

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. It includes the following sections:

- **Edits:** How to change the way that edits are displayed on your computer and how to insert your own edits.
- **Comments:** How to view comments, insert your own comments, and delete comments that you have already responded to.
- **Viewing or concealing edits:** How to switch between displaying the edits, or displaying only the results of the edits.
- **Accepting or rejecting edits:** How to quickly implement the editor's changes and finalize into your manuscript.

For more details on each of 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, but others may involve more extensive rewriting of sentences or parts of sentences. These changes to your manuscript are displayed using Word's **Track Changes** feature.

Changing how edits appear on your screen

To customize how these changes will appear on your screen:

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
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| <ul style="list-style-type: none"> • Open the Tools menu. (On Macintosh computers using the OS X operating system, open the Word menu instead.) • Select Options (Windows versions) or Preferences (Macintosh versions). • Select the Track Changes tab. • For each of the three main types of edit—insertions, deletions, and format changes—choose the "Mark" (a style, such as boldface or underlining) that will be used to distinguish between the different kinds of edits and the color (e.g., red) that Word should use to display that kind of mark. • For example, set the mark to boldface for inserted text and strikethrough for deleted | <ul style="list-style-type: none"> • For inserted text in older versions, selecting "None" under the heading "Mark" and then choosing a color would display your inserted text in that color. In newer versions, you must select "Color only" if you want your inserted text to appear in that color, with no other visual indicator such as boldface or underlining. |

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| text, and 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. | |
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Inserting your own edits

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

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
|--|---|
| <ul style="list-style-type: none"> • Open the Tools menu. • Select Track Changes. • Select Highlight Changes. • Select Track Changes While Editing if this choice does not already have a checkmark beside it. | <ul style="list-style-type: none"> • Open the Tools menu. • Select Track Changes. |

Comments

Where the editor was uncertain how to revise the text and wants to ask you a question or explain a problem and propose a solution, the editor can insert "comments". These comments appear as highlighted (often yellow) areas of text: the highlighting defines what group of words the comment refers to, and a "comment marker" follows the highlighted text.

Comment markers resemble **[GHT1]**: square brackets that contain the editor's initials followed by the comment number. The text of each comment is just like any other text: for example, you can copy it and paste it into the main document so that you are not forced to retype the suggested correction.

Viewing comments

No matter how Word has been configured, you can display comments by opening the **View** menu and selecting **Comments**. This will display the **Comments** pane (a separate area containing the comments) at the bottom of the main document window. The numbers in this pane match the numbers of the markers that you'll see in your text.

If you want to see the **[GHT1]** comment markers but they are not currently visible:

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
|--|---|
| <ul style="list-style-type: none"> • Open the Tools menu. (On Macintosh computers using the OS X operating system, open the Word menu instead.) • Select Options (Windows versions) or Preferences (Macintosh versions). • Select the View tab. • Look for the setting named Hidden Text | <ul style="list-style-type: none"> • Comment markers now appear even if the Hidden Text option is not selected. • In the Track Changes tab of the Options dialog box, you now have the option of choosing the color that will be used to highlight any text that the editor selected before inserting a comment. |

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| <p>(around the middle of the right side of this tab). Click in the box beside this setting to select this option.</p> <ul style="list-style-type: none"> • Click OK to close the dialog box. | <ul style="list-style-type: none"> • In the Track Changes tab of the Options dialog box, you now have the option of using "balloons" to display your comments. You can also set this option to "Never" if you do not want to use the balloons. |
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Once you can see the highlighted text or the comment markers that represent the editor's comments, you can display the comment text itself. There are three ways to do so:

- Hold the cursor over the highlighted text until a small balloon appears that displays the comment text. (Due to a bug in some versions of Word, you may sometimes need to click to position the text cursor inside the highlighted text, move the mouse cursor outside this area, then move the mouse cursor back over the highlighted text.)
- Double-click the mouse cursor on any comment marker. Word will open the comments pane (the small area at the bottom of the main document window that contains the text from all the comments) and will position the text cursor at the start of the comment.
- Open the **View** menu and select **Comments**. This also opens the comments pane. Clicking in this pane lets you scroll through the comments; when you position the text cursor inside one of the comments, the main document window will also scroll to display the part of the text where that comment was inserted. (Due to a bug in some versions of Word, you may have to scroll past a comment, then scroll back to it before the screen display is correct.) Clicking the comment number at the left side of the comment pane will scroll the main document window to the part of the text that contains that comment.

Inserting comments

You can insert your own comments in response to the editor's questions, and you should do so if you plan to reject any proposed changes and want the editor to understand why. To insert your own comments:

- Hold down the mouse button and drag the mouse cursor across the text that the comment refers to. This selects the text and highlights it.
- Open the **Insert** menu.
- Select **Comment**. If you accidentally deleted your text by pressing the wrong key, immediately press **Control+Z** (Windows) or **Command+Z** (Macintosh) to restore the deleted text, then try again.
- Word will insert a comment marker immediately after the text that you selected, then will open the comments pane below your text. Type your comment in this pane.
- When you have finished typing your comment, click the **Close** button at the top of the comments pane. (In newer versions of Word, this button has been eliminated. Open the **View** menu and select **Comments** instead.)

Deleting comments

WARNING: In older versions of Word, it is possible to delete the comment numbers that appear at the left side of the comments pane. (Newer versions will not let you do this.) This can cause serious problems, including corruption of the document. If you accidentally do this, immediately press **Control+Z** (Windows) or **Command+Z** (Macintosh) to restore the deleted comment marker.

There are two ways to delete a comment after reviewing the editor's question or advice and choosing an appropriate response:

- Click the **[GHT1]** comment marker to select it, then press either the **Delete** key or the **Backspace** key.
- Position the text cursor directly in front of the comment marker and press the **Delete** key or immediately after the comment marker and press the **Backspace** key. This first keystroke will only select the marker; press either key again to actually delete it.

If revision tracking is still turned on, the comments will not actually disappear. Instead, Word will mark the comment as deleted text, just as it would do when you delete any other kind of text. To permanently remove the comment, simply accept this deletion. (See the section "Accepting or rejecting edits" for details.)

Viewing or concealing edits

Viewing edits

To see *all edits* that were made using revision tracking:

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
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| <ul style="list-style-type: none"> • Open the Tools menu. • Select Track Changes. • Select Highlight Changes. • Select Highlight changes on screen if this option does not already have a checkmark beside it. • If you still cannot see the edits, consult the section "Changing how edits appear on the screen" for details of how to change the display settings. | <ul style="list-style-type: none"> • If the Reviewing toolbar is not already visible, open the View menu, select Toolbars, and select Reviewing. • At the left side of the Reviewing toolbar, to the left of the "Show" menu, you will see another menu that lets you select the display options. Select "Final Showing Markup". |

Concealing edits

To display *only the results of the edits*:

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
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| <ul style="list-style-type: none"> • Open the Tools menu. • Select Track Changes. • Select Highlight Changes. • Click the checkbox beside Highlight changes on screen to turn off this option. | <ul style="list-style-type: none"> • If the Reviewing toolbar is not already visible, open the View menu, select Toolbars, and select Reviewing. • At the left side of the Reviewing toolbar, to the left of the Show menu, you will see another menu that lets you select the display options. Select Final. |

Accepting or rejecting edits

In all versions of Word, the easiest way to review the editor's changes is by displaying the Reviewing toolbar and using its tools. To display this toolbar, open the **View** menu, select **Toolbars**, and select **Reviewing**. You can now click the **Find next** button to find each edit, and either click the **Accept** (checkmark) button to accept that edit or the **Reject** (×) button to reject that edit.

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

- Move through the document one sentence at a time, reviewing each edit and responding to each comment (e.g., by inserting new text or changing the wording). 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 have done and why you did that. (See the 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 (Windows) 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):

| Word 97/2000 (Windows) and Word 98/X (Macintosh) and earlier versions | Word XP/2002/2003 (Windows) and Word 2004 (Macintosh) |
|---|---|
| <ul style="list-style-type: none"> • Open the Tools menu. • Select Track Changes. • Select Accept or Reject Changes. • Click the Accept All button. • Word will ask you to confirm that you want to accept all the edits without reviewing them. Click OK to do so. | <ul style="list-style-type: none"> • If the Reviewing toolbar is not already visible, open the View menu, select Toolbars, and select Reviewing. • Beside the checkmark button that you use to accept individual edits, you will see a small downward arrow: click this to display a menu of options, and select Accept All Change in Document. |

If you intend to make any additional changes that you want the editor to review, turn on the track changes feature so that the editor can easily see what you have done. (See the 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>).