Comparing and merging documents in Word

Have you ever sent out a document for review, only to find your reviewers have not used Track Changes to record their amendments? Or, have you sent out a document to several reviewers simultaneously and now have to sort through each different version of the file to find the changes? This note shows you how to make life easier by using the Compare and Merge function in Word.

Compare and Merge essentially has two separate functions. In one, it will compare two documents then merge the changes into the document of your choice; this is the Merge function. In the other, it will compare two documents and merge the changes into a third document without giving you a choice; this is the Compare function. In both cases, the amendments appear as tracked changes.

Compare and Merge will work with documents amended with and without tracked changes switched on.

To find out about tracking, see the note: Tracking changes in Microsoft Word:
www.uics.ed.ac.uk/eucs_documentation/Documents_by_Number/3599/3599.pdf

Using the Merge function

In this function, you can merge the changes from one document into another, or, if you wish, create a separate document.

Open the first document, normally your original. (It doesn’t matter if there are other documents open, but to avoid confusion, you may want to close them.)

Select Tools – Compare and Merge Documents.

Navigate to the second document and select it. The Find formatting option at the bottom is checked by default. This will show all changes to the formatting (text made bold or italics, for example) as well as differences in the text.
Click on the down arrow next to the Merge button. You have three options for displaying the changes:

**Merge**
- Word displays the changes in the second document, i.e. the one you navigated to and selected.

**Merge into current document**
- Word displays the changes in the first, open document.

**Merge into new document**
- Word displays the changes in a new document leaving the existing documents untouched.

Whichever option you select, the differences will appear as tracked changes:

![Character size example](image)

You can now work through the changes deciding whether to accept or reject them.

**Note:** With Merge, it makes little or no difference to the tracking markup whether you start with the original or revised document, or which option you select to display the changes, or even whether there were already tracked changes in one of the documents.

**Merging changes from several reviewers**
If you have received files from several reviewers, you can merge all the changes into a single document:

- Open your original document.

- In the **Compare and Merge Documents** dialog box, select the first document with changes. Click on the down arrow at Merge and select **Merge into current document**.

- Repeat the process with the next document. Each reviewer’s changes display in a different colour.

If there are formatting as well as text changes, you will receive a warning message:

![Warning message](image)

Word can only save one set of formatting changes at a time. You have the choice of keeping the changes from the open document or from the one you are currently merging.

If you select the **Your document** option, Word will keep the formatting changes from the document that’s open, but will also merge in changes from the second document, as long as the change is to different text.

If you select the **The other document** option, Word will still keep the formatting changes in the open document, unless the same text has been formatted differently in the second document. In this case the formatting from the second document will override the formatting in the open document. Where this has happened, you will see ‘Not formatting’ in the balloon, as in the example below:
You will need to pay special attention to formatting changes as you go through the document accepting or rejecting changes. If you reject a change that has an override, it will revert to the previous change, BUT that previous change will be accepted. In the example above, the first reviewer changed the font to bold and the second reviewer to italics. If the change is rejected, the font becomes bold. However, there is no option to reject the bold formatting change as well.

**Note:** To make sure you get the best results from the merge, select **Tools – Options.** Click on the **Security** tab and check that **Store random number to improve merge accuracy** is selected.

### Comparing documents with legal blackline

The **Compare and Merge Documents** dialog box includes an option to compare two documents using ‘legal blackline’. This was introduced to meet the requirements of law firms to track all versions without changing the original documents. With this option, the originals remain untouched, and the changes can only be displayed in a new document.

1. Open one of the documents and select **Tools – Compare and Merge Documents.**
2. Navigate to and select the second document.
3. Click the **Legal blackline** checkbox. The **Merge** button changes to a **Compare** button:

   ![Compare and Merge Documents Dialogue Box](image)

4. Click **Compare** to create a new document containing the changes. Note that when you use Compare, the tracked changes do not include the reviewer details. This is removed and replaced with the generic **‘Author’.**

**Note:** The Compare function treats the open document as the newer one. This means that text that’s only in the open document will appear as inserted text, and text that’s only in the document you’re comparing it with will be marked as a deletion. To make the editorial process easier, start the Compare from the document containing the revisions rather than from the original.

If one or both of the original documents contain tracked changes, you will receive a warning message:

![Warning Message](image)

If you click **Yes,** Word will consider the changes to have been accepted before going ahead with the comparison. Since the accepted change might not be what you want, it is better to go through the tracked changes accepting or rejecting them first, before you compare the documents.

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When you have compared an original document with an edited version, save the final version with a name that helps identify it as the final version. For example, *report.final.doc* is more useful than *report_v3.doc.*

### Comparing side by side

If you find the Compare and Merge function too confusing, or track changes too difficult to work with, you can simply display two documents side by side on the screen and scroll through them together looking for changes by eye only.

1. Open the documents you want to compare. To avoid any confusion, close any other documents.
In either document, click on **Window** on the menu bar and choose **Compare Side by Side with**. The name of the other document appears as part of the menu option.

**Note:** If you do have more than two documents open, you will be prompted to choose the document you want to compare. If you only have one document open, the **Compare Side by Side with** menu option is disabled.

Word arranges the documents side by side at the same Zoom settings. If you change the Zoom setting on one document, the other will change as well.

You will also see a **Compare Side by Side** toolbar:

- The **Synchronous scrolling** button should be activated by default. When this is active, you can use the scroll bar on either document to move both documents together.

- To scroll a document individually, for example, to realign the documents if a large amount of text has been inserted in one, click on the button to deactivate, line up the documents then click on the button again.

**Note:** If you resize or move the document windows, you can use the **Reset Window Position** button to return them to their original position.

- To finish, click **Close Side by Side**.