

## Class Outline

### **I. Getting Started**

- A. *Set User Information*
- B. *Display the Reviewing Toolbar*
- C. *Set Track Changes Options*
- D. *Open Original Document and Save*

### **II. Editing the Document**

- A. *Turn on Revision Tracking*
- B. *Make Changes to the Document*
- C. *Add, Change, Delete Comments*

### **III. Compare and Merge Documents**

- *Merge Changes from Others into your Document*

### **IV. Print the Document**

- A. *Print Document with Markup*
- B. *Print Markup List*

### **V. Review Document Changes**

- A. *Accept Changes*
- B. *Reject Changes/Delete Comments*

# **Microsoft Word – Tracking Changes**

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## **Track changes while you edit**

1. Open the document you want to revise.
2. On the **Tools** menu, click **Track Changes**.

When the Track Changes feature is enabled, **TRK** appears on the status bar (status bar: A horizontal bar at the bottom of the screen that displays information about the current condition of the program, such as the status of items in the window, the progress of the current task, or information about the selected item.) at the bottom of your document. When you turn off change tracking, **TRK** is dimmed.

3. Make the changes you want by inserting, deleting, or moving text or graphics. You can also change formatting.

### **Notes:**

- You can change the color and other formatting that Word uses to mark changed text and graphics.
- If you use change tracking and then save your document as a Web page, tracked changes will appear on your Web page.

# ***Microsoft Word – Tracking Changes***

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## **Insert a comment**

1. Select the text or item you want to comment (comment: A note or annotation that an author or reviewer adds to a document. Microsoft Word displays the comment in a balloon in the margin of the document or in the Reviewing Pane.) on, or click at the end of the text.
2. On the **Insert** menu, click **Comment**.
3. Type the comment text in the comment balloon (balloons: In print layout view or Web layout view, markup balloons show markup elements, such as comments and tracked changes, in the margins of your document. Use these balloons to easily see and respond to reviewers' changes and comments.).

### **Notes:**

- If the comment balloons are hidden, you can type the comment in the **Reviewing Pane**.
- You can rest the insertion point over the balloon to display the name of the reviewer.
- To respond to a comment, click in the comment you want to respond to, and then click **Comment** on the **Insert** menu. Type your response in the new comment balloon.

## **Modify a comment**

If the comments aren't visible on the screen, click **Markup** on the **View** menu.

1. Click inside the balloon for the comment you want to edit.
2. Modify the text as appropriate.

## **Delete a comment**

- To quickly delete a single comment, right-click the comment, and then click **Delete Comment**.

# Microsoft Word – Tracking Changes

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## Compare and merge documents

This procedure would be used by anyone wanting to merge changes and comments made by specific reviewer(s) into one document.

1. Open the edited copy of the document.
2. On the **Tools** menu, click **Compare and Merge Documents**.
3. Select the original document, click the arrow next to **Merge**, and then do one of the following:
  - To display the results of the comparison in the original document, click **Merge**.
  - To display the results in the currently open document, click **Merge into current document**.
  - To display the results in a new document, click **Merge into new document**.

### **Notes:**

- To ensure the best possible merge results, make sure that the **Store random number to improve merge accuracy** check box is selected on the **Security** tab of the **Options** dialog box (click **Options** on the **Tools** menu).
- If you've used the **Versions** command on the **File** menu to save multiple versions of the document in one file, and you want to compare the current version with an earlier one, you must first save the earlier version as a separate file under a different name.

# Microsoft Word – Tracking Changes

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## Review tracked changes and comments

This procedure would be used by anyone wanting to review changes and comments made by specific reviewer(s).

1. If markup (markup: Comments and tracked changes such as insertions, deletions, and formatting changes. View markup when you want to process tracked changes and comments. Print a document with markup to keep a record of changes made to a document.) is not already displayed in your document, click **Markup** on the **View** menu.

**Note:** Clicking **Markup** on the **View** menu will display or hide all markup in the document. When you display all markup, all types of markup will be selected on the **Show** menu.

2. Do one of the following:

**To review each item in sequence,**

1. On the **Reviewing** toolbar (toolbar: A bar with buttons and options that you use to carry out commands. To display a toolbar, use the **Customize** dialog box (point to **Toolbars** on the **View** menu and click **Customize**). To see more buttons, click **Toolbar Options** at the end of the toolbar.), click **Next** or **Previous**.
2. Click **Accept Change** or **Reject Change/Delete Comment**.

**To accept all changes at once,**

- Click the arrow next to **Accept Change**, and then click **Accept All Changes in Document**.

**To reject all changes or delete all comments at once,**

1. Click the arrow next to **Reject Change/Delete Comment**.
2. Do one of the following:
  - Click **Reject All Changes in Document**.
  - Click **Delete All Comments in Document**.

# Microsoft Word – Tracking Changes

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## To review items created by a specific reviewer,

1. On the **Reviewing** toolbar (toolbar: A bar with buttons and options that you use to carry out commands. To display a toolbar, use the **Customize** dialog box (point to **Toolbars** on the **View** menu and click **Customize**). To see more buttons, click **Toolbar Options** at the end of the toolbar.), click **Show**. Point to **Reviewers**, and clear all check boxes except for the ones next to the names of the reviewers whose changes you want to review.
2. To select or clear the check boxes for all reviewers in the list, click **All Reviewers**.
3. Do one of the following:

### To review each change and comment shown in sequence,

1. On the **Reviewing** toolbar, click **Next** or **Previous**.
2. Click **Accept change** or **Reject Change/Delete Comment**.

### To accept all changes for the selected reviewer,

1. Click the arrow next to **Accept change**.
2. Click **Accept All Changes Shown**.

### To reject all changes or delete all comments from the selected reviewer,

1. Click the arrow next to **Reject Change/Delete Comment**.
2. Do one of the following:
  - Click **Reject All Changes Shown**.
  - Click **Delete All Comments Shown**.

# Microsoft Word – Tracking Changes

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## Troubleshoot comments, tracked changes, and compared and merged documents

### Identifying reviewers

**When I try to see who made a change (on the Show menu or in a balloon), I see an unknown identifier.**

One or more of your reviewers might not have customized their user information when they set up Microsoft Word. Instead of seeing their name in the ScreenTip (ScreenTips: Notes that appear on the screen to provide information about a toolbar button, tracked change, or comment or to display a footnote or endnote. ScreenTips also display the text that will appear if you choose to insert a date or AutoText entry.) above the Comment balloon (balloons: In print layout view or Web layout view, markup balloons show markup elements, such as comments and tracked changes, in the margins of your document. Use these balloons to easily see and respond to reviewers' changes and comments.), you see a generic identifier.

Before sending your document out for review, ask each of the reviewers to make sure they update their name in the **User Information** tab of the **Options** dialog box (**Tools** menu, **Options** command).

**The name associated with tracked changes or comments changes to "Author" every time I save my document.**

You may have selected the **Remove personal information from this file on save** check box on the **Security** tab of the **Options** dialog box. When this option is selected, personal information including the names associated with tracked changes and comments is removed when you save your document.

### Displaying markup

**I can't tell if change tracking is turned on.**

When the Track Changes feature is enabled, **TRK** appears bold on the status bar at the bottom of your document. When you turn off change tracking, **TRK** is dimmed.

Also, you may need to switch to a different review mode to see changes. To do this, click **Final Showing Markup** or **Original Showing Markup** in the **Display for Review** box on the **Reviewing** toolbar.

# Microsoft Word – Tracking Changes

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## **Some comments or tracked changes are completely hidden.**

You may have filtering applied. On the **Reviewing** toolbar, click **Show**, and then select the items that you want to display. Or, there may be so many balloons (balloons: In print layout view or Web layout view, markup balloons show markup elements, such as comments and tracked changes, in the margins of your document. Use these balloons to easily see and respond to reviewers' changes and comments.) on the screen that you can't see all of the tracked changes and comments in the document. Use the **Reviewing Pane** to see all of the changes and comments.

## **The text in balloons doesn't look like the inserted or deleted text in my document.**

When Microsoft Word displays inserted or deleted text, certain formatting elements are removed or altered to make the text easier to read. For example, the point size of all balloon (balloons: In print layout view or Web layout view, markup balloons show markup elements, such as comments and tracked changes, in the margins of your document. Use these balloons to easily see and respond to reviewers' changes and comments.) text is controlled by the Balloon Text style; so, if you delete text that uses a 24-point font, and the Balloon Text style uses a 12-point font, the balloon showing the deleted text will use a 12-point font.

Examples of other formatting that is omitted from the balloons includes centered or indented text. To see inserted or deleted text with all of its formatting attributes, and to view the text in the **Reviewing Pane**, click the **Reviewing Pane** button on the **Reviewing** toolbar.

## **All of the changes made in my document are not being tracked.**

You may need to switch to a different view to see the changes that were made to a document. View the document in print layout view (print layout view: A view of a document or other object as it will appear when you print it. For example, items such as headers, footnotes, columns, and text boxes appear in their actual positions.) or Web layout view (Web layout view: A view of a document as it will appear in a Web browser. For example, the document appears as one long page (without page breaks) and text and tables wrap to fit in the window.).

On the **View** menu, click **Toolbars**, and click the **Reviewing** toolbar.

In the **Display for Review** box, click **Original Showing Markup** or **Final Showing Markup**.

# Microsoft Word – Tracking Changes

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There are some items that Microsoft Word does not track. These include:

- AutoCaptions.
- Routing information.
- Embedded fonts.
- Some types of mail merge information, such as whether a file is a main document or a data file.
- Background color.
- Some custom options or commands such as custom toolbar buttons.

**Note:** Formatting and position changes to pictures and shapes are tracked by showing the picture or shape as a deleted and reinserted item.

## **I get unexpectedly switched from Original mode to Original Showing Changes mode.**

If you are working in Original mode with Track Changes turned on (**TRK** appears bold on the status bar at the bottom of your document), Microsoft Word automatically switches the display mode in the **Display for Review** box to **Original Showing Markup**. The mode is switched so that you can see your work as you make changes to the document.

## **I want to close the "Main document changes and comments" pane.**

This pane is called the **Reviewing Pane**. To close it, press **ALT+SHIFT+C**, or display the **Reviewing** toolbar and click the **Reviewing Pane** button.

## **Merging documents**

### **When I merge documents, I get a message about conflicting formatting changes.**

Microsoft Word can store only one set of formatting changes at a time. When you merge multiple documents, you are prompted to decide whether you want to track the formatting from the currently open document or whether you want to track the formatting from the target document (the document you selected in the **Compare and Merge** dialog box).

If you don't need to track formatting changes, you can clear the **Find formatting** check box in the **Compare and Merge Documents** dialog box (**Tools** menu, **Compare and Merge Documents** command).

# Microsoft Word – Tracking Changes

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## **I merged changes into the wrong document.**

Microsoft Word allows you to merge changes into the currently open document, into the document you selected for comparison (the target document), or into a completely new document. If you merge the changes into the current document or into the target document, you can undo the merge by clicking **Undo** on the **Edit** menu. Or, if you merged changes into a new, third document, you can close the document and start over.

## **The Compare and Merge Documents command is unavailable.**

You may be trying to compare master documents. Microsoft Word does not allow you to compare master documents.

## **Accepting or rejecting changes**

### **When I try to reject changes made to the bullets or numbers in a bulleted or numbered list, the command is unavailable.**

For formatted lists, Microsoft Word only allows you to accept formatting changes made to the bullets or numbers; you cannot reject them. Note, however, that you can accept or reject text changes to the items in a list.

### **After I reject a formatting change, my document contains unnecessary section breaks.**

When you turn on the Track Changes feature, Microsoft Word uses continuous section breaks to preserve certain types of formatting changes. If you reject a change that uses these section breaks, the section breaks remain. You can delete these section breaks by selecting them, and then pressing the **DELETE** key.

### **The Accept All Changes Shown, Reject All Changes Shown, or Delete All Comments Shown command is unavailable.**

These commands are available only if you use the **Show** menu on the **Reviewing** toolbar to hide some comments or tracked changes. If all comments and tracked changes are visible or if there aren't any comments or tracked changes in the document, these commands are unavailable.

If all changes in the document are visible, use Accept All Changes in Document, Reject All Changes in Document, or Delete All Comments in Document. To make a subset of changes visible, use the **Show** menu on the **Reviewing** toolbar.

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