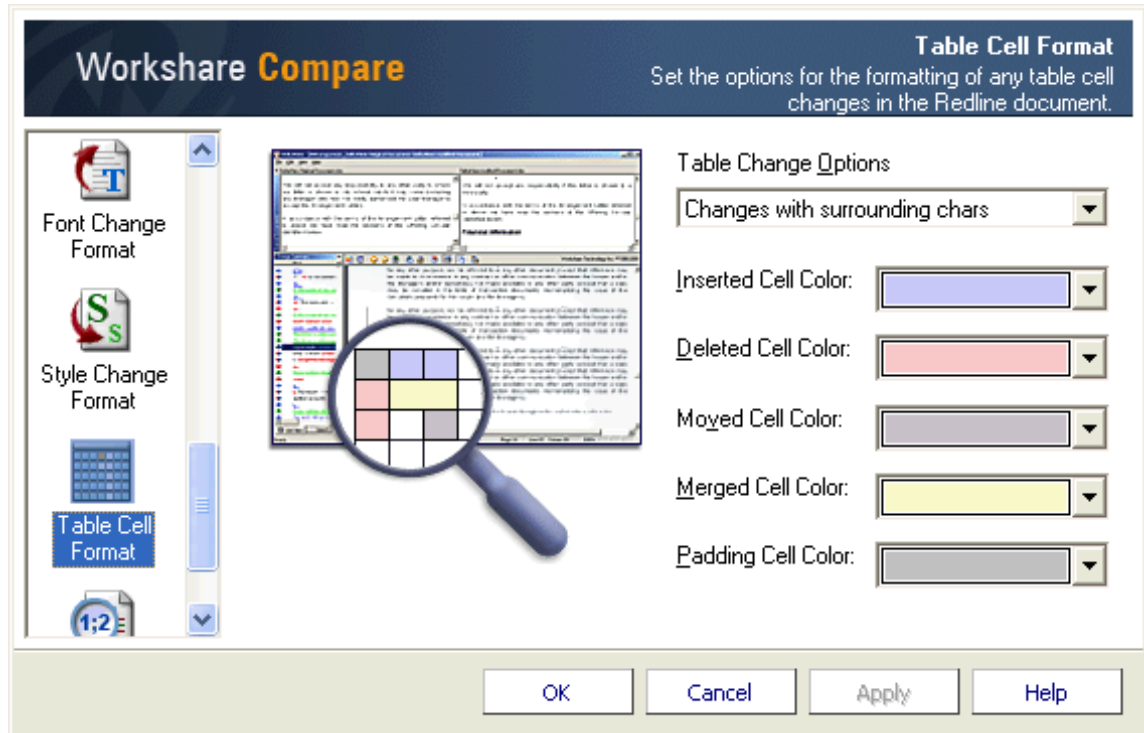
The Style Change Format parameters are described in the following table:

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

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

Table Cell Format

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



The Table Cell Format parameters are described in the following table:

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

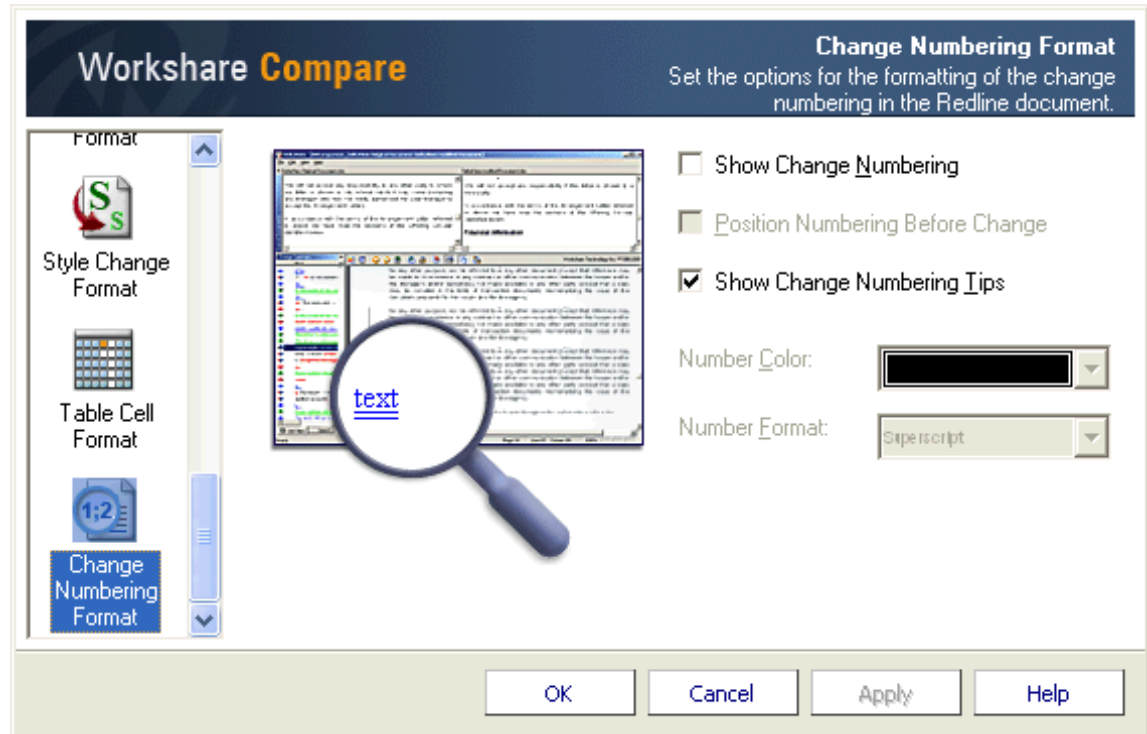
Cell 1	Cell 3
Cell A	Cell B
Cell 4	Cell 6

Rendered Table

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

Change Numbering Format

The **Change Numbering Format** category 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 Format parameters are described in the following table:

Parameter	Description
Show Change Numbering	If selected, the number of the change is displayed next to each change in the Redline document.
Position Numbering Before Change	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. This parameter is only enabled when Show Change Numbering is selected.
Show Change Numbering Tips	If selected, tool tips are displayed when you position the cursor over change numbers.
Number Color	The color of change numbers. This parameter is only enabled when Show Change Numbering is selected.
Number Format	The format of change numbers. Select from a range of formats, including Superscript or Bold . This parameter is only enabled when Show Change Numbering is selected.

Appendix A. Offline Mode

When working with a DMS, it is possible to work on documents in offline mode. To do so, the documents are checked out of the DMS into a local offline directory. The documents can then be worked on locally, for example, on a laptop while traveling. Later, the documents are checked back into the DMS. When working with an Interwoven DMS, documents can be checked out into Interwoven Portable. When working with DOCS Open, documents can be checked out into SafetyGain. When working with DM5, documents can be checked out into DM5 Attaché.

The full functionality of Workshare Compare is available offline in the following situations:

- When working offline in DM5 Attaché.
- When working offline in Interwoven Portable for Interwoven DeskSite 6.0, 6.5 and 6.6.

Note: You cannot access Workshare Compare functionality in DOCSOpen (SafetyGain) while offline.

Documents created offline will not have Workshare Compare functionality enabled. You must create the document online and then check it out in order to enable Workshare Compare functionality. Also, documents checked out before Workshare Compare is installed will not have Workshare Compare functionality enabled. You must check the document back in and then check it out again after installing Workshare Compare in order to enable Workshare Compare functionality.

Note: Interwoven: When saving a comparison document while offline, you cannot save the comparison into Interwoven Portable. You can only save locally. Thus when you select **Save**, the local File Save As dialog is displayed. You can save the comparison into the DMS when you are back online.