

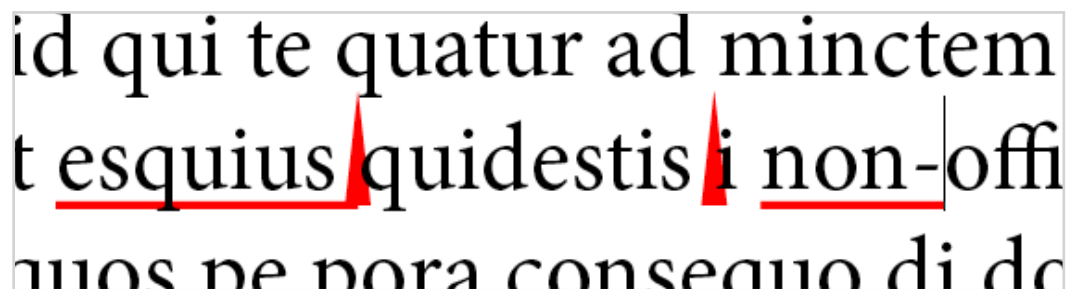
## Understanding TrackChanges

Updated May 13th, 2016

This document is designed to help CtrlPrint users understand how the extra function TrackChanges works. It is intended for all users and its aim is to help reduce potential issues.

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## 1. What is TrackChanges?

TrackChanges is an extra function that can be used with CtrlPrint to show where, when, and by whom text changes have been made in a document. The image above shows how text appears in InCopy (and InDesign) when using “layout” view. The underlined text indicates where text has been added, the carets (or triangles) indicate where text has been deleted.

TrackChanges also includes these markups in PDFs created with the system and offers a palette in InCopy and InDesign that allows users additional functionality for filtering and displaying changes. TrackChanges is activated for entire projects (not individual chapters.)

## 2. How do I activate TrackChanges?

Because TrackChanges is an extra function that is by default turned off it needs to be activated by someone at CtrlPrint. If you need TrackChanges activated please contact us by email or phone.


*Note that you must create the project and at least one chapter within that project before we are able to activate TrackChanges.*

## 3. How can I tell if TrackChanges is activated?

If you are unsure if TrackChanges is activated for a project you can find out by using the “Overview” page when logged in to CtrlPrint. Simply select the project from the column found on the left side of the window and you will come to a page displaying a list of chapters that also indicates which extra functions are active or not.


**Demo Company - ANNUAL REPORT DEMO - Overview**

**Extra services that can be activated:**



**TrackChanges**  
Visually track changes in a CtrlPrint project and see when, and by whom, they were made.

**ACTIVE** Learn more [here](#).



**Export for Word**  
Easily create a Word compatible file (.rtf) from documents that are part of a CtrlPrint project.

**ACTIVE** Learn more [here](#).

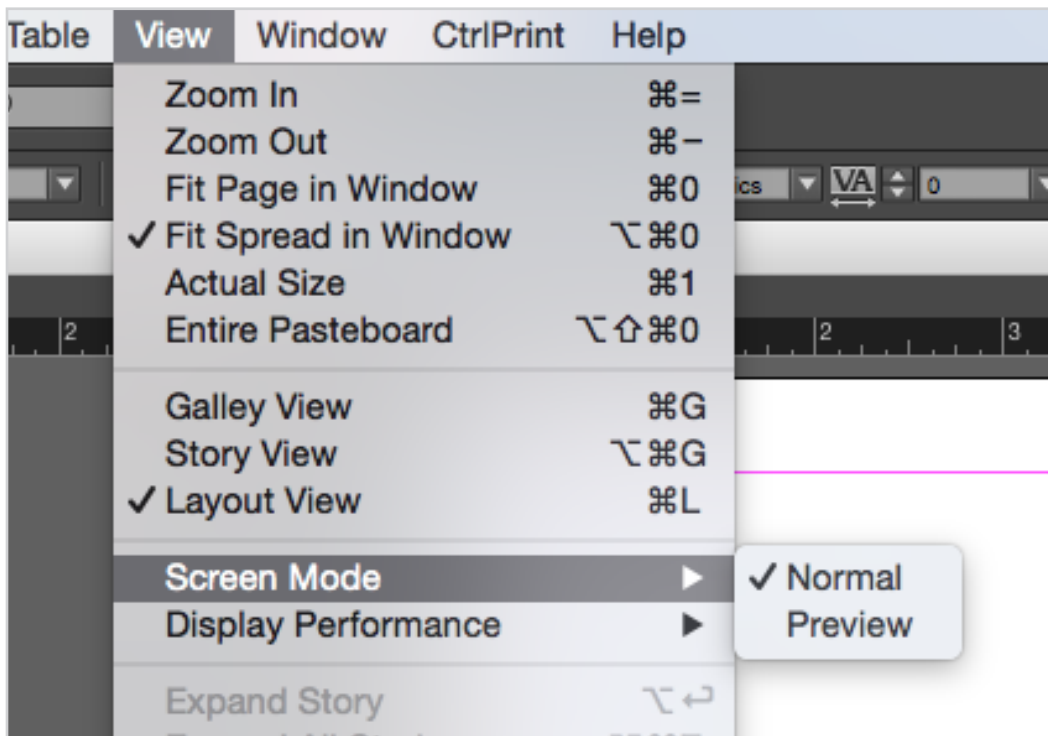
  

Chapter	Version	Date created	
▶ <a href="#">Cover</a>	3	Dec 7, 2015 7:29 PM	Fi
▶ <a href="#">VD Letter-Strategy-About</a>	189	May 10, 2016 11:24 AM	Al
▶ <a href="#">Business Areas</a>	18	Feb 25, 2016 2:03 PM	Al
▶ <a href="#">Accounts</a>	39	May 10, 2016 10:24 AM	Al
▶ <a href="#">Accounts 2</a>	3	Sep 18, 2015 8:47 AM	Fi
▶ <a href="#">Corporate Governance</a>	3	Dec 1, 2015 9:41 AM	M
▶ <a href="#">Sustainability</a>	1	Aug 26, 2015 9:42 AM	Al

*On the “Overview” page you can see which extra services are active, including TrackChanges.*

## 4. Why can't I see my changes in InCopy even though TrackChanges is active?

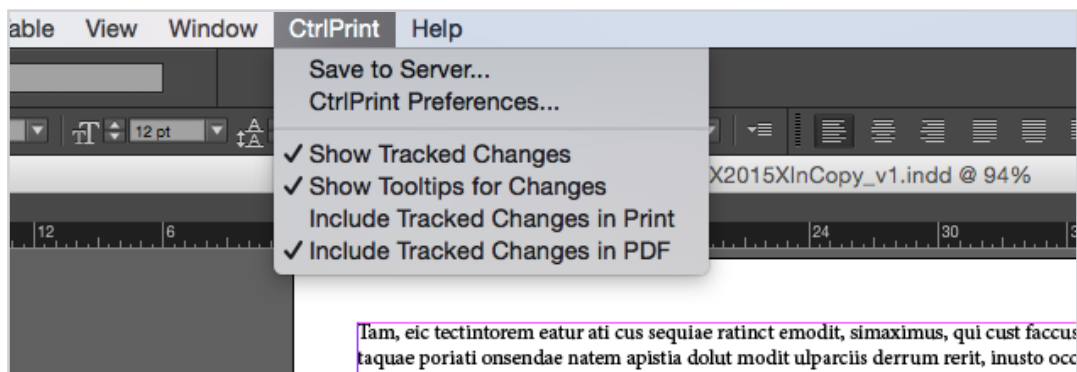
Make sure you are using what is called “Normal” screen mode instead of “Preview”. (“Preview” shows how the document looks with no markups - including TrackChanges.) This option is found under the “View” menu:



Make sure your “Screen Mode” is set to “Normal” in InCopy if you cannot see your changes being tracked.

## 5. What options do I have when using TrackChanges, can I hide the changes without accepting them?

Under the “CtrlPrint” menu (in both Adobe InCopy and InDesign) you can see which options you have when using TrackChanges. Note that changes will still be tracked in the background regardless if you choose to display them or not.



*Under the “CtrlPrint” menu in InCopy and InDesign you will find the TrackChanges preferences.*

### Here you can choose to:

- Show or hide the changes in layout view.
- Show or hide the tooltips when you hover over a change (doing so allows you to see a small popup that tells you who made the change and when).
- Include the markups when you print the document.
- Include the markups in PDFs created from InDesign or InCopy. (This does not affect PDFs which are uploaded to CtrlPrint when you choose “Save to server”.)

## 6. What changes does TrackChanges show?

TrackChanges shows all **text changes** made since a document was added to CtrlPrint up until the point where those changes are accepted. This means that if a document was used in CtrlPrint in previous years those changes will still be present in the document if you reuse it without first accepting the changes. This also means that even if TrackChanges is not yet active changes will still be tracked – as long as the document has been added to CtrlPrint.

### What isn't tracked?

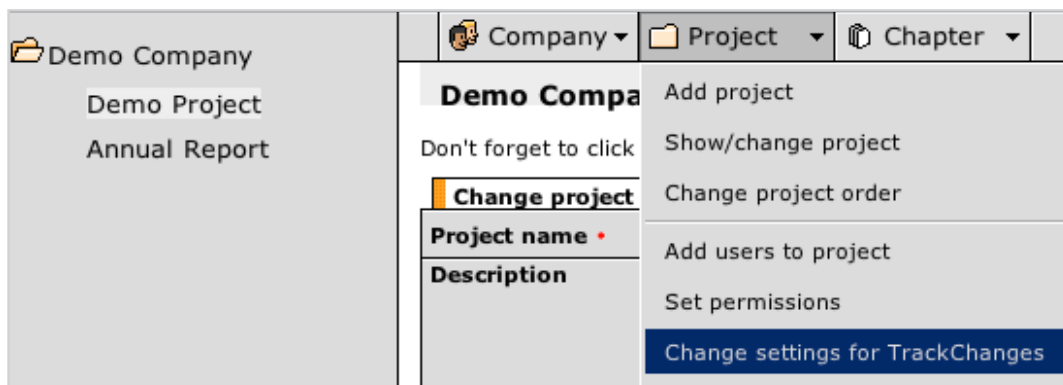
**Because the changes tracked are limited to actual text changes you will not see any indication of a change related to:**

- Changes made to the typeface - such as fonts, font sizes, font colors, etc.
- Changes made to images or graphs
- The addition, movement or removal of text frames – removing a text frame will also remove the changes associated with the text found within it
- Changes to specific styles - such as bullet points

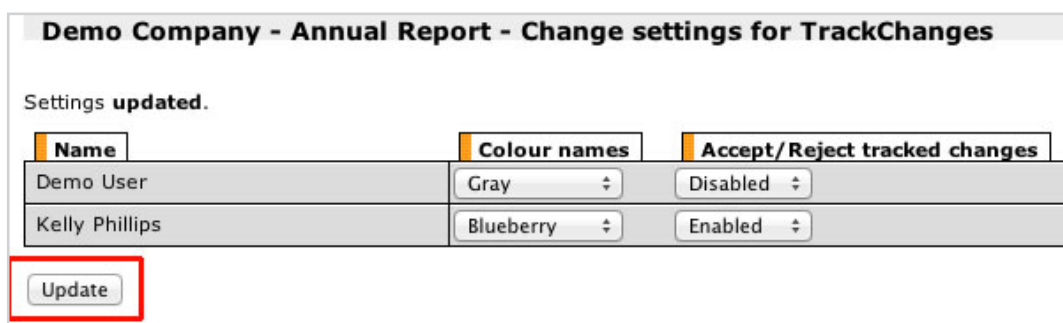
## 7. Why can't I accept or reject changes – or how do I give users the ability to do so?

Because not all users need to be able to accept the changes in documents this option is not activated by default. To set which users can accept changes an administrator for the project needs to change their permission settings for TrackChanges. This is found under the "Project" menu (when logged in as an administrator) using the option called "Change settings for TrackChanges".

*Contact your project administrator if you need to be able to accept changes.*



*Log in as an administrator and select the company, then choose "Change settings for TrackChanges".*

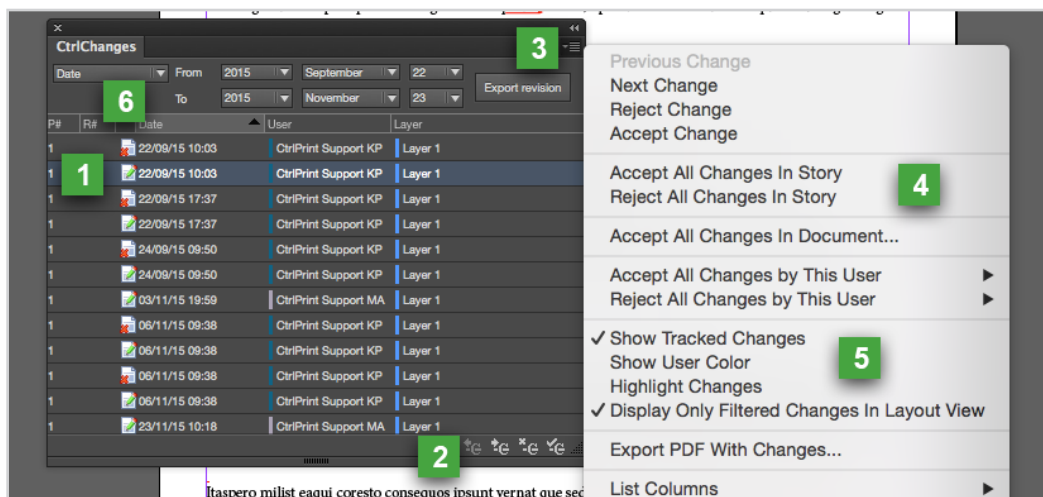


*Set which users should have the ability to accept changes and click the "Update" button.*

More information about this can be found on our support site [here](#).

## 8. How do I use the CtrlChanges palette?

The CtrlChanges palette (found under the “Window” menu) allows you to interact with the changes in InCopy and InDesign, determining which should be shown, which should be accepted or rejected as well as how they are displayed. Below is an overview:



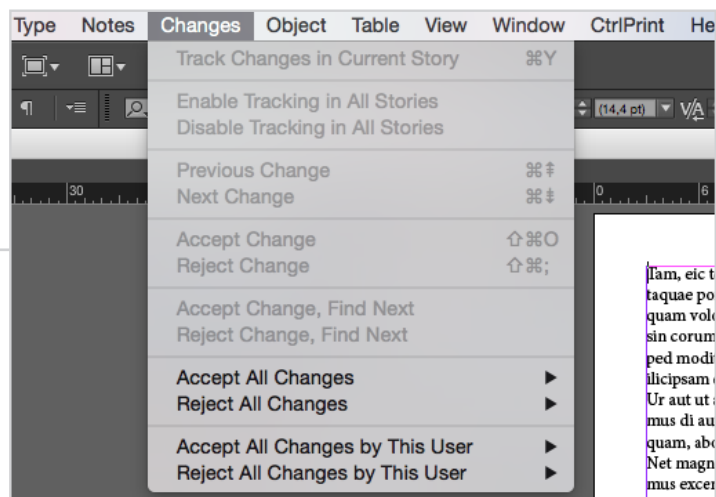
1. You can select individual (and multiple) changes to accept or reject on the palette. Double clicking on a change will take you to where that change is in the document. You can also sort the changes by date, user and page. Added text is indicated with a green pencil icon, deleted text is indicated with a red x icon.
2. Use the buttons on the bottom right corner to hop to the next (or previous) change as well as to reject or accept that change.
3. In the top right corner is an additional menu which can be displayed, click here for further options (indicated by numbers 4 and 5.)
4. Here you can accept or reject ALL the changes in the story (the text frame you have your cursor in) or ALL the changes in the document. Note that this can also be used to accept changes in documents no longer in CtrlPrint. See number 3 on the page here if you need to accept changes before adding a document to CtrlPrint.
5. Additional options allow you to show the user colors (each user has a color assigned to them, these can be seen beside their name in the palette) instead of the default red markups, as well as highlight changes by displaying them with a solid colored background making them easier to see - note that the highlighting will be the default red if you do not also choose to show the user colors.
6. A filter is available at the top of the palette which allows you to display changes made between two dates or by a specific user. You can then create a PDF with these markups by using the “Export” option under the “File” menu. More information about using the filter can be found at the bottom of the page here.



## 9. I can't accept changes even though I have permission to do so, am I doing something wrong?

Make sure that you're **not** using InCopy's function called Track Changes under the "Changes" menu. Because these functions are part of our TrackChanges many of the options here will not be available.

*The "Changes" menu in InCopy is different than the "CtrlChanges" palette and many options will be unavailable.*



## 10. How do I download a PDF without TrackChanges?

When TrackChanges is activated an additional PDF preset called "TrackChanges" is automatically added to the project. When a chapter is uploaded to the server this additional PDF will also be created. Information about where and how you can download clean PDFs without TrackChanges can be found on the page about PDFs found on our support site [here](http://support.ctrlprint.net).

For more help with TrackChanges please see the list of articles on our support site found on the page [here](#).