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 2007 for Windows and Word 2008 and 2011 for 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 2007 and 2011 display the Ribbon (a permanently visible toolbar) at the top of the screen. Selecting the **Review** tab provides access to all features described in this guide. Word 2008 provides access to these features via the **View** menu; select **Toolbars**, then select **Reviewing** to display a toolbar similar to the Ribbon's **Review** tab in Word 2007 and 2011.

This guide includes the following sections:
- **Edits:** to change how edits are displayed on your computer and how to insert your own edits.
- **Comments:** to view comments, insert your own comments, and delete comments that you have responded to.
- **Viewing or concealing edits:** to switch between displaying all (or a subset) of the edits, or only the results of the edits.
- **Accepting or rejecting edits:** to implement the changes and finalize your manuscript.

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

Edits

Most edits are small insertions or deletions; others may involve more extensive rewriting of sentences or parts of sentences. These changes are displayed using Word's **Track Changes** features.

Changing how edits appear on your screen

To customize how these changes appear on your screen:

Word 2007 (Windows)	Word 2008/2011 (Macintosh)
• Select the Ribbon's **Review** tab. • Click the small triangle beside the **Track Changes** icon to display a popup menu. • Select **Change Tracking Options**.	• 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 the "Markup" (such as boldface or underlining) and the color (e.g., red) that Word should use to display that type of change. • For example, set the markup to boldface for inserted text and 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 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 style of change that you cannot see on your computer, this is why.

Inserting your own edits

To track your own changes so the editor can quickly find and review them:
- Select the Ribbon's **Review** tab or the **Review** toolbar.
- Click the **Track Changes** icon. Click the icon again to turn off the tracking of changes.

Comments

Where the editor is uncertain how to revise the text and wants to ask you a question or explain a problem and propose a solution, they insert "comments". Like any other text, you can copy text in a comment and paste it into the main document instead of retyping the suggestion. These comments have a different appearance in different view modes, but in most cases, the group of words the comment refers to will appear as a highlighted area of text:
- In **Draft** view, a "comment marker" follows the highlighted text. Comment markers resemble **[GH1]**: square brackets that contain the editor's initials followed by the comment number.
- In **Print Layout** 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, use the **Show Markup** menu (Word 2007 and 2011) or the **Show** menu (Word 2008) in the Ribbon's **Review** tab or **Review** toolbar. From this menu:
- Select "Comments" to display the comments.
- Deselect "Comments" to conceal the comments. (They remain present 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 comment's contents. 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, double-click the mouse cursor on any comment marker. Word will open the review pane, which is a small area at the bottom of the main document window that contains details of all edits, including the comments. You can instead display this pane at the side of the document window, but for simplicity I will assume that it appears at the bottom of the screen; the position does not affect how you work with this pane.
- In **Print Layout** or **Web Layout** views, balloons that contain the comments appear at the right side of the screen.

When you click the mouse to position the text cursor inside the review pane or inside a comment balloon, you can use the arrow keys to scroll through the comments and other changes. 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 insert your own comments in response to the editor's questions. This is wise if you plan to reject any proposed changes and want the editor to understand why. To insert your own comments:

- 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.
- Click the **New Comment** (Word 2007 and 2008) or **New** (Word 2011) icon to insert the comment.
- In **Draft** view, type your comment in the review pane at the bottom 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 typing your comment, close the review pane by clicking the **Close** button at the top of the pane or by clicking the **Review Pane** icon in the Ribbon's **Review** tab or toolbar. If you're working with balloons, press the Esc key, or click the mouse in the main document window.

Deleting comments

There are two ways 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** views, click the "x" in the balloon or click the **Delete** icon in the Ribbon's **Review** tab.

Viewing or concealing edits

Viewing edits

The **Show Markup** menu (Word 2007 and 2011) or **Show** menu (Word 2008) in the Ribbon's **Review** tab or the **Review** toolbar controls what you see on the screen:

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

This menu therefore lets you focus on one or more specific types of change at a time (e.g., comments versus inserted and deleted text). Choosing to turn 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 does is make it easier for you to see the remaining types of change.

Concealing edits

The menu to the left of the **Show** menu (Word 2008) or above the **Show** menu (Word 2007 and 2011) gives you two useful options:
- Select "Final" to show the final results if you accept all of the edits. Again, these edits are still present in the document; Word just does not display them.
- Select "Final Showing Markup" to show the edits again. Which edits you see depends on the options you have selected in the **Show** menu.

Accepting or rejecting edits

The easiest way to review the editor's changes is by using the tools provided in the **Review** toolbar or tab of the Ribbon:
- Click the **Next** or **Previous** buttons to find the next or previous edit, respectively.
- Click the **Accept** (checkmark) button to accept that edit or the **Reject** (×) button to reject it.
- Click the **Next** or **Previous** buttons 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.

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, 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 you did that. (See the earlier section "Inserting comments" for details on how to insert your own comments.)
- To reject an edit, select the inserted or deleted text 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.) Next, click the right-hand mouse button (Control+click if your mouse only has one button) or hold down the **Control** key and click on the selected text. Both actions will display a menu of options for the selected text. Select **Reject Change** from this menu.
- Continue reviewing each edit or comment until you reach the end of the manuscript.

To accept all the remaining edits (the ones you agreed with, plus your own changes):
- Click the small triangle beside the **Accept** button to display a menu of options.
- Select the option **Accept All Changes in Document**.

If you intend to make any additional changes that you want the editor to review, turn on the track changes feature so the editor can easily see what you have done. (See the earlier section "Inserting your own edits" for details.) This is more efficient (faster and less expensive) than asking the editor to re-edit the entire document to find what you have done.

Learn more

To learn more about onscreen editing, see 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).