

How to Edit In...

A Guide to Microsoft Word Track Changes and Comments

Introduction

Microsoft Word is a very versatile program for editing text. Most books, white papers, school papers, and other documents start out in a Word format. These files have the file extension of .doc or .docx. Word can open other file extensions, but you might run into extra formatting troubles.

The most common way to edit within Word is to use track changes and comment bubbles, or balloons, which is what we'll discuss here. Track changes allows you and other collaborators to edit the same document while still being able to see exactly what you changed. You can then choose to keep (accept) or delete (reject) those changes. Comment bubbles allow you to write comments or questions to other collaborators or to yourself within the margins of the page without mucking up the text.

Track Changes, Comments, or Both?

I recommend using both track changes and comment bubbles when editing a document, because they are best when used for different purposes. Track changes should be used when you are proofreading or changing the text directly. Examples include, fixing typos, changing awkward phrasing, and so on. Comment bubbles should be reserved for questions (queries) and longer comments/notes that don't require changes to the text at that time.

For example, let's say an author has written a white paper and I (the editor) am reviewing it prior to publication. I have track changes turned on and have been fixing minor spelling and grammar errors throughout when all of a sudden I stumble upon a sentence that is very unclear and I'm unsure how to change it. I would then add a comment bubble which asks the author to please clarify the meaning of this sentence. Then the author would then either respond within that bubble or make the change to the text directly. Having track changes turned on at the same time would allow me to see what change has been made, so I can proofread the change.

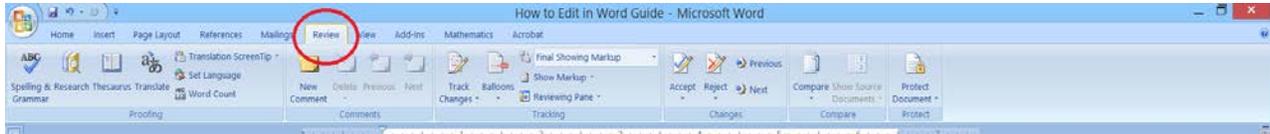
If you were to only use track changes and not comments, you would have to type any queries directly into the text. This not only breaks the flow of the document, but it increases the chance that someone will forget to delete these queries prior to publication.

On the flip side, if you were only to use comments to write in all of your minor edits in addition to your larger queries, you would have to retype all of the minor edits later. You wouldn't just be able to click "Accept" or "Reject" to have the program put the edits in for you. Plus, it would be near impossible to tell which minor edit applied to which part of the text because there would be so many dashed lines and bubbles.

How to Use Track Changes

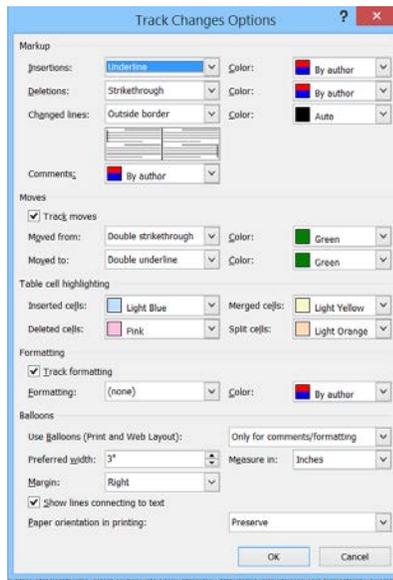
Making Edits

1. Go to the Review Toolbar at the top.



2. Click "Track Changes" to turn track changes on.

- You can change a variety of options (such as the color of your track changes) using the dropdown menu. The default will automatically change the track change edit color for each user and version. There is usually no need to change the defaults.



3. Begin editing, typing directly into the text as you normally would.

- Note: The default state of track changes is to only show comments and formatting changes in "balloons" (a.k.a. bubbles). Therefore, the rest of your changes will be shown in-line with the text in a different color. A black vertical line in the left margin will also appear, indicating a change has been made on that line. I do not recommend changing the Balloon defaults.

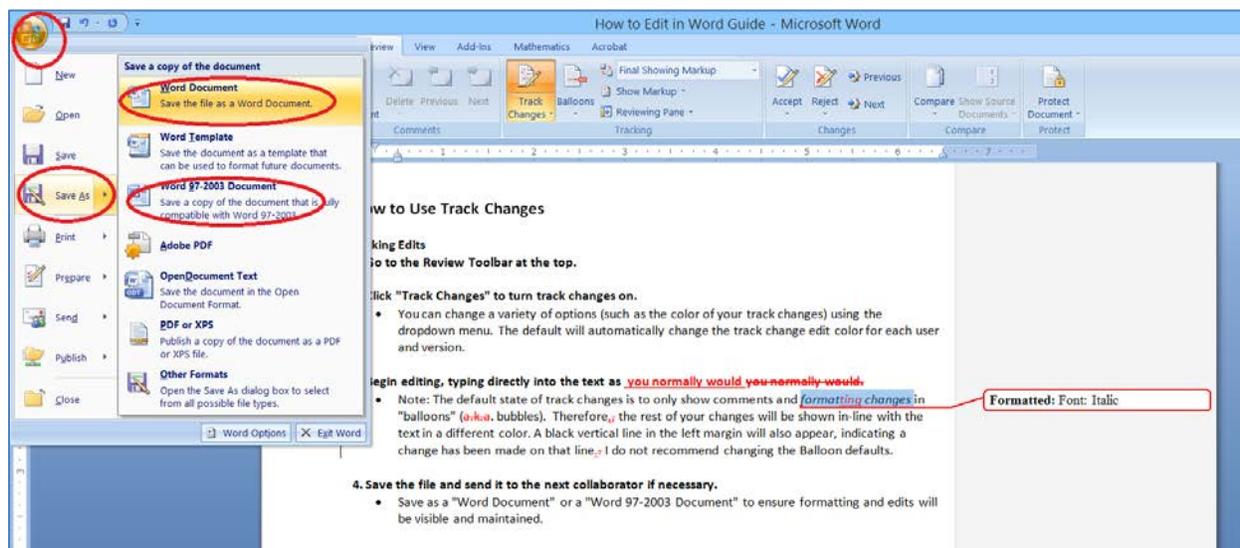
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4. Save the file and send it to the next collaborator if necessary.

- Save as a "Word Document" or a "Word 97-2003 Document" to ensure formatting and edits will be visible and maintained.



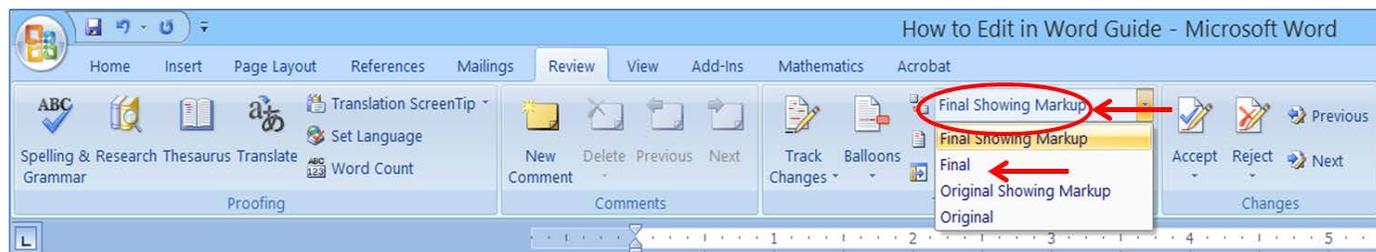
Reviewing Edits

1. Open the edited Word document. Go to the Review Toolbar at the top.

- The "Track Changes" button should still be activated, and edits should be visible within the document.

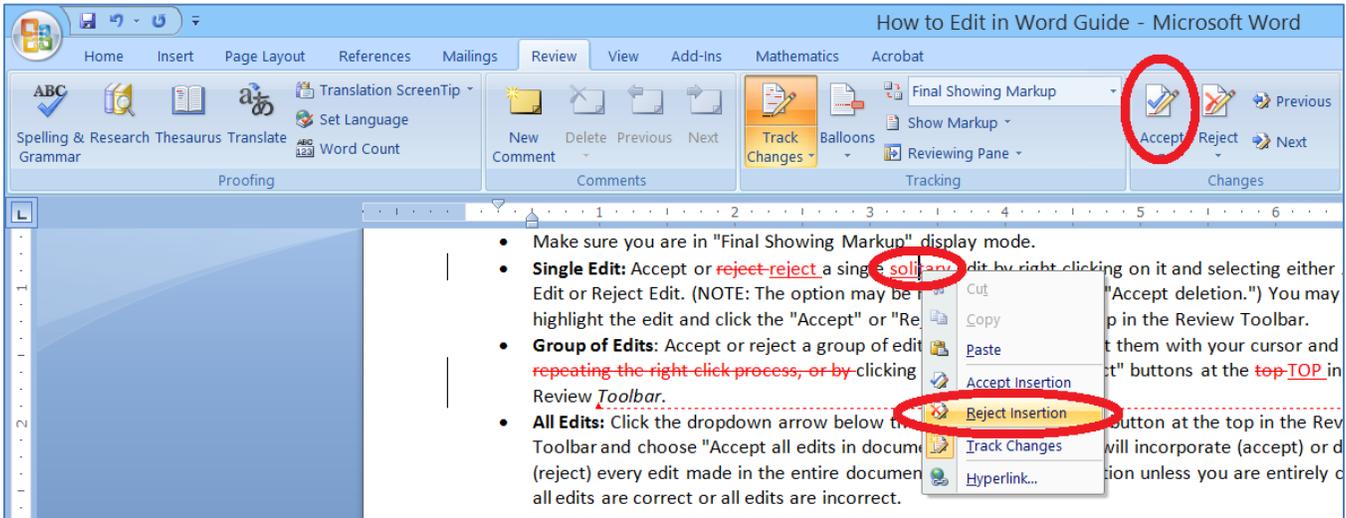
2. Review all edits.

- Look at the Display for Review dropdown menu. It should say "Final Showing Markup." Read through the document and edits in this mode, making changes as needed. If you have to make further edits, do so now. Your edits will appear in a different color.
- If the track changes are extensive and the markups are making the document very difficult to read, change the Display for Review menu to "Final." This will show you what the document would look like IF you were to accept all of the changes. This view can be especially helpful if there is unique formatting in the document such as columns, charts, spacing, and so on. You can make edits in this mode as well to correct any mistakes though your edits will not be shown in a different color until you switch back to "Final Showing Markup."

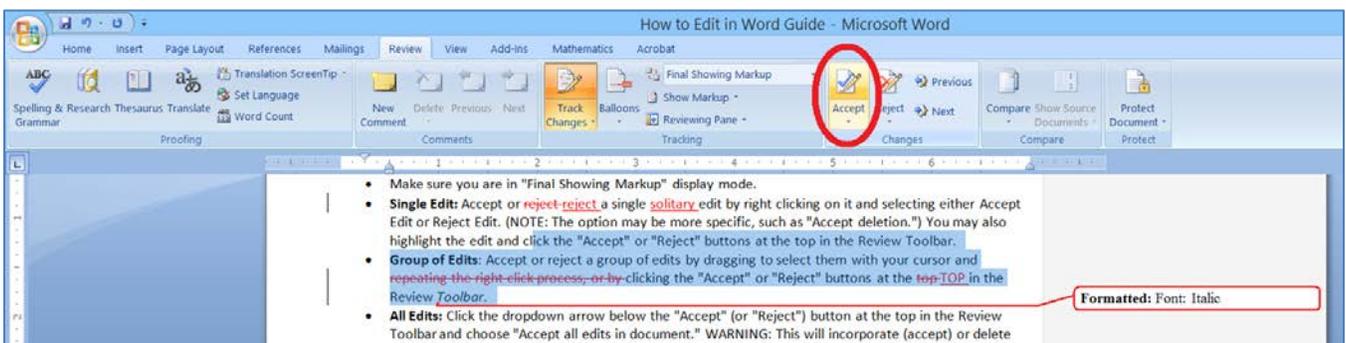


3. Accept or Reject Edits

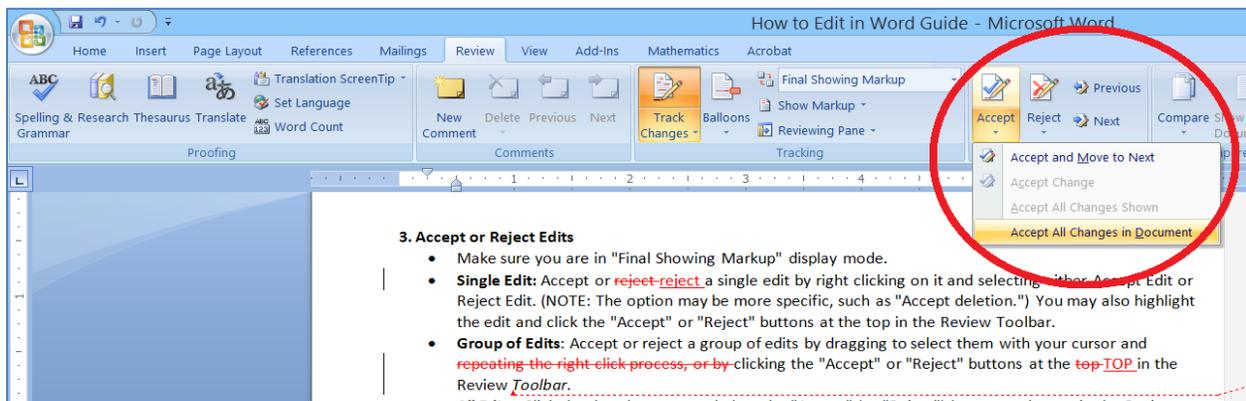
- Make sure you are in "Final Showing Markup" display mode.
- **Single Edit:** Accept or reject a single edit by right clicking on it and selecting either Accept Edit or Reject Edit. (NOTE: The option may be more specific, such as "Accept deletion.") You may also highlight the edit and click the "Accept" or "Reject" buttons at the top in the Review Toolbar.



- **Group of Edits:** Accept or reject a group of edits by dragging to select them with your cursor and repeating the right click process, or by clicking the "Accept" or "Reject" buttons at the top in the Review Toolbar.



- **All Edits:** Click the dropdown arrow below the "Accept" (or "Reject") button at the top in the Review Toolbar and choose "Accept all edits in document" (or if you need to reject all, do the same for the "Reject" button).
 - WARNING: This will incorporate (accept) or delete (reject) every edit made in the entire document. Do NOT use this option unless you are entirely certain all edits are correct or all edits are incorrect.

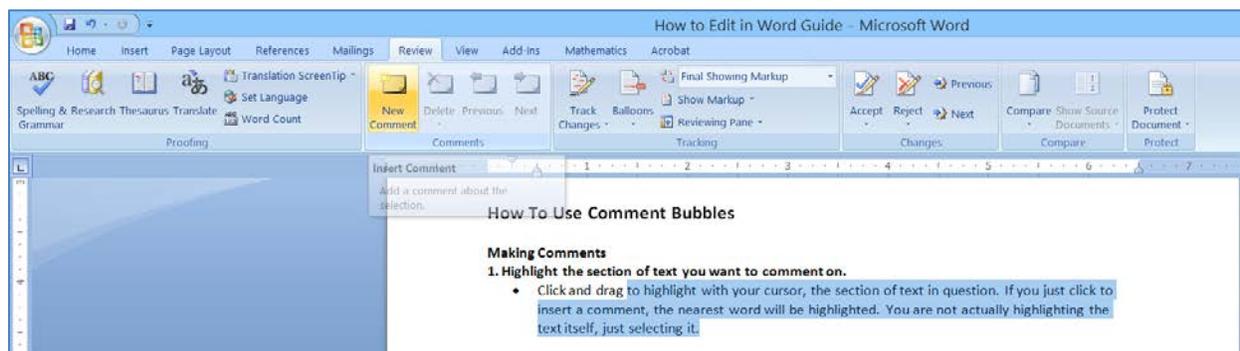


How To Use Comment Bubbles

Making Comments

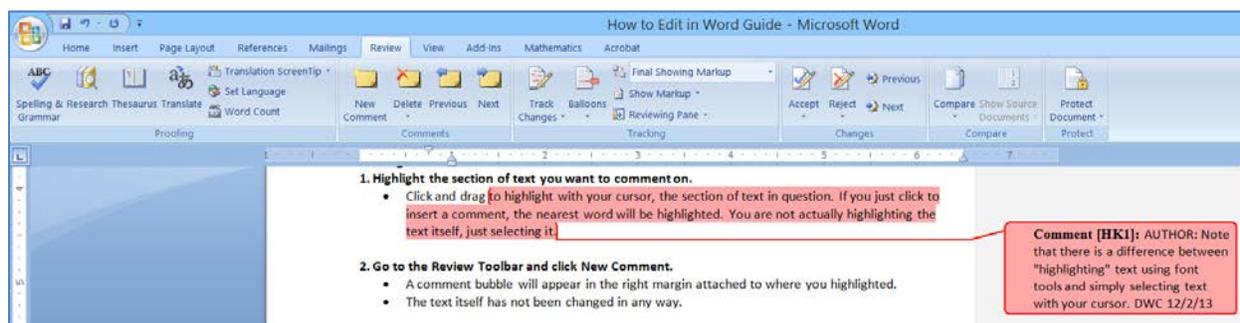
1. Select the section of text you want to comment on.

- Click and drag to highlight with your cursor, the section of text in question. If you just click to insert a comment, the nearest word will be highlighted. You are not actually highlighting the text itself, just selecting it.



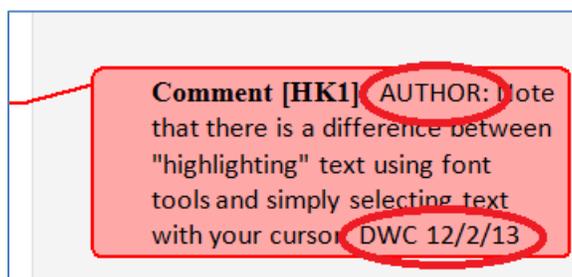
2. Go to the Review Toolbar and click New Comment.

- A comment bubble will appear in the right margin attached to where you highlighted.
- The text itself has not been changed in any way.



3. Click inside the bubble and type your question or comment.

- TIP: Write the name of the person your comment is directed to at the beginning of the comment. Add your initials and date to the end of the comment. This is especially helpful for large teams.



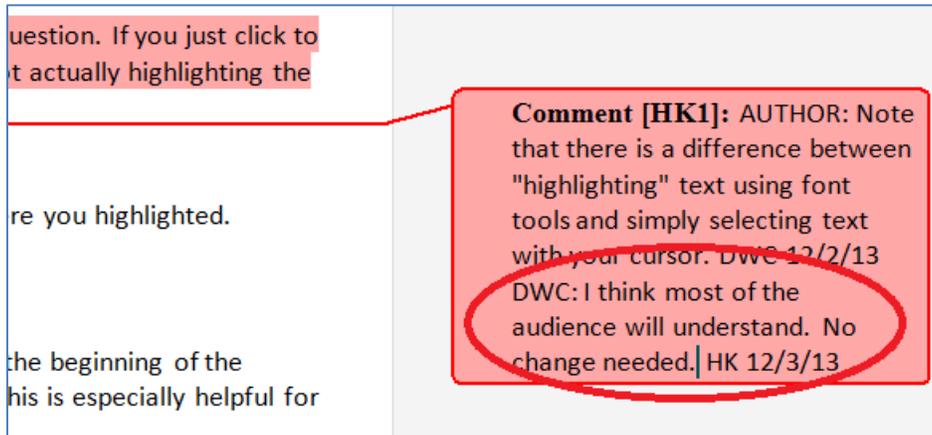
4. Save the file and send it to the next collaborator if necessary.

- Save as a "Word Document" or a "Word 97-2003 Document" to ensure formatting and edits will be visible and maintained.

Reviewing Comments/Deleting Comments

1. Open document that has comments in the right margin.

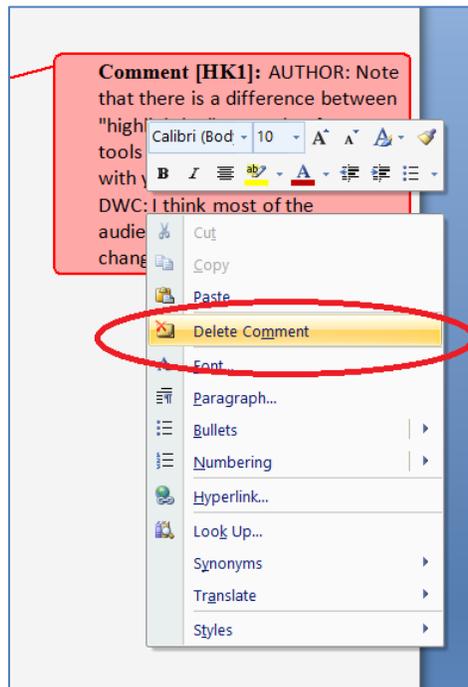
2. Click inside the bubble and reply to the question, adding your initials to your response.



3. If needed, enable track changes and edit the text in question.

- Indicate in the comment bubble you've done so.

4. When the comment/question has been completely resolved, right click on it and choose "Delete Comment".



Resources:

<http://office.microsoft.com/en-us/word-help/track-changes-while-you-edit-HA001218690.aspx>

<http://office.microsoft.com/en-us/word-help/insert-or-delete-a-comment-HA102011554.aspx?CTT=1>

