Tracking Revisions

Revising a document with tracked changes in Word works just like revising a document with a printed copy and a red pen; you can easily see the original text and any additions, deletions, or changes made to the document are highlighted.

Turn on tracking so the author can see the changes you recommend. In the end, they can choose which changes to include in the final document.

☐ Click the **Review** tab on the Ribbon and click the **Track Changes** button in the Tracking group.

The button is highlighted, indicating that tracking is turned on.

🔶 **Other Ways to Track Changes:**
Press **<Ctrl>** + **<Shift>** + **<E>**. Or, right-click the status bar and select **Track Changes** from the list. Click the **Track Changes** button in the status bar to turn the feature on or off.

☐ Edit the document as necessary.

The changes are highlighted as they are entered in the document.

✅ **Tips**

▪ To change the color used to mark changes, click the **Track Changes** button list arrow and select **Change Tracking Options** from the list.

▪ **Exercise**

☐ **Exercise File:** Seniors11-1.docx

☐ **Exercise:** Turn on tracking changes to make revisions: Type "Thank you for your interest in North Shore Travel!" at the beginning of the first body paragraph.

Replace "yourselves" in the last sentence of the second body paragraph with "Pleasant Hills".

Replace "great" in the last sentence of the second body paragraph with "wonderful".

Show the tracked revisions in balloons. Return to showing the revisions inline.
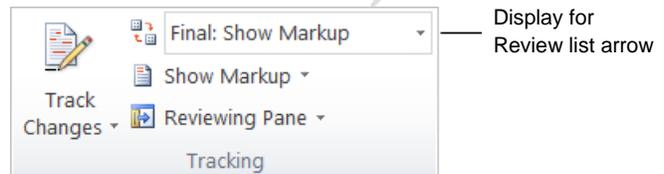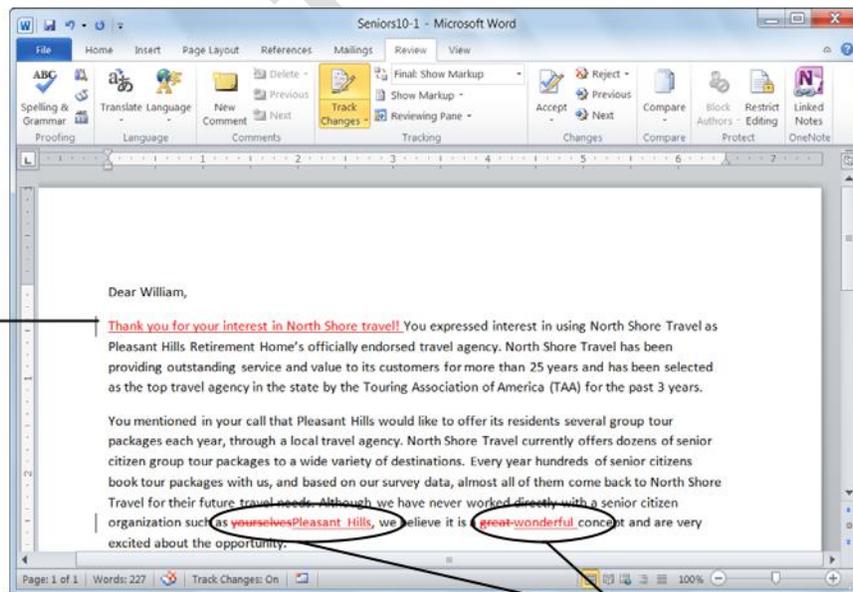
Turn off tracking changes.

Display for Review list arrow

Figure 11-1: The Tracking group.

These bars indicate that a revision has been made in the paragraph.

Deleted and replaced text.

Figure 11-2: Tracked and Highlighted changes shown inline in a document.

Change how tracked changes are displayed

By default, tracked changes are shown inline with the other text in the document. You can change the revisions so that they are shown in balloons, and you can also change the color of the revisions.

The changes are called "markup".

Show changes in balloons: Click the **Show Markup** button in the Tracking group on the Ribbon and select **Balloons**. Then, select **Show Revisions in Balloons** from the list.

Display or hide markup: Click the **Display for Review** list arrow and select an option from the list.

Display or hide specific markup items: Click the **Show Markup** button in the Tracking group to display or hide specific markup items.
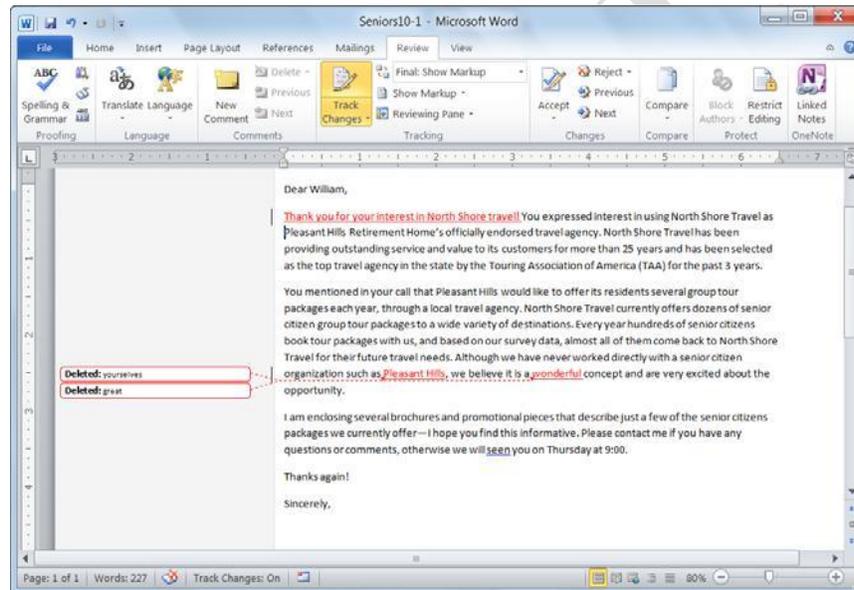

Figure 11-3: Tracked and Highlighted changes shown in balloons in a document.

Accepting and Rejecting Revisions

Revising documents using Word's revision features can save a lot of time, because the changes are already entered in your document. If you accept the changes, Word automatically incorporates the changes into your document. If you reject the changes, Word uses your original text.

Use the Ribbon

☐ Click the **Review** tab on the Ribbon and click the **Next Change** button in the Changes group.

Word highlights the first revision in the document. Decide if you want to accept the revision, or reject it.

☐ Click **Accept and Move to Next**, or click **Reject and Move to Next** in the Changes group.

The revision is accepted and incorporated into the document, or rejected and removed from the document. By default, the next revision in the document is highlighted, so you can accept or reject it.

🔹 **Other Ways to Accept or Reject Changes:** Click the **Accept** button list arrow or the **Reject** button list arrow to select a different option, as shown in the table below. Or, right-click the revision and select the desired action from the contextual menu.

☐ Repeat until all proposed revisions are accepted or rejected.

The proposed changes are either included or removed from the document.

Table 11-1: Accept or Reject Options

Accept or Reject and Move to Next	The proposed change is acted on and the next change is highlighted.
Accept or Reject Change	The highlighted change is accepted or rejected.
Accept or Reject All Changes Shown	Accepts or rejects all changes that are currently visible in the window.
Accept or Reject All Changes in Document	Accepts or rejects every single change in the document.

☐ **Exercise File:** Seniors11-2.docx

☐ **Exercise:** Open the Reviewing Pane and accept the first tracked change.

Close the Reviewing Pane.

Accept the "Pleasant Hills" revision.
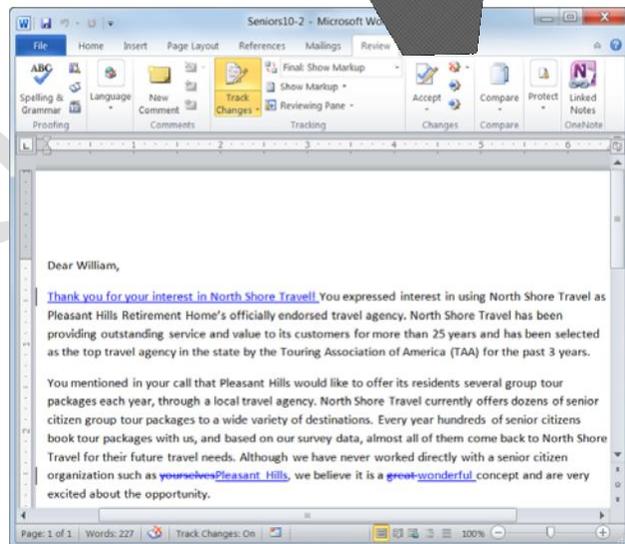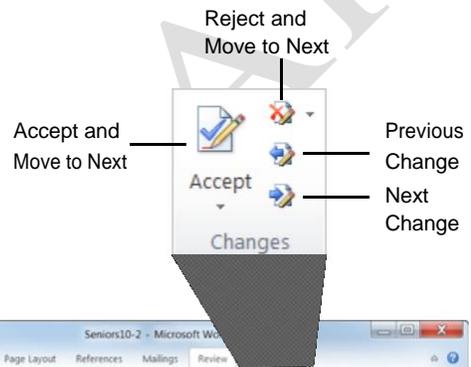
Reject the "wonderful" revision.

Figure 11-4: Use the buttons in the Changes group to accept and reject changes.

Use the Reviewing Pane

The Reviewing Pane is a great way to review all the tracked changes in a document. It displays all of the proposed changes in your document, the total number of changes, and the number of changes of each type.

☐ Click the **Review** tab on the Ribbon and click the **Reviewing Pane** button in the Tracking group.

The Reviewing Pane appears. A summary of the revisions appears near the top of the pane, while the actual revisions are grouped by section in the document.

🟢 **Tip:** You can view the Reviewing Pane vertically or horizontally in the window by clicking the **Reviewing Pane** list arrow and selecting an option from the list.

☐ Click a revision in the Reviewing Pane to select it in the document.

You can now choose whether or not you want to accept or reject the revision in the document.

☐ Click the **Accept** or **Reject** button in the Changes group on the Review tab of the Ribbon.

🔵 **Other Ways to Accept or Reject a Change:** Right-click the revision and select the desired action.

The revisions disappear from the Reviewing Pane as they are accepted or rejected in the document.

☐ Click the **Close** button in the Reviewing Pane.

The Reviewing Pane is closed.

🟢 Tips

▪ When editing of a document is finished, you can mark the document as final so that other people don't make changes, and the document is read-only. Click the **File** tab and click the **Protect Document** button on the Info tab. Select **Mark as Final** from the list.
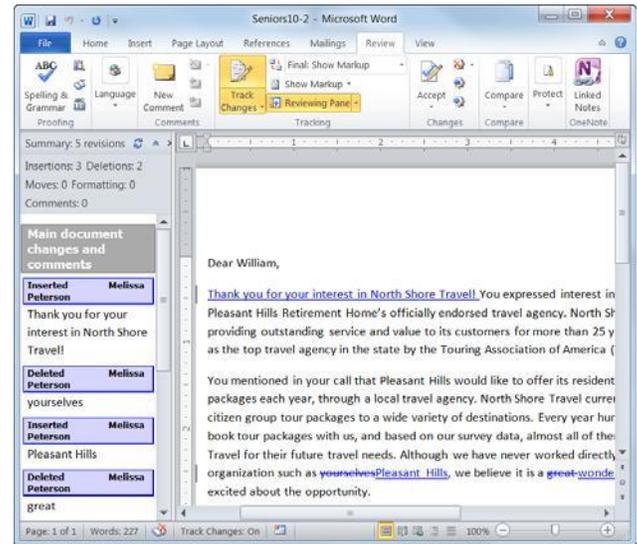

Figure 11-5: The Reviewing Pane placed vertically in the window.

Using Comments

Adding a comment to a document is like a sticking a Post-It note to it. You can use Word's comments feature to add suggestions, notes, or reminders to your documents. You can add a comment virtually anywhere in a document. Comments appear on the document in bold -colored balloons that are almost impossible to miss and are easy to read.

Insert a comment

☐ Place the insertion point, or select the text, where you want to insert the comment.

   If you select text, the text will be highlighted the same color as the comment balloon.

☐ Click the **Review** tab on the Ribbon and click the **New Comment** button in the Comments group. The comment balloon is inserted.

☐ Enter the comment text in the balloon. The

   comment is inserted in the document.

Edit a comment

You can easily make changes to a comment simply by typing in any comment balloon.

   Click in the comment balloon and edit the text as needed.

Delete a comment

Delete a comment when it is no longer needed.

☐ Select the comment balloon.

   Select the balloon by clicking the text in the balloon.

☐ Click the **Review** tab on the Ribbon and click the **Delete Comment** button in the Comments group.

   🔶 **Other Ways to Delete a Comment:** Right-click the comment balloon and select **Delete Comment** from the contextual menu.

- **Exercise**

☐ **Exercise File:** Seniors11-3.docx

☐ **Exercise:** Select the text "I am enclosing" at the beginning of the third body paragraph.

   Insert a comment that says, "Can we add our web address here?"

   Hide comments in the document.

   Show comments again, and edit the comment to add the text, "It's www.northshoretravel.com."
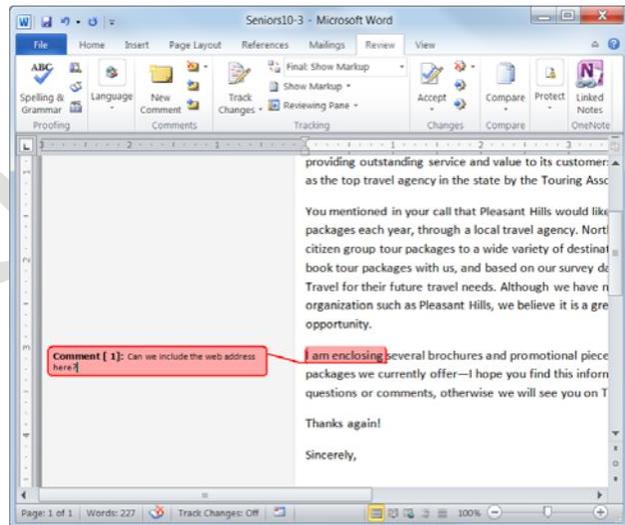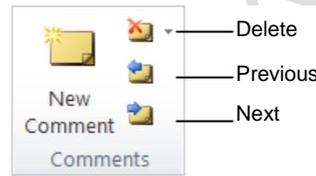
   Delete the comment.

Delete
Previous
Next

Figure 11- 6: Comments appear in the margins of the document.

Review comments

You can easily review comments by jumping between each comment in a document.

☐ Click the **Review** tab on the Ribbon.

☐ Use the **Next Comment** and **Previous Comment** buttons in the Comments group to navigate through the comments in the document.

The comments in the document are shown as you click the Next and Previous buttons.

Hide or display comments in a document

If comments are distracting, you can easily hide them. This does not remove them, it only hides them from view temporarily.

☐ Click the **Review** tab on the Ribbon and click the **Show Markup** button in the Tracking group.

A list of items that are displayed in the document appear. If the item has an orange checkmark next to it, it is being displayed in the document.

☐ Select **Comments** from the list.

The comments are now hidden in the document. Repeat to display comments once again.

Print comments

The last thing we'll discuss with comments is how to print them. Since they don't print automatically, you must change your print settings to include them.

☐ Click the **File** tab on the Ribbon and select

Print. The Print tab appears.

☐ Click the **Print All Pages** list arrow and select **Print Markup** from the list.

This ensures that comments and any tracked changes that still appear in the document will be printed along with the rest of the document.

☐ Click **OK**.

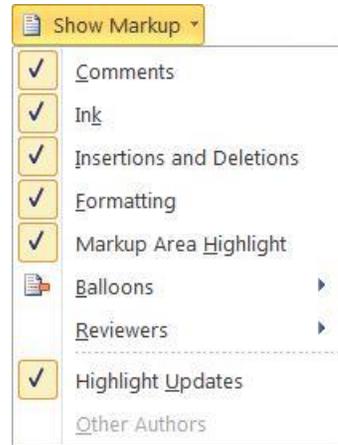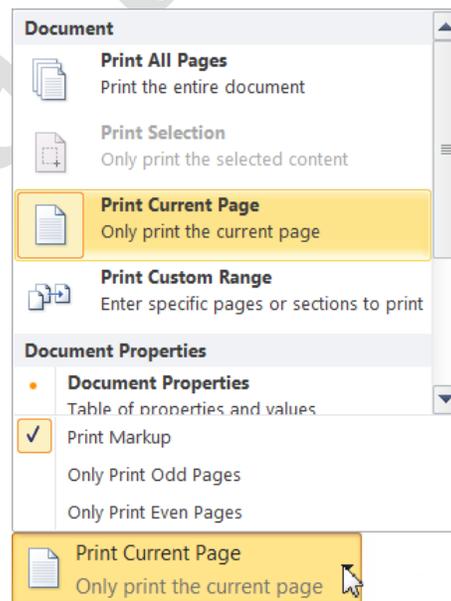The document prints with the comments.

Figure 11-7: Uncheck Comments in the Show Markup menu to hide comments in the document.

Select what you want to be printed in the document from the Print what list arrow.

Figure 11-8: Select what you want to print from the first list arrow on the Print tab.

Comparing and Combining Documents

Comparing and combining documents lets you see the difference between documents. For example, if you and a co-worker have made changes to the same document in separate files, you can combine them together so that all the changes are incorporated into a single document, saving time and increasing accuracy.

☐ Click the **Review** tab on the Ribbon. Click the **Compare** button in the Compare group.

A list of options you can use to merge the documents appears:

> **Compare:** Use this to see the differences between two documents without changing the documents being compared. The legal blackline comparison is displayed by default in a new third document.

> **Combine:** Use this to combine revisions from several documents into one document. For example, if Steve, Kitty, and Melissa are making revisions for Jon's document, they can combine their revisions into one document. This makes it easier for Jon to incorporate their revisions.

☐ Select **Compare** or **Combine**.

The Compare Documents or Combine Documents dialog box appears.

☐ Click the **Original document** list arrow and select the document you want to use as the original.

The revised document will be compared to this document.

🔄 **Other Ways to Select the Original Document:** Select **Browse** from the list or click the **Browse for Original** button to the right of the list arrow and navigate to the file.

☐ Click the **Revised document** list arrow and select the document that contains the changes you want to merge into the original document.

Any text in this document that is different from that in the original document is shown as a tracked change.

🔄 **Other Ways to Select the Revised Document:** Select **Browse** from the list or click the **Browse for Revised** button to the right of the list arrow and navigate to the file.

▪ **Exercise**

☐ **Exercise File:** Seniors11-3.docx and Seniors11-1.docx

☐ **Exercise:** Combine Seniors10-1.docx and Seniors10-3.docx in a new document.

Click the **Browse for** buttons to choose which documents to merge.

Use the Show changes in options to determine how the documents should be compared or combined.
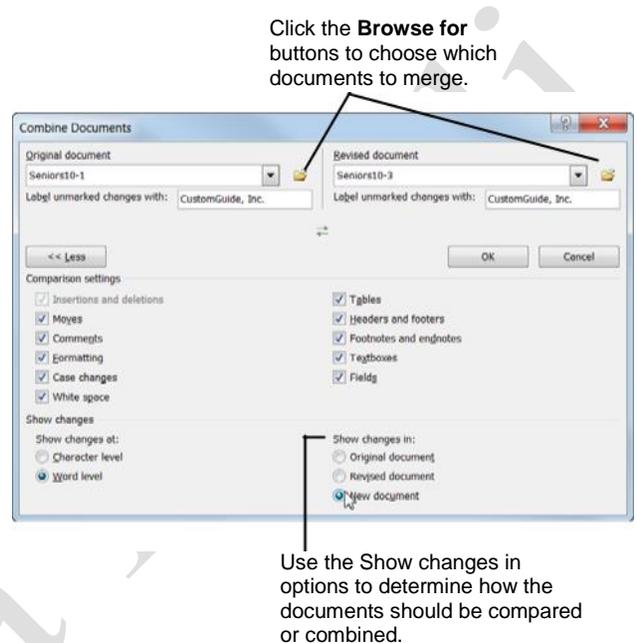
Figure 11-9: The Combine Documents dialog box.

☐ (Optional) Click **More**.

The settings you can use to change how the changes appear in the document are displayed.

Comparison settings: Lets you choose which items you want to appear when the documents are merged.

Show changes: Lets you select the options for what you want the changes to appear. See the table on the right for more information about these settings.

☐ (Optional) Select the settings you want to use.

☐ Click **OK**.

The results of the compare or combine are displayed in a new Word document.

✅ **Tips**

▪ Don't try to compare and merge documents that don't have similar content. The results will be very difficult

▪ To ensure that both the original and revised documents display in the document window, click the **Compare** button and select **Show Source Documents** from the list. Select **Show Both** if you would like to display both the original and the revised documents.

Table 11-2: Show Changes Settings

|	
Character level	Character differences between the documents are shown as single characters rather than the whole word.
Word level	This option is selected by default, and it is easier to detect changes. It means that if a character in a word changes, the whole word is highlighted, not just a single character.
Original document	This option merges the results in the selected document. In this example, the Lesson 9A document would open and display all the differences between the documents.
Revised document	This option merges the results in the open document. In this example, the Seniors document would display all the differences between the documents.
New document	This option merges the results in a brand new document. This is a good option because the original documents are not changed.
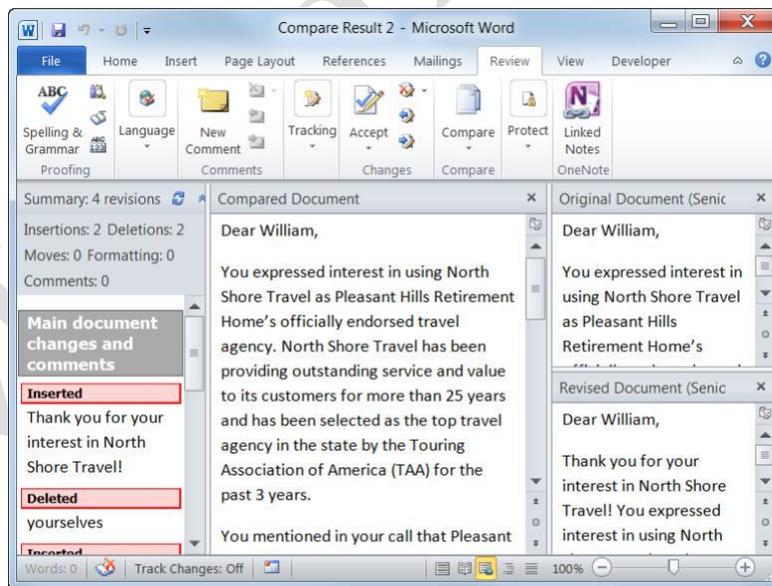
Figure 11-10: The results of combining the two documents.

Password Protecting a Document

If you have a document you don't want anyone else to see or modify, you can password-protect, or *encrypt*, the document. This restricts access to only yourself or people who know the password. You can require users to enter a password to open a document and/or modify a document.

Add a password to open a document

You can add a password to a document to open it.

☐ Click the **File** tab on the Ribbon.

The Info tab of Backstage view appears.

☐ Click the **Protect Document** button and select **Encrypt with Password** from the list.

The Encrypt Document dialog box appears.

☐ Click the **Password** text box and type a password.

You can type up to 255 characters for the password.

✅ **Tip:** Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better.

☐ Click **OK**.

The Confirm Password dialog box appears.

✅ **Tip:** It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it.

☐ Retype your password and click **OK**.

The Info tab changes to indicate that a password is required to open the document.

Add a password to modify a document

This password protects the document so that anyone can open the document, but a password is required to modify it.

☐ Click the **File** tab on the Ribbon and click **Save as**. The Save As dialog box appears.

- ▪ **Exercise**

☐ **Exercise File:** Seniors11-5.docx

☐ **Exercise:** Add a password to open the document and add another password to modify the document.

Close the document.

Use the passwords to open the document and change the opening text to "Dear Wendy,"

Figure 11-11: The Encrypt Document dialog box.
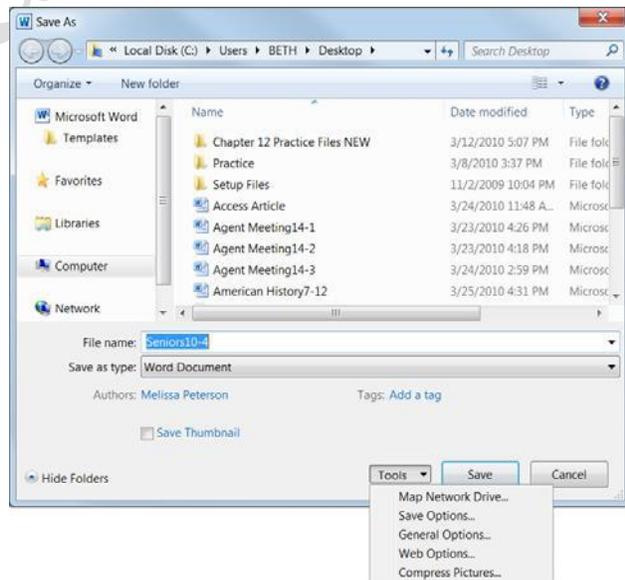
Figure 11-12: Open General Options from the Tools list in the Save As dialog box.

☐ Click the **Tools** button at the bottom of the Save As dialog box and select **General Options** from the list.

The General Options dialog box appears. Note that there are two password text boxes here: one to open the document and one to modify the document.

☐ Click the **Password to modify** text box and enter the password.

☐ Click **OK**.

☐ Reenter your password and click **OK**.

The password is confirmed.

✅ **Tips**

▪ If you require users to enter a password to both open and modify a presentation, make sure each password is different from the other.

▪ To remove a password, open the General Options dialog box and remove the password from the "Password to open" or "Password to modify" text box in which it was entered.

Figure 11-13: Add passwords in the General Options dialog box.

Figure 11-14: When an incorrect password is entered, the Microsoft Office Word dialog box appears.

Protecting a Document

You can protect a document's formatting, protect specific portions of a document, and even grant permissions for different users to modify specific parts of a document. Sound confusing? Don't worry—once you finish this lesson, everything will make a lot more sense.

Protect a document's formatting

Activating this protection will restrict the formatting in the document to specific styles. It will also prevent users from applying formatting directly to the document. For example, another user couldn't apply bold formatting to a heading.

☐ Click the **File** tab on the Ribbon.

The Info tab of Backstage view appears.

☐ Click the **Protect Document** button and select **Restrict Editing** from the list.

The Restrict Formatting and Editing task pane appears along the right side of the window.

⚡ **Other Ways to Open the Restrict Formatting and Editing Task Pane:** Click the **Review** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.
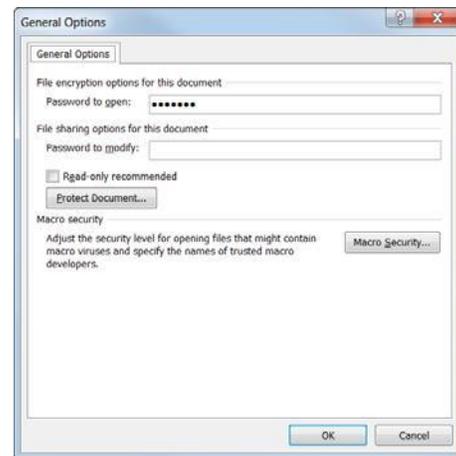
☐ Click the **Limit formatting to a selection of styles** check box.

☐ Click the **Settings** link to select the styles you want to use in the document.

The Formatting Restrictions dialog box appears.

To restrict the formatting in the document to the use of specific styles, select the check boxes of the styles you want to use.

Protect a document's content

Controlling the content of the document is another valuable restriction. You can even apply exceptions to the document protection. For example, the entire document is "Read only" protected except certain areas that you designate.

☐ Click the **File** tab on the Ribbon.

The Info tab of Backstage view appears.

■ **Exercise**

☐ **Exercise File:** Seniors11-6.docx

☐ **Exercise:** Protect document formatting so that the recommended minimum number of styles can be used.

Protect the document contents so comments are the only type of editing you can do in the document.

Click this to control the formatting used in the document.

Choose the protection you want to apply.

Apply an exception to selected text.

Add users to the Exceptions list.

Click here to apply the restrictions.

Figure 11-15: The Restrict Formatting and Editing task pane displays options for protecting the document.

☐ Click the **Protect Document** button and select **Restrict Editing** from the list.

The Restrict Formatting and Editing pane appears in the Word window.

🔸 **Other Ways to Open the Restrict Formatting and Editing Task Pane:** Click the **Review** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.

☐ Click the **Allow only this type of editing in the document** check box.

Notice that the list arrow below the check box is now activated, and the Exceptions area of the Protect Document task pane appears.

First, choose the type of protection you want to use. Table 11-3: Editing Restriction Options explains your options.

☐ Click the list arrow and select a type of protection.

Add an exception

After a document has been protected, you can add exceptions to the protection.

☐ Select the text you want to exempt from protection in the document.

There are two ways to add exceptions to the protected document:

Click the **Everyone** check box to grant the exception to everyone who views the document.

Click the **More users** link and type the user names or e-mail addresses separated by semi-colons and click **OK**.

✅ **Tip:** If you select more than one individual, the individuals are added as an item to the Group box, so you can easily select them again without having to select them individually.

☐ Add the exceptions as necessary.

☐ Click the **Yes, Start Enforcing Protection** button to begin protection.

☐ (Optional) Enter a password so that users who know the password can remove the protection.

☐ Click **OK**.

✅ **Tips**

▪ Exceptions can only be applied to Comments and No changes (Read only) editing restriction protection.

Table 11-3: Editing Restriction Options

No changes (Read only)	No editing or modifying is allowed. You can add exceptions to this type of restriction.
Tracked changes	Any change or modification made by the user is tracked and highlighted. You cannot use exceptions with this type of protection.
Comments	Users cannot change or modify the document text, but they can insert comments. You can add exceptions to this type of restriction.
Filling in forms	This option is only applicable in documents where forms are used.

Figure 11-16: Click the More users link and add users in the Add Users dialog box.

Reference: **Custom○uide** Online Learning