

Document Actions

Agiloft supports the following document actions to help manage Microsoft Word files, version 2010 or higher, and PDF files:

- **Convert Document Format Action:** Converts a Microsoft Word document to PDF or a PDF to Microsoft Word format. Converting a document to PDF is often useful to restrict the editing of a document, and converting to Microsoft Word format is often useful to facilitate editing.
- **Document Comparison Action:** Compares two versions of a Microsoft Word document to produce a third version that indicates differences between the two documents. For instance, if you send a document to an external party for review, you can run this action to compare the edited version they return with the original version.
- **Merge Document Action:** Merges multiple Microsoft Word or PDF files into one document, as well as converts Word files to PDF. If a parent record has many related records with supporting documents, this action can be useful if you want to combine all the supporting documents into a single file in the parent record.
- **OCR Action:** Converts PDF files that have scanned or photographed images of text into files that contain machine-encoded text. For instance, if you have a large file that would benefit from being searchable, this action can create a file that allows users to search the text.
- **Print Action:** Generates a PDF or Word document from a print template. Print actions are often used to create a document from a record and then share it with someone or send it via email.

Having Microsoft Word software that is accessible by Agiloft is a prerequisite for successfully using document actions on Microsoft Word files. This can be accomplished either through enabling [Microsoft Word Services Integration](#) or installing Agiloft on a Windows server with the required software.