

Using Microsoft Word's "track changes" editing feature: a short guide for authors and editors

This guide summarizes how to work with an editor who has used Microsoft Word's "track changes" feature to edit your manuscript. This version of the document covers Word 2016 for Windows and the Macintosh. If you're using an older version, you can download a guide for older versions at <<http://www.geoff-hart.com/resources.html>>.

Note: Word 2016 relies heavily on the Ribbon, a toolbar that remains permanently at the top of the screen. Select the Ribbon's **Review** tab to access all of the features described in this guide.

This guide includes the following sections:

- **Edits:** to change how Word displays edits on the screen and how to insert your own edits.
- **Comments:** to view comments, insert your own comments, and delete comments you have already responded to.
- **Viewing or concealing edits:** to switch between displaying all (or a subset) of the edits, and displaying only the results of the edits.
- **Accepting or rejecting edits:** to quickly implement the changes and finalize the manuscript.

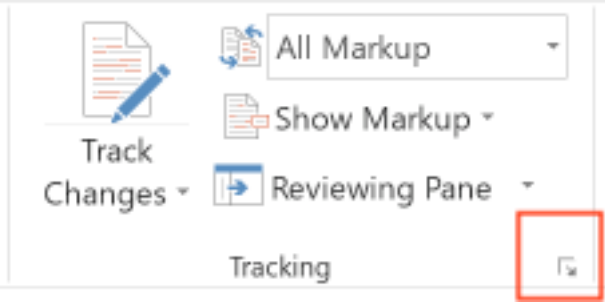
For more details on these functions, consult the online help for your version of Microsoft Word, or my book *Effective Onscreen Editing* (<http://www.geoff-hart.com/home/onscreen-book.htm>).

Edits

Most edits are small insertions or deletions. Others involve more extensive rewriting of sentences or large parts of sentences. These changes are displayed using Word's **Track Changes** feature.

Changing how edits appear on your screen

To customize how these changes appear on your screen:

Word 2016 (Windows)	Word 2016 (Macintosh)
<ul style="list-style-type: none"> • Select the Ribbon's Review tab. • At the bottom right side of the Tracking group of options, click the menu arrow:  <ul style="list-style-type: none"> • Click the Advanced Options button. 	<ul style="list-style-type: none"> • Open the Word menu and select Preferences. • Select the Track Changes tab.

- For each of the three main types of editing—insertions, deletions, and format changes—choose how the changes should be displayed (e.g., boldfaced, underlined) and the color (e.g., red) Word should use to display that format.
- For example, choose boldface for inserted text and to strikethrough for deleted text, then set the color to red for both changes. Try different combinations of settings until you find a combination that is easy for you to see and use.
- You can also change the color of the highlighting used to indicate the presence of comments inserted by the editor (which are explained later in this document).
- **Note:** These settings only apply to your computer. If the editor describes a particular format and color that you cannot see on your computer, this is why.

Inserting your own edits

To insert your own edits so the editor can quickly find and review them:

- Select the Ribbon's **Review** tab or the **Review** toolbar.
- Click the **Track Changes** icon if this feature is not already active. Click the icon again to turn off the tracking of changes.
- To easily see whether this feature is on or off, right-click or Control-click the status bar at the bottom of the document window, and select "Track changes". From now on, Word displays the status of this feature in the status bar.

Comments

If the editor was uncertain how to revise the text and wanted to ask you a question or explain a problem and propose a solution, they can insert "comments". The text of each comment is displayed in the **Reviewing** pane or in a balloon to the side of the window. Like other text, you can copy a suggested sentence and paste it into the main document instead of retyping that text. These comments display differently in different view modes, but in most cases, the group of words that a comment refers to will appear as a highlighted area of text.

- In **Draft** view, a "comment marker" that identifies the editor follows the highlighted text. Comment markers resemble **[GH1]**: that is, square brackets that contain the editor's initials followed by the comment number.
- In **Print Layout** view and **Web Layout** view, the comments appear as balloons, usually on the right side of the page.

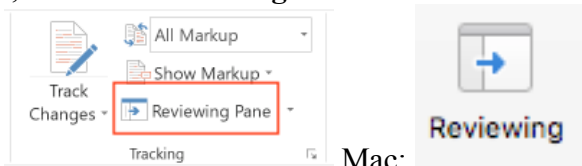
Viewing comments

To control whether Word displays the comments, select the Ribbon's **Review** tab and open the **Show Markup** menu (Windows) or the **Markup Options** menu (Macintosh). From this menu:

- Select "Comments" to display the comments.
- Deselect "Comments" to conceal the comments. (They remain in the document, but Word does not show them.)

Once you can see the balloons or the comment markers that represent the editor's comments, you can display the contents of the comment. There are three ways to do so:

- Hold the mouse cursor over the highlighted text until a small popup balloon appears and displays the comment text. (Due to a bug in Word, you may sometimes need to click the mouse to position the text cursor inside the highlighted text before the popup will appear.)
- In **Draft** view, select the comment marker using the mouse or keyboard. In the Ribbon's **Review** tab, click the **Reviewing** icon:



Windows:

Mac:

This opens the reviewing pane, which is a small area at the side of the main document window that contains details of all edits, including the comments.

- In **Print Layout** or **Web Layout** views, balloons that contain the comments will be visible at the right side of the screen. If you can't see them, ensure that "Comments" is selected in the **Show Markup** menu (Windows) or **Markup Options** menu (Mac). Then open the **Track Changes** preferences (as described earlier). Under the heading "Balloons", enter a large enough width to comfortably display the comment's text.

You can click the mouse to position the text cursor inside the **Reviewing** pane, then you can use the arrow keys to scroll through the comments and other changes. (Microsoft removed the ability to scroll from comment balloon to comment balloon in Word 2016.) The main window that contains the document will scroll to display the part of the text that a comment or change relates to. (Due to a bug in Word, it may be necessary to scroll *past* a comment or change, then scroll *back* to that comment or change to ensure that Word displays the correct part of the document.)

Inserting comments

You can also insert your own comments in response to the editor's questions. This is wise if you reject any proposed changes and want the editor to understand why. To insert a comment:

- Hold down the left mouse button and drag the mouse cursor across the text that your comment refers to. This will select the text and highlight it.
- If you accidentally move or delete the text while doing this, press Control+Z (Windows) or Command+Z (Macintosh) to undo that error.
- In the Ribbon's Review tab, click the **New Comment** icon to insert the comment.
- In **Draft** view, type your comment in the review pane at the side of the screen. In **Print Layout** or **Web Layout** views, type your comment in the balloon at the right side of the window.
- When you finish your comment, close the review pane by clicking the **Close** button at the top of the pane or by clicking the **Reviewing Pane** icon in the Ribbon's **Review** tab. If you're working with balloons, press the Esc key, or click the mouse anywhere in the main document window.

Replying to and resolving comments

If you right-click or Control-Click a comment marker (in **Draft** view) or a comment balloon (in **Print Layout** or **Web Layout** views), a menu appears and displays your options. To reply to or resolve a comment, select:

- Reply to comment: This will insert a new comment attached to the original comment so you can type your reply.
- Resolve comment: This will leave the comment in the manuscript, but will change it to light grey to indicate that you have addressed the comment.

Deleting comments

To delete a comment after you have reviewed and responded to the editor's question or suggestion:

- In **Draft** view, click the comment marker (e.g., [GHT1]) to select it, then press either the **Delete** key or the **Backspace** key.
- In **Print Layout** or **Web Layout** view, right-click inside the balloon and select **Delete comment**.

Viewing or concealing edits

Viewing edits

In the Ribbon's **Review** tab, open the **Show Markup** (Windows) or **Markup Options** (Mac) menu:

- Selecting "Comments" lets you switch between displaying and concealing the comments.
- Selecting "Insertions and Deletions" lets you switch between displaying and concealing inserted and deleted text.
- Selecting "Formatting" lets you switch between displaying and concealing format changes such as boldface, italics, and changes to paragraph styles.

This menu lets you focus on one or more specific types of change at a time (e.g., only comments, both comments and inserted and deleted text). Turning off the display of a particular change does not remove the change from your document; all changes are still present until you accept or reject them. All this option does is conceal changes you're not ready to consider right now.

Concealing edits

In the Ribbon's **Review** tab, the unlabeled menu that usually starts by displaying "All Markup" (called the **Show** menu in older versions of Word) gives you two useful options:

- Select "No Markup" to show the final manuscript that will result if you accept all of the edits. Again, these edits are still present in the document; Word just doesn't display them.
- Select "All Markup" to show all of the edits again. Which edits you see depends on the options you selected in the **Show Markup** (Windows) or **Markup options** (Mac) menu described earlier in this section.

Accepting or rejecting edits

The easiest way to review the editor's changes is by using the tools provided in the Ribbon's **Review** tab:

- Click the **Next Change** (right arrow) or **Previous Change** (left arrow) icons to find the next or previous edit, respectively.

- Click the **Accept** (checkmark) button to accept or the **Reject** (×) button to reject that edit.
- Click the **Next Change** or **Previous Change** icons if you don't want to deal with the change right now and will review it again later.

If you prefer, you can choose what to do about a given edit using the mouse: click on a change with the right-hand mouse button (Control+click if your mouse only has one button) to display a menu of options, and then choose the appropriate option (accept or reject).

If there are many edits, it can take a long time to accept each one individually. Fortunately, there's a faster way:

- First, review all comments in the document. Make the necessary changes (e.g., insert a sentence, change a word).
- Next, move through the document one sentence at a time, reviewing each edit. If you *agree* with a specific change made by the editor, simply move on to the next edit.
- If you *disagree* with a change, reject that change (see the next point in this list), but insert a comment that informs the editor what you did and why. (See the earlier section "Inserting comments" to learn how to insert your own comments and the section "Replying to and Resolving Comments" to learn how to reply to or resolve a comment.)
- To reject all of an edit, click the right-hand mouse button (or Control+click if your mouse only has one button). Both actions display a menu of options for the edited text. Select **Reject Change** from this menu. If you only want to reject part of the edit, select the inserted or deleted text first by dragging the mouse cursor across it. (That is, position the mouse cursor at the start of the text, hold down the mouse button, and drag the mouse to the end of the text.) Then right-click or Control-click, and select **Reject Change**.
- Continue reviewing each edit or comment until you reach the end of the manuscript.

To accept the remaining edits (the ones you agreed with, plus your own changes) in a single step:

- Click the small triangle beside the **Accept** icon to display a menu of options.
- Select the option **Accept All Changes**.

If you intend to make any additional changes that you want the editor to review, turn on the track changes feature (if it isn't already on) so the editor can easily see what you did. (See the earlier section "Inserting your own edits" for details.) This is more efficient (faster and less expensive) than asking the editor to re-read the entire document to find what you did.

Learn more

To learn more about onscreen editing, see the 4th edition of my book *Effective Onscreen Editing* (<http://www.geoff-hart.com/books/eoe/onscreen-book.htm>).

A wide range of useful articles about editing and other aspects of writing can be found on my Web site (<http://www.geoff-hart.com/articles/bibliography.html>).