Document Comparison in Word 2010
A NEW MICROSOFT OFFICE

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Published by TechnoLawyer
February 2011
DOCUMENT COMPARISON IN WORD 2010

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When Microsoft released Office 2007 in 2006, they provided users with a brand new interface: “Ribbons”. By replacing toolbars with ribbons, they presented a contextual interface that provided functionality based on the context in which the user is working. For example, if a user is working in a Word table, the commands associated with the features for tables are dynamically available via a ribbon. In older versions of Office (Office 2003 and older), table features were buried in a menu and a toolbar. In June 2010 Office 2010 was released, which contained some user interface improvements, but overall was very similar to Office 2007. Both versions saw significant improvements to both the user interface and the internal engine of Word’s Compare and Track Change features.

A HISTORY OF DOCUMENT COMPARISON

Tracked changes are known as redlines or redlining. Traditionally, some industries drew a vertical red line in the margin to show that some text had been changed.

The Word Track Change feature visually shows the changes made to a document. Tracked changes are used in two ways. First, they enable Word to track the revisions made to a document during editing, by allowing changes to be made to a document as they are typed without losing the original text. Second, when comparing two versions of a document the results are shown as tracked changes. In each of these cases, the revisions are distinguished by being a different color from the original text and can be easily reviewed, accepted or rejected.

In early versions of Word the document comparison operation was unreliable. When comparing two documents, the result document (produced through the Track Changes function) often fell short of meeting an attorney’s needs. Accuracy was inconsistent, for example whole paragraphs would be deleted when only a single word was removed. Comparing tables was problematic, as were comparing changes to text contained within fields such as Table of Contents and footnotes. The metadata contained within tracked changes, such as author, date and time information was also of concern, and document comparison was hard to use in Word because features were hidden and not easy to understand.

These types of problems caused many firms to purchase alternative document comparison applications.

A NEW DOCUMENT COMPARE EXPERIENCE

When the economic recession hit, many firms put their technology upgrade plans on hold. Not as large a number of firms upgraded their Office environments as expected. Now, as the economy improves, firms are starting to upgrade to Office 2010 in greater numbers than they did to Office 2007.

As firms prepare for this upgrade many are reevaluating their document comparison software. The questions asked are, “Why should we invest in outside technology for features already built into Word? Is Word ready to go it alone? Is our firm ready to go Native?”
We are seeing a paradigm shift. Whereas firms used to purchase outside applications to solve business problems in place of using Word’s tools, they are now looking at the native application to determine what they can do with the tools Word already has.

**QUESTION ONE: WHY SHOULD WE INVEST IN OUTSIDE TECHNOLOGY FOR FEATURES ALREADY BUILT INTO WORD?**

Investing in outside-the-application document automation products is expensive. By reducing the number of desktop applications firms can reduce costs significantly in a number of ways:

Reducing or eliminating license fees and support costs for third party applications. Internal support is reduced because there are fewer applications to support and upkeep.

Upgrade costs are reduced because there are fewer products to upgrade. Using Word’s native tools reduces training costs. Users are more often familiar with Word’s native features. By reducing the number of applications that users need to be trained on reduces the required training hours.

**QUESTION TWO: IS WORD READY TO GO IT ALONE?**

With the release of Word 2007 and 2010, Microsoft made significant changes to the Compare feature. These changes include four major areas of improvement: the **Review ribbon**, the **Compare dialog box**, the **accuracy** of the comparison engine and **improved author control**.

**Improvement 1. Review Ribbon Overview**

The Review tab is a big improvement over previous versions of Word. The buttons make more sense, and features that were buried in the old Word toolbar are more accessible.

The Review Tab is broken up into seven different groups. The last four, starting with the Tracking group, contain the Track Changes and Compare tools.

1. **The Tracking group** controls the way tracked changes are displayed (Figure 1):

![Figure 1](image)

   **Track Changes** button switches tracking on or off.

   **Display for Review** dropdown list provides different options for viewing the changes in a document. The four options can be confusing, so understanding each helps in deciding which one to use:

<table>
<thead>
<tr>
<th><strong>Final Show Markup</strong></th>
<th>Shows the final text with all tracked changes and comments displayed.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong> this is the default to prevent users from inadvertently distributing documents that contain tracked changes and comments.</td>
<td></td>
</tr>
</tbody>
</table>
**Final**

Shows the final version as if all tracked changes and comments have been accepted. *Note:* this view hides the tracked changes but they are still contained in the document.

**Original Showing Markup**

Shows the original text with tracked changes and comments.

**Original:**

Shows the original document without tracked changes and comments showing. *Note:* this view only hides the tracked changes. They are still contained in the document.

**Show Markup.** Dropdown list provides different options for which type of Mark-ups to display in the document (Figure 2). It can be set to display tracked changes by type of edit, such as insertions and deletions or by formatting changes or comments.

![Figure 2](image)

**Balloons.** Provides options for turning off balloons and displaying all comments and changes inline.

**Reviewers.** Provides the option to display only the changes made by the author or by a specific reviewer.

**Reviewing Pane.** Allows revisions to be shown in a separate windowpane which can be displayed vertically or horizontally.

II. The **Changes** group contains the Accept, Reject, Previous and Next buttons.

The **Accept** and **Reject** buttons (Figure 3): provide options for accepting or rejecting the current revision and moving to the next.

![Figure 3](image)

The **Previous** and **Next** buttons navigate to the previous or next revision.

III. The new **Compare** button (Figure 4) provides access to the Compare or Combine dialog boxes and the **Show Source Documents** button.
**Figure 4**

**Compare or Combine?**

**Compare** – allows the comparison of two versions of a single document. If a document is sent to a single reviewer and only that reviewer was making changes, use this feature to compare the two documents (the Compare Documents dialog box settings are discussed in greater detail in the section starting “Improvement Two – Word’s Compare Documents Dialog box”).

**Combine** - when a document has been reviewed and edited by multiple people, use combine to display the differences between documents and to see exactly who changed what.

**Show Source Documents** - allows users to choose which source documents to show, the original document, the revised document or both in a Tri-view.

IV. The Protect Group consists of the Block Authors and Restrict Editing buttons.

<table>
<thead>
<tr>
<th><strong>Block Authors:</strong></th>
<th><strong>Restrict Editing:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Is new to Word 2010 and available only when the document is saved to a MS SharePoint Workspace environment, for example: MS Office Live.</td>
<td>This feature allows the user to restrict the type of editing people can make to the document by protecting it with a password. For example, formatting changes may be restricted and only Tracked Changes allowed in a document.</td>
</tr>
</tbody>
</table>
**Improvement 2.  Word’s Compare Documents Dialog Box**

In previous versions of Word, there was no comparison dialog box for comparing two documents, and using the comparison feature was a complex exercise. The new dialog box (Figure 5) is more accessible, easy to understand and is on par with stand-alone comparison products. The dialog box allows users to control different comparison elements, such as not comparing footnotes and moves, thereby setting the comparison granularity.

![Figure 5]

More >> What do the check boxes all mean?

**Comparison Settings:**

By default all check boxes are checked. This means that Word will show every possible change between two versions of a document. To only compare the changes in certain elements of a document, or to reduce the granularity of the comparison, selections can be changed here. For example, the formatting changes in a document may not change the meaning of the document. By unchecking “Formatting” and “Case Changes,” those changes will not be marked.

**Show Changes** settings:

In addition to accuracy, Word added two levels of comparison granularity.

<table>
<thead>
<tr>
<th><strong>Character Level</strong></th>
<th>A character-level change occurs when changes are made to a few characters of a word, such as a case change.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Word Level</strong></td>
<td>At the word level, the entire word is shown as a revision.</td>
</tr>
</tbody>
</table>

*Note:* It is often easier to work at the word level when dealing with changes such as *you* and *your*. Word shows the change as a word change instead of the single “r” as inserted. In previous versions of Word, this was not possible.

**Show Changes in:**

<table>
<thead>
<tr>
<th><strong>Original document</strong></th>
<th>The first document selected will be marked-up.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revised document</strong></td>
<td>The second document selected will be marked-up.</td>
</tr>
</tbody>
</table>
Improvement 3. Author Control

The result document from a comparison will be a Track Changes document with the revision author, date and time embedded in each revision. Word has now made it possible to control the user name and the revision author by allowing the user to change the *Label changes with value* (Error! Reference source not found.). In previous versions of Word, this was not possible.

Improvement 4. Accuracy

In Word 2010, Microsoft has significantly improved the accuracy of its comparison engine. The accuracy is so greatly improved that it appears to me, as a developer, that Microsoft completely rewrote this part of Word. This change alone, in my opinion, is the most significant improvement to Microsoft Word.

**QUESTION 3 – IS YOUR FIRM READY TO GO NATIVE?**

Although there are many improvements in Word’s document compare, each firm must closely consider the pros and cons as it pertains to their users’ workflow when considering making a switch. Here are some Pros and Cons to consider:

I. Some Pros:

The reduced cost and lower maintenance cost of eliminating a third party, separate from Word application and reducing the applications on the user desktop.

Customer demand and workflow - As firms collaborate with clients more via electronic documents, the reality is that many firms are already working with Microsoft Word Track Changes because their clients are already using this feature. Clients typically don’t have the third party tools that law firms use for comparing versions of documents, so they demand documents with tracked changes be provided to them. These are organic, functioning, re usable documents that fit right in to the workflow of a law firm.

Encouraging Word best practices - By using Word for document comparison, firms are teaching and encouraging Word best practices, which in turn will help the overall document health of the firm’s work product. Properly created and formatted documents are less likely to be problematic documents, thereby reducing man hours spent cleaning up and reformatting documents.

II. Some Cons:

Although Word is greatly improved for document comparison, there are still features that are not available. Many firms may be reluctant to go without their “outside application” regardless of the cost benefit of using Word exclusively. Below is a list of those shortcomings that have to be considered before switching to Word exclusively:

- **DMS integration.** Word does not provide built-in document management integration for document comparison.
- **Track change options fidelity.** Tracked changes are user-specific and not document-specific. In other words, how a result document appears on one user’s machine may look completely different on another’s. This can make collaboration between two parties difficult. To overcome this, the tracking options on both machines have to be the same.

- **Reporting features.** Word falls short on the ability to create revision statistics for the result document.

- **Different comparison schemes.** There is no way for firms to save and use different comparison schemes. Schemes provide different settings for comparison elements and the “look and feel” for deleted, inserted, formatted and moved revisions.

- **Handling legacy result documents.** If a firm decides to use Word as its exclusive document comparison platform, all the result documents from the previous comparison product are frozen and repurposing is nearly impossible.

- **Email result, original and revised.** Word can only e-mail the active document through its “Send” command.

- **Print revised pages.** Word cannot selectively print the pages that contain revisions.

**OUR ADVICE?**

Gradual change may be the solution. As customer demand grows, as we believe it will for native Word Compare, firms should consider moving to the native Word tools gradually. By maintaining some licenses of their current third party application, they can transition users to the new paradigm and reduce some of the pain felt by users tied to a previous approach. Employing a variety of training tools can help users become more comfortable with the new approach making the firms less reliant on the old tools and moving them closer to being able to switch all users to native Word for document comparison.

Look for a product such as iRedline that supports the native approach and eases the transition for users.

If a firm is already using native Word for document comparison, look for products that can enhance the user experience.

**iRedline- The Solution**

iRedline was designed to improve Word Compare. The iRedline design approach uses our philosophy of Enhanced Native Architecture®, to work harmoniously within Word to improve what’s there, and provide what isn’t.

iRedline makes the Word solution even more powerful by providing additional tools and flexibility. iRedline consolidates menus and provides shortcuts to frequently used and hard to find features. It fixes broken features and adds those missing in native Word and crucial for attorneys and law firms.

iRedline adds Key features to Word’s Compare such as:
Complete Document Management System integration (DMS). Right click and compare, and Save As options

Result documents are pure Word Track Changes documents for further collaboration

Quick access to Track Changes and Compare features in Microsoft Word

Tools that proactively manage the metadata historically associated with Word Track Changes

Create reports and change lists for revised documents

Work with result documents from third party applications such as DeltaView, and convert them to Word Track Change documents

Lock a result document from further edits using Metasealant

Tag Text to ignore during comparison

CONCLUSION

Word 2010 provides firms with a viable option to lower their desktop software costs by foregoing the investment in outside-the-application document comparison products. Word 2010 now provides many features that were either poorly designed or absent in previous versions.

Before a firm decides to use Word 2010 as its exclusive document comparison platform, it must inventory those features that the firm has come to expect and depend upon and decide if now the time to give them up is.

Randall Farrar is the President of Esquire Innovations, Inc. Esquire Innovations develops document automation software for the legal industry. iRedline is a document comparison add-on that works inside of Word to provide DMS integration, reporting and other features. He can be reached at randall.farrar@esqinc.com or www.esqinc.com.