Preface


The Importance of User Names

Before reviewing any document, you need to configure your username to get the maximum use from Words’ reviewing features. This also applies to anyone else who would review the document.

To change this information:

- **Click** on the tab File | Options | Personalize your copy of Microsoft Office.
- **Type** your name in the User Name box and then your initials in the Initials box.
- **Click OK** to close the dialog box.

If you are a faculty or staff member using Microsoft Office on a University of Scranton computer the default setting for the user name is stated as “Registered User.” This is because the University purchases site licenses and not individual software licenses.

The Review Tab

The Review tab contains several commands that allow each reviewer to track, review, or add input to the original document. Upon final review, the person responsible for the outcome can accept, incorporate, or reject all changes within the document.

Groups and Commands

Although there are several groups on the Review tab, our focus is on the groups and commands associated with document review. For example, the group “Tracking” contains several commands to track document changes, manage reviewing options, and control how changes and comments are displayed in the current document.

Tracking Changes

To begin tracking document changes the user must **click** on the command “Track Changes” and then Track Changes again. Word will automatically start recording deletions, insertions, and comments made by each reviewer. Although these changes are recorded, they do not change the original document until accepted in the final review.
Change Track Options

Click the command Track Changes and then choose Change Track Options. Use the Track Changes dialog box to customize each reviewer’s changes within the document. The Track Changes feature allows the current reviewer to identify each line of deletions, insertions, and formatting changes by each reviewer.

Note: Remember that multiple options can be combined and to set all preferences before recording Track Changes.

- Insertions — adding text or a graphic
- Deletions — removal of text or a graphic
- Changed lines — sets the location of a vertical line indicating a paragraph change
- Comments — the formatting preference used to annotate a document without changing that document.
- Moves — the formatting preference when text is moved within the document
- Table cell highlighting — the formatting preference when cells are inserted, deleted, merged, or split
- Formatting — formatting changes (B, I, U, style, etc.)
- Balloons — the option of displaying or hiding balloons that are used to hold comments or formatting changes
- Preferred Width — the width of the balloons (can use inches or percent)
- Margin — display balloons in either the right or left margin.
- Show lines connecting to text — by removing the checkmark, the dashed connecting line is partially hidden until the balloon is selected. The same applies to comment balloons.

**Paper Orientation (Printing with Balloons)**

1. Auto — based on your margin and balloon settings Word will choose the best print layout.
3. Forced Landscape — prints the document and balloons in the landscape layout.
Reviewing Changes One at a Time

Before beginning, remember that you can choose to review input by a specific reviewer or by all reviewers. You decide whether to choose or combine choices, such as addressing format changes, comments, inserted or deleted text.

For example, to review only comments, change the view to “Final Showing Markup,” then click on the command “Show Markup,” and remove the checkmarks for Ink Annotations, Insertions and Deletions, and Formatting. To review only the comments made by a specific reviewer, remove the checkmarks in front of the other reviewer’s names.

Navigating through the Changes

Use the commands “Previous” and “Next” on the Review tab to navigate through the modifications to display. Either accept or reject a change (in this example, Comments) by using the “Accept Change” or “Reject Change/Delete Comment” commands in the related group. You can also right-click on a Balloon Comment and select Delete Comment from the short-cut menu.

Accepting or Rejecting All Tracked Changes

In the prior example, we elected to display only the comments from one or more reviewers. This time select the changes that you want to display and choose from one or more reviewers.

How to:
1. Change the Display for Review to “Final"
2. Make any additional edits in this view
3. Proof read the document again.
4. Click on either command, “Accept All Changes in the Document” or “Reject All Changes in the Document.”

Display for Review

The Display for Review command controls how changes and comments are displayed in the current document.

- Final Showing Markup — depending on the option selected, revisions are either shown in Balloons or Inline
- Final — what the final document would look like if all changes were accepted
- Original Showing Markup — displays inserted text and formatting changes in balloons and deleted text with strikethrough lines
- Original — displays how the original document would look if all changes were rejected

Show Markup

The additional commands below Show Markup allow you to configure the display and option settings for Comments, Insertions and Deletions, Formatting, Markup Area Highlight, Balloons and Reviewers.
Note: Tracked changes are all changes made to the document by the current reviewer (formatting, inserting, or deleting within the document). Clicking on any of the items will indicate the activity of the related option by placing or removing a checkmark.

Balloons
This command provides the option of showing all revisions inside a balloon caption, inline, or to show only comments and formatting changes in balloons. When used, balloons are displayed in the right margin with a leader line connecting the comment or formatting change.

Balloon Options
Balloons are only visible in Print or Web Layout views and are used to track and display formatting changes, deleted text, or comments. You may elect to hide the balloons or to show them only when tracking format changes and comments.

To configure these preferences:

1. Click on the tab “Review,” and then the command “Change Tracking Options” in the group “Tracking.”
2. Choose one of the options listed by the menu “Use Balloons (Print and Web Layout)”.
   a. Always – use balloons to track formatting changes, deleted text, and comments
   b. Never – display all changes in the Reviewing Pane
   c. Only for Comments/Formatting – display only inserted comments and formatting changes

Note: Choosing option (b) “Never” hides the balloons and requires that the document be displayed in “Final” or “Final Showing Markup” mode to view any changes. Choosing this option displays all deletions and formatting changes in the body of the document, whereas comments appear as “Screen Tips” when the mouse passes over the comment marker.

Reviewers
The default settings automatically assign each reviewer a different color that distinguishes their comments or track changes in a document. These changes include insertions, deletions, and formatting changes by each author.

Click the commands “Show Markup” and then “Reviewers” to display the names of all registered reviewers and their assigned colors.
Note: To specify whose comments or tracked changes are displayed in the current document either place or remove a checkmark in front of the reviewer’s name.

**Reviewing Pane**

The *Reviewing Pane*, a separate window used for reviewing comments and tracked changes of text may be positioned vertically (left side) or at the bottom of the document.

**Changes**

The group “Changes” contains several commands that assist in editing tracked changes.

**Accept**

The *Accept* command allows the reviewer to “Accept (the active change) and Move to the Next (by each line),” “Accept All Changes in the Document,” or “Accept All Changes in the Document.”

**Reject**

The *Reject* command allows the reviewer to “Reject (the active change) and Move to the Next (by each line),” “Reject All Shown,” or “Reject All Changes in the Document.”

**Comments**

The group “Comments” contains several commands that assist in editing tracked changes.

**New Comment**

*Comments* allow a reviewer to add notes or question content without marking any text inside the document. Comments inserted at an insertion point are indicated with a *thin color-coded insertion mark*. Whereas, comments associated with selected text are *enclosed within thin color-coded parentheses*. Both methods include the initials of the person responsible for the comment. They are either displayed in Balloons and/or the Reviewing Pane depending on the selected display options.

To insert a comment:

1. *Place* the insertion point where you would like the comment entered or by selecting the text associated with your comment.
2. *Click* the command “New Comment,” in the group Comments.

*Note*: If your comment was entered in a *Balloon*, *press* the *Esc key* to continue typing at the last insertion point.
Delete

Click the command “Delete” to remove the current comment, or use the options “Delete all Comments Shown” or “Delete All Changes/Comments in Document.”

Reviewing and Printing Comments

When reviewing comments in a document you can review only the comments or review the comments within tracked changes. This section details how to view only the comments, whereas reviewing comments in tracked changes are discussed under the heading “Tracked Changes.”

To Display Only the Comments

1. Open the document that you plan to review.
2. Select either “Final Showing Markup” or “Original Showing Markup” in the Tracking group on the Review tab.
3. Click the icon “Show Markup” and select only the “Comments option,” remove all other checkmarks from the item listed.

After completing the above steps, only comments and comment markers are visible within the document. Depending on the display options and the selected Document View, comments can be reviewed by scrolling through the entire document or in the Reviewing Pane.

Document Views

1. In Print Layout or Web Layout view with the balloon option turned off, the commented text is enclosed in parenthesis and the comment displays when the text is hovered over. Comments are also displayed in the Reviewing Pane.
2. In Print Layout or Web Layout view with the balloon option turned on, comments are displayed on screen. If the balloon option is turned off then comments are displayed in the Reviewing Pane.

Comments

Responses to a comment can be inserted directly below an existing comment or typed directly inside a Comment Balloon or the Reviewing Pane. To reply to or delete a comment follow the steps listed below.

Replying to a Comment

1. Click inside the comment to respond or click on the “New Comment” and the response is added below the prior comment with the letter “R” for response and the corresponding comment number inside the initial box.
2. You can also type directly inside the Comment Balloon or Reviewing Pane. If you opt for this method consider typing brackets around your response and adding your initials.
Deleting comments

1. **Right-click** on either the comment mark, comment balloon, or the comment in the Reviewing Pane, and **choose** “Delete Comment” from the short-cut menu.
2. **Click** on the “Comment Balloon” and then the “Accept Change/Delete Comment” button.

Delete comments from a specific reviewer

1. **Click** on the tab “Review,” and then the command “Show Markup” in the group “Tracking.”
2. **Mouse over** “Reviewers” and then clear the check boxes for all reviewers by **clicking** on “All Reviewers.”
3. Once more, **click** the “Show Markup” command, **mouse over** Reviewers, and then **click** the name of the reviewer whose comments you want to delete.
4. **Click** the arrow below Delete in the Comments group, and then **click** “Delete All Comments Shown.”

All comments made by this reviewer are now deleted.

Printing Comments

1. **Click** the tab File and **choose** the item Print.
2. Under Settings, **click** the “Print All Pages” down arrow to expose the Document Properties list.
3. **Click** on “List of Markup” to print only the comments.
4. **Click** Print.

Printing Revised Documents

1. To print a document containing revisions **change** the Display for Review to either “Final Showing Markup” or “Original Showing Markup.”
2. **Click** the command “Show Markup” then **select** what revisions and by whom are to be displayed.
3. **Click** on the tab File and then “Print.”
4. **Select** “Print Markup” if you want to print the document with the markup.
   - Or-
     **Select** “List of Markup” to print only the markup and not the document.
Comparing and Merging Documents

Another powerful feature includes the ability to compare and merge multiple copies of a revised document into the original or a new document showing each reviewer’s changes is. For example, as several reviewed documents are returned, you can combine two documents at a time until all reviewer changes have been incorporated into a single document.

Combine revisions from multiple authors instead

1. On the Review tab, click Compare in the Compare group.
2. Click “Combine revisions from multiple authors.”
3. Under “Original document,” click the name of the document into which you want to combine the changes from multiple sources.

If you don’t see the document in the list, click “Browse for Original.”

4. Under “Revised document,” browse for the document that contains the changes by one of the reviewers, and then click “More.”
5. Under “Comparison settings,” select the desired settings.
6. Repeat the above step for “Show changes at.”

7. By default, Word shows changes to whole words. For example, if you change the word cat to cats, the entire word cats will show as changed in the document and not simply the characters.

9. Click “OK,” to merge all the changes into the selected document.
10. To change which documents appear on screen, in the Compare group, click “Hide Source Documents” “Show Original,” “Show Revised,” or “Show Both.”

Note: Word can store only one set of formatting changes at a time. Therefore, when you merge multiple documents, you may be prompted to decide whether you want to keep the formatting from the original document or use the formatting from the edited document. If you do not need to track formatting changes, you can clear the Formatting check box in the Combine Documents dialog box.
**Displaying Changes between Two Documents in a Separate File**

The legal blackline compares two documents and displays only what changed between them in a new document. This option should not be used to compare changes from a number of reviewers, instead choose “Combine revisions from multiple authors instead.”

1. On the Review tab, in the Compare group, click “Compare.”
2. Click “Compare two versions of a document (legal blackline)”.
3. Under Original document, browse for the document that you want to use as the original document.
4. Under Revised document, browse for the document that you want use for comparison.
5. Click “More,” and select the settings for what you want to compare in the documents. Under Show changes, choose whether you want to show character or word level changes.

If you do not want to display changes in a third document, choose which document you want the changes to appear in.

*Important:* Any options that you select under “More” will be the default options chosen for comparison the next time you compare documents.

6. Click “OK.”
7. If either version of the document has tracked changes, Microsoft Office Word displays a message box. Click “Yes” to accept the changes and compare the documents.
8. Microsoft Office Word displays a new third document in which tracked changes in the original document are accepted, and changes in the revised document are shown as tracked changes.

The source documents that are being compared are not changed.