

REDLINING DOCUMENTS IN AGILOFT

Agiloft customers can utilize a document comparison feature called *redlining*, which supports comparison of two MS Word files (version 2010 or higher). The Word *Track Changes* feature allows a user to input two versions of a given file, creating a new redlined document; the new document shows the changes made between one version and the next. This comparison action is triggered within Agiloft by an action type called a *Document Comparison Action*. The redlined MS Word file can be downloaded through Agiloft's user interface.

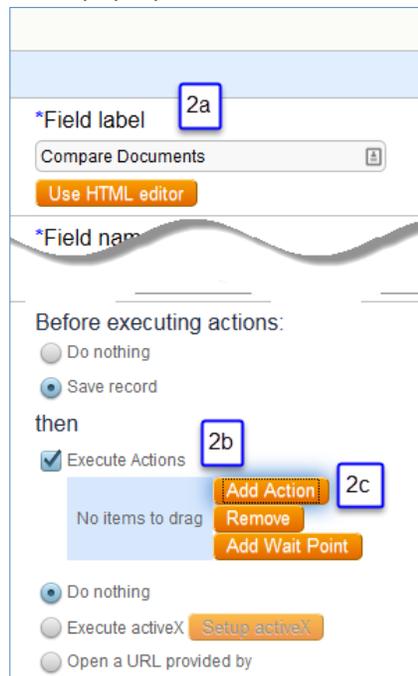
Prerequisites

To use redlining, you must be running Agiloft on a Microsoft server with MS Word installed **or** you must connect to the Hosted Services Word API and enable Word API services.

For setup instructions on connecting to the Hosted MS Word Services API, please consult our [Word API Setup](#) document.

Setting up Redlining

1. Log in to Agiloft as an admin and create three fields of type *File with versioning*: e.g. *Previous*, *Revised* and *Redlined* in the table where you wish to compare documents.
2. Create an *action button* on the same table as the three file fields:
 - a. On the **General** tab, name the action button (e.g., Compare Documents).
 - b. Select the **Execute Action** checkbox.
 - c. Click **Add Action**.
 - d. In the pop-up window, click **Create Document Comparison Action**.



3. Create the action as follows:
 - a. On the **General** tab, name the action (e.g., 'Compare Documents').
 - b. On the **Data Source** tab, select the fields that hold the **Revised File**, **Previous File**, and the field to hold the **Redlined** document.

The screenshot shows the 'Data Source' configuration window. It has two tabs: 'General' and 'Data Source'. At the top right are buttons for 'Back', 'Finish', and 'Cancel'. The main area is divided into three sections:

- Revised File:** Text: "Select the attached file field that contains the Revised version of the document in Word format. Please note that if the field permits multiple attached files, the comparison will run only on the most recently uploaded file." Dropdown: "Revised File" with a blue arrow pointing to it.
- Previous File:** Text: "Select the attached file field that contains the Previous or initial file for comparison in Word format. Please note that if the field permits multiple attached files, the comparison will run only on the most recently uploaded file." Dropdown: "Previous File" with a blue arrow pointing to it.
- Redlined File:** Text: "Select the target field for the redlined document. The field will be populated with a file that compares the Revised File with respect to the Previous File. If you select a Versioned file field, the Redlined file will be stored as the most recent version." Dropdown: "Redlined File" with a blue arrow pointing to it. Below the dropdown is a radio button labeled "Overwrite any files in this field".

The screenshot shows the 'Hosted Service' configuration section. It contains the following text:

The Hosted service option for MS Word Document Comparison is required if:
 1) Agiloft is installed on Linux / Unix systems
 2) Agiloft is installed on a Windows server which does not have MS Word and other pre-requisites installed.

Use Hosted Service to compare documents

Note: In order to use the hosted service, MS Word Services Extension should be deployed and configured correctly from Setup/Integration menu.

At the bottom are buttons for 'Back', 'Finish', and 'Cancel'. A blue arrow points up to the checked checkbox.

4. For customers accessing the Hosted Word API services for *redlining*, select the **Use Hosted Service to Compare Documents** checkbox.
5. **All users:** **Finish** the action. **Finish** setting up the action button and **Save** it. Continue organizing the layout and permissions as needed.

That's it, redlining is now enabled. To test out the feature, upload files into the **Revised** and **Previous** fields and click the **Compare Documents** action button you created.