Impress Colleagues with 'Tracked Editing'

With the information in this article you can:
- Make the most of Word's ability to track the changes in your documents
- Be sure that you have a complete history of the edits performed on each document
- Learn how ten people can all edit the same document – without it leading to confusion!

Track Changes and Word's other reviewing features are excellent tools for structuring the way in which you work with others. There was a time when this type of collaborative word processing was limited to the workplace. These days, every area of our life has been touched by new technology. If you belong to a club, society or sports team, it is almost certain that your minutes, reports and correspondence are written using Microsoft Word. It is equally likely that you pass drafts between individuals, with each person adding his or her personal contribution. This article will provide you with enough knowledge about Word's Track Changes to create edited documents that can be distributed effectively in a shared working environment. When you have tried out the ideas presented here, you will be able to impress your friends and colleagues with your new-found editing abilities. Just be careful that you don't impress them too much, they might put you in charge of coordinating the next newsletter!

Dr Steve North:

"In the days when collaborative software features were less common, I can remember regularly wasting hours trying to work out who had added what to each shared document. When you understand how Word handles document changes, it will add a whole new dimension to your shared projects."

Track the Changes in Shared Documents

Word versions 97/2000/2002/2003 all provide the Track Changes facility. There are only two main areas where the features differ:

- Word 2003 features both restrictive editing and formatting. Word 97/2000/2002 only allows an author to permit or forbid collaborators to make changes to the entire document. In Word 2003 it is possible for the author to specify varying levels of content and format modification privilege for each collaborator. For example, you might allow a friend to only edit a section that relates to his or her activities but not to change any other content, or the overall formatting of the Word document.

- Word's Reviewing toolbar was only introduced from Word 2000 onwards and, as we will see later this is a very useful feature.
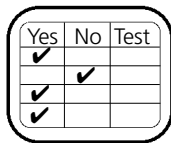
These variances are summarised in the table below. Where the differences between Word versions have an impact on the use of Track Changes, this will be indicated during the course of this article.

Track Changes features present	Word version			
	97 (8.0)	2000 (9.0)	2002 (10.0/XP)	2003 (11.0)
Restrictive editing and formatting	No	No	No	Yes
The Reviewing toolbar	No	Yes	Yes	Yes

Turn on the Reviewing toolbar

In Word 2000/2002/2003 (not 97), the Reviewing toolbar provides rapid access to important Track Changes functions:

1. Start Word and open your document.
2. Click on View > Toolbars > Reviewing.

The Reviewing toolbar should include all of the icons in the table below. If any are not present, or you would like to remove icons that you don't use, proceed as follows in Word 2000/2002/2003 (not 97):

1. Click on the small down arrow at the right-hand end of the **Reviewing** toolbar.
2. Click on **Add or Remove Buttons**.
3. Tick or un-tick the displayed icons as required.
4. Click anywhere off the toolbar to hide it.

As Word 97 does not have the Reviewing toolbar, many of the functions described in this article require separate instructions for Word 97.

The following table shows some of the most commonly used Reviewing toolbar icons:

| Function	Toolbar Icon	Description	Word version
Previous Change		Shows the previous change/comment in the text.	2000 2002 2003
Next Change		Shows the next change/comment in the text.	2000 2002 2003
Accept Change		Accepts a change permanently.	2000 2002 2003
Reject Change/ Delete Comment		Rejects a change and deletes the selected comment.	2000 2002 2003
Insert Comment		Adds a comment to the selected area.	2000 2002 2003
Highlight		Accesses the text highlighting tool.	2000 2002 2003

Function	Toolbar Icon	Description	Word version
Track Changes		Enables and disables the *Track Changes* feature.	2000 2002 2003
Reviewing Pane		Shows and hides the *Reviewing* pane.	2002 2003
Display for Review	Original Showing Markup ▾	Specifies the document view.	2002 2003
Show	Show ▾	Specifies the editing features to be displayed.	2002 2003

Turn on Track Changes

Word can record changes even when they are not shown on-screen.

It is important to understand that Word makes a distinction between *tracking* changes and *displaying* the changes to the user. You may choose to edit your document with previous deletions and changes visible on-screen (see screenshot below). The instructions for enabling this can be found on the next page. However, many users find a document less confusing with the changes not shown. This also helps with accurate formatting and layout.

Deleted text appears with a line through it.

| This is an example of the replacement text. This is an example of the original text.
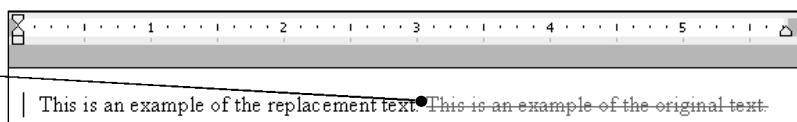
*Word with* **Highlight changes on screen** *enabled*

To enable Track Changes in all versions of Word:

1. Start Word and open your document.
2. Double-click the **TRK** text in the status bar at the bottom of the screen. If **TRK** is black, Word is tracking changes.

When TRK is highlighted in the status bar this means that all changes are being recorded. As previously indicated, the

activation of Track Changes does not necessarily mean that you will actually see the edits on-screen.
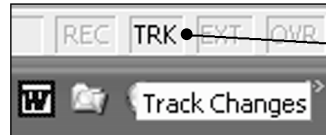
The TRK on Word's status bar is both an indicator and a button

Your comments and edits will be attributed to the name set in your copy of Word. To check this setting in Word 97/2000/2002/2003:

Use your preferred name for edits.

1. Start Word and open your document.
2. Click on **Tools** > **Options** > **User Information**.
3. Confirm that your name and initials (important for comments) appear as required in the appropriate fields.

View changes on-screen

To display the edits that are being recorded by Track Changes in Word 97/2000:

1. Start Word and open your document.
2. Click on **Tools** > **Track Changes** > **Highlight Changes**.
3. Tick **Highlight changes on screen**.

In Word 2002/2003:

1. Start Word and open your document.
2. If the **Reviewing** toolbar is not present, click on **View** > **Toolbars** > **Reviewing**.
3. On the **Reviewing** toolbar, click on the **Display for Review** down arrow > **Final Showing Markup**.

Control your collaborators' ability to modify the Track Changes settings

As described (and shown in the table) on page W 32/2, Word

2003 introduces the ability to restrict the editing and formatting privileges for each of your collaborators. In Word 97/2000/2002 users can only be prevented from modifying the status of Track Changes, as follows:

1. Start Word and open your document.

2. Set Track Changes to on or off (depending on whether you want the edits of all collaborators to be tracked or not). This is achieved by double-clicking on the **TRK** text in the status bar at the bottom of the screen. If **TRK** is black, Word is tracking changes. Once set, your collaborators will not be able to modify your setting for Track Changes.

3. Click on **Tools** > **Protect Document**.

4. Select **Tracked changes** and/or **Comments**, as appropriate.

5. Type a password in the **Password** text field, and click **OK**.

6. Re-type your password, and click **OK**.

7. Click on **File** > **Save**.

Word 2003 allows the author to specify exactly what each user can change in a document:

1. Start Word and open your document.

2. Set Track Changes to on or off (depending on whether you want the edits of all collaborators to be tracked or not). This is achieved by double-clicking on the **TRK** text in the status bar at the bottom of the screen. If **TRK** is black, Word is tracking changes. Once set, your collaborators will not be able to modify your setting for Track Changes.

3. Click on **Tools** > **Protect Document**.

4. The **Protect Document** task pane will open and display a three-stage wizard. Use the **Settings** option under **Formatting restrictions** to limit collaborators to certain styles (if required).

5. Under **Editing restrictions**, tick the box **Allow only this type of editing in the document.**

6. From the **Editing restrictions** drop-down menu select **Track changes**. This will record all changes but won't allow anyone except the author to review changes.

7. Under **groups** tick **Everyone** to allow the same permissions for all users or click on **More users** to specify different levels of access for each user.

8. Under **Start Enforcement**, click on **Yes, Start Enforcing Protection.**

9. When the **Start enforcing protection** dialogue opens, you have the option to add a password in the **Enter new password (optional)** text box.

10. Click on **File > Save.**

Review Document Changes Made by Others

If you have just received a document back from one or more collaborators, you will be itching to review the changes that they have made.

Stepping through changes

The following instructions will allow you to step through each change and decide whether to accept or reject it.

Word 97

1. Start Word and open your document.

2. Click somewhere on the document at the top of page one (to start searching from the beginning of the document).

3. Click on **Tools > Track Changes > Accept or Reject Changes.**

4. In the **Accept or Reject Changes** screen, click on the **Find** button with the right-facing arrow.

Stepping through changes will move the cursor to the relevant text section.

Word 2000/2002/2003

1. Start Word and open your document.

2. If the **Reviewing** toolbar is not present, click on **View > Toolbars > Reviewing**.

3. Click somewhere on the document at the top of page one.

4. On the **Reviewing** toolbar, click **Next Change**.

You will need to have the changes visible on-screen, as previously described.

Accepting or rejecting individual changes

For each change, you will need to decide whether to accept or reject it. The steps on this page follow directly on from the Stepping through changes instructions on page W 32/7.

Word 97

1. Make a decision about an individual change.

2. In the **Accept or Reject Changes** screen, click either **Accept** or **Reject**.

Word 2000/2002/2003

1. Make a decision about an individual change.

2. On the **Reviewing** toolbar, click either **Accept Change** or **Reject Change**.

Accepting or rejecting all changes

If you have made a decision that applies to all of the changes in a document, save time by performing one operation.

Word 97

1. Make a decision about all changes.

2. In the **Accept or Reject Changes** screen, click either **Accept All** or **Reject All**.

Word 2000/2002/2003

1. Make a decision about all changes.

2. On the **Reviewing** toolbar, hover over either the **Accept Change** button or the **Reject Change** button. Click on the arrow to the right of the button.

3. Click on **Accept all Changes in Document** or **Reject all Changes in Document**, as appropriate.

Reinstating the Accept or Reject Changes screen in later Word versions

Word versions 2002/2003 do not include the **Accept or Reject Changes** screen found in Word 97/2000. Although this feature is not installed by default, it may be added to Word 2002/2003 as follows:

1. Start Word and open your document.

2. If the **Reviewing** toolbar is not present, click on **View > Toolbars > Reviewing**.

3. Click on **Tools > Customize > Commands**.

4. Under **Categories**, select **All Commands**.

5. Under **Commands**, select **ToolsReviewRevisions**.

6. Drag **ToolsReviewRevisions** to a location on the **Reviewing** toolbar. You should now have a button named **Accept or Reject Changes** on the **Reviewing** toolbar.

7. Click **Close** to exit the**Customize** screen.

Adding comments

Collaborators can add their comments to any document in Word 97/2000/2002/2003:

1. Start Word and open your document.

2. Use the mouse to select a word, phrase or image that you wish to comment on.

3. Click on **Insert > Comment**.

4. The **Comments view pane** (Word 97/2000) or **Reviewing Pane** (Word 2002/2003) opens at the bottom of the screen.

5. Type your comment next to your initials. Note: In Word 97/2000 the **Comments view pane** can be accessed at any time by clicking on **View > Comments**.

The **Accept or Reject Changes** screen is not installed by default in Word 2002/2003.

> In Word 2002/2003 click on the **Reviewing Pane** button on the **Reviewing** toolbar to launch the **Reviewing pane**.

Please note that if you hover your mouse over a highlighted comment, you can read it as a Tool Tip.

Tips & Troubleshooting for Shared Documents

The following may prove very useful when you start to explore the exciting possibilities of collaborative working with Word.

How to print changes made to your Word document

There are times when you will want to print the modifications that have been made to your document. In Word 97/2000, this is achieved as follows:

1. Start Word and open your document.
2. Click on **Tools > Track Changes**.
3. Tick the **Track changes while editing** box.
4. Tick the **Highlight changes in printed document** box.

In Word 2002/2003:

1. Start Word and open your document.
2. Click on **File > Print**.
3. From the **Print What** drop-down menu select **List of Markup**.

Find out who changed what

Word randomly allocates a colour for each author.

If several authors have edited a document, it can be useful to find out which author added each change. Proceed as follows (Word 97/2000/2002/2003):

1. Start Word and open your document.
2. With the changes set to visible (see earlier in article), hover over the edit in the document. A Microsoft

> Tool Tip (sometimes called a balloon) will appear that shows the name of the author.

Check that your changes are correctly attributed

Remember to make sure that you have correctly set your User Information, so that your changes and comments are correctly attributed (see page W 32/5).
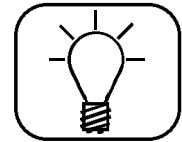
What to do if you accidentally accept or reject a change

When reviewing changes, if you unintentionally click on the wrong button (accept instead of reject, or vice versa) it is possible to cancel the action as follows:

Word 97/2000/2002/2003

1. In Word, click on **Edit** > **Undo Change Accept** (or **Reject**).

View the changes made by individual authors

In Word 2002/2003, it is possible to display only the changes made by a specific author:

1. Start Word and open your document.
2. If the **Reviewing** toolbar is not present, click on **View** > **Toolbars** > **Reviewing**.
3. On the **Reviewing** toolbar click on **Show** > **Reviewers**.
4. Tick or un-tick names from the list of authors.

Track Changes may interfere with automatic numbering

If you are using Track Changes with Word's automatic numbering feature (for paragraphs or a list), you may find that the sequence appears to be incorrect. This is because Word does not actually delete any content until changes are accepted or rejected. The numbers should be restored as soon as you perform one of these actions. If the numbering remains fragmented:

When Track Changes is enabled, Word keeps all deleted text, whether this is shown on-screen or not.

1. Press (Ctrl) + (A) to select the entire document.
2. Press (F8) to update all automated fields.

Does this document contain any tracked changes?

If you are trying to check whether the current document contains tracked changes, proceed as follows:

Word 97

1. Start Word and open your document.
2. Click somewhere on the document at the top of page one.
3. Click on **Tools > Track Changes > Accept or Reject Changes**.
4. In the **Accept or Reject Changes** screen, click on the **Find** button with the right-facing arrow.
5. If a change is found, the cursor and screen view will jump to it in the text.

Word 2000/2002/2003

1. Start Word and open your document.
2. If the **Reviewing** toolbar is not present, click on **View > Toolbars > Reviewing**.
3. Click somewhere on the document at the top of page one.
4. On the **Reviewing** toolbar click on **Next Change**.
5. If a change is found, the cursor and screen view will jump to it in the text.
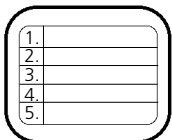
That's it. You are now fully prepared to turn loose your Word editorial skills on some poor unsuspecting publication. Whether it's a local newsletter or the great novel of the 21st century, I hope you enjoy it.