Reviewing documents with track changes in Word 2013

This note covers how to use Word’s reviewing tools to track the changes made to a document. It also looks at comparing document versions and combining documents containing revisions.

What is ‘track changes’?

Track changes is a way to easily see the revisions you or others have made to a document. You can then choose to accept or reject them. It can be particularly useful if you need to manage changes made by several reviewers.

You will find the reviewing and tracking tools on the Review tab.

Editing with track changes

To turn track changes on, click on the Review tab and on the top half of the Track Changes button. Track changes is active when the button is highlighted. You can also click Track Changes on the status bar at the bottom of the screen. (If you can’t see this on the status bar, right-click on the bar and select Track Changes from the menu.)

To turn tracking off, click the button or the option on the status bar again.

Word uses ‘markup’ to show revisions. The initial Tracking view is Simple Markup. (See Tracking views below.) Note however, that Word will retain the last view you selected between sessions.

In this view, a red vertical line in the left margin indicates where the change has occurred.

A balloon on the right indicates a comment.

If you require this document in an alternative format, such as larger print, please email is.skills@ed.ac.uk.
To see the change, click on the line or the balloon. Word switches to All Markup view.

The changes appear as coloured revision marks. If there are several reviewers, each reviewer’s edits appear in a different colour. The colour is controlled by Word – you can’t allocate a specific colour to a reviewer, and it will also change from machine to machine. Formatting changes and comments appear in balloons on the right.

Rolling your cursor over the markup or the balloon displays a screen tip with more information, including the reviewer’s name and date and time of the revision.

Adding comments

You can insert annotations in the form of comments. To add a comment, highlight the text or place your cursor where it is to appear and click New Comment in the Comments group. Type your text and click Close. You can edit the content by clicking on the balloon.

If a comment is too big to display in the margin, click to display the full text in a scrollable box.

To delete a comment, click on it and on Delete. You can also click Reject in the Changes group.

Responding to a comment

If you want to respond to a reviewer’s comment you can add a reply. You can do this by opening the comment and clicking the Reply button or New Comment.

Tracking views

You can show tracking in different ways. In the Tracking group, click on the down arrow at Display for Review.

Simple Markup The default setting. Edits are indicated by a vertical red line. This is the ‘final’ version, i.e. how the document will look if you accept the change.

All Markup This displays the final version with the markup. Insertions show as underlining, deletions as strikethrough. Formatting changes appear in the text and in the margin.
**No Markup**  
This is the final version without markup. Note that this does NOT remove changes, it merely hides them. They remain in the document until you accept or reject them.

**Original**  
This shows the original text without the markup. As with **No Markup**, the changes are still in the document.

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**Note**: If you delete an item that contains automatic numbering, such as a caption or a footnote, the numbering for remaining items will appear to be wrong in the tracking views. This is because, although the item is marked for deletion, it still exists in the text. If you accept the deletion, footnotes will renumber automatically. Captions, however, need to be updated. The easiest way to do this is to use [Ctrl] and [A] to select everything in the document, then press [F9] to update the fields.

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**Track changes options**

Tracked changes can make a document very confusing and difficult to read, particularly if there are edits from several reviewers. To make it easier, you can display a specific type of revision at a time – just formatting changes, for example, or the edits made by a particular reviewer.

In the **Tracking** group, click on **Show Markup**.

Click the options to select or deselect. **Ink** refers to a tool available on tablet PCs.

You can also choose when to display balloons. You can show all revisions in balloons, all revisions within the text (inline), or just show formatting changes and comments in balloons (the default).

If you are dealing with edits from multiple reviewers, move to **Specific People** to select and deselect names.

It is possible to modify how changes appear – for example, show insertions as bold rather than underlined. In the **Tracking** group, click on the dialog box launcher to display **Track Changes Options** and click **Advanced Options**.

As well as specifying how markup is shown, you can set the width of the margin for the balloons to display in. Note that this does not affect your document width. You can also force Word to automatically print markup in landscape format by setting **Paper orientation in printing** rather than to have to set the orientation manually through the **Print** options.
Using the Reviewing Pane

As well as showing changes in the text, you can also display them in a Reviewing Pane. Click on Reviewing Pane in the Tracking group to display the pane vertically or horizontally.

The pane displays the total number of revisions at the top. Click on the arrow to show or hide the number of revisions for each type.

Double-click on an entry to move directly to the revision in the text.

Accepting and rejecting changes

To remove tracked changes, you must accept or reject them. They will remain in the document until you do, even if you can’t see them.

To accept or reject a change, click on the markup or in the balloon and on Accept or Reject in the Changes group. You can also right-click on the change and choose from the menu.

To move through the changes one-by-one, click on Previous and Next. You can also click on the down arrow at Accept or Reject and choose Accept and Move to Next or Reject and Move to Next.

Note that some amendments count as two separate changes. For example, replacing one word with another is both a deletion and an insertion. You have to accept or reject both for the markup to be removed.

When you have accepted or reject all the changes, Word displays the message ‘The document contains no comments or tracked changes’.

To accept or reject all the changes at once, click on the down arrow and choose Accept All Changes or Reject All Changes. You can also choose the option to stop tracking once all changes have been accepted or rejected.
Printing tracked changes

By default, Word will print out your document with the markup. To prevent this, click on the File tab and on Print. Click on the down arrow at Print All Pages, and under Document Info, deselect Print Markup. The document will print in its final or original form as set in Display for Review. If you have selected the options No Markup or Original, then Print Markup is deselected automatically.

You can also print just the markup without the document text. Click on the down arrow at Print All Pages and click List of Markup. To print the document text again, click on List of Markup and choose Print All Pages.

Copying text containing tracked changes

To copy text without copying the changes:

In the source document, turn track changes on and copy the text.

In the destination document, make sure track changes is turned off, then paste. Revisions will be pasted as if they had been accepted. Note that comments will be copied although revisions are not.

To copy text with the changes:

In the source document, turn track changes off and copy.

In the destination document, make sure track changes is off, then paste. The markup is copied over. Turn track changes on to continue reviewing.

Track changes and security

The most important thing to remember about tracked changes is that they remain in a document until they are accepted or rejected. If they have been hidden by setting Display for Review to No Markup, you may be unaware that they are there.
Word contains a security option that ensures that tracked changes are displayed when a document is opened. However, this may have been turned off. To check, click on the File tab and Options. In Word Options, click on Trust Center and on the Trust Center Settings button, then select Privacy Options. Under Document-specific settings, make sure Make hidden markup visible when opening or saving is selected.

Another option worth switching on is Warn before printing, saving or sending a file that contains tracked changes or comments. This is not normally on by default.

A quick way to check for revisions is to click on the Review tab, and in the Changes group, click on Next (you don’t need to switch on Track Changes). Word will put the document into All Markup view. To continue editing you will have to switch on tracking.

**Setting editing restrictions**

If you are sending a document out for review, you can force reviewers to use tracked changes.

A quick way is to click on the down arrow at Track Changes and select Lock Tracking to set up a password. To stop locking, click Lock Tracking and enter the password again.

Another method is to click on Restrict Editing in the Protect group. Under Editing restrictions, select Allow only this type of editing in the document. Select Tracked changes from the drop-down list, then click on Yes, Start Enforcing Protection. It’s a good idea to set a password – if you don’t, someone who knows how to use this feature will be able to turn off the protection.

When you send the document, reviewers will be unable to switch tracking off or use the tracking tools.

When you get the document back from a reviewer, click on Restrict Editing and on Stop Protection so that you can deal with the changes.

**Using the Document Inspector**

If you want to leave tracked changes in a document, but don’t want to display personal data such as reviewers’ names, you can remove the name of the author and the date and time the revision was made by using the Document Inspector.

髻 It’s a good idea to save a copy of the document before using the Document Inspector – it is not always possible to restore the information removed.

Click on the File tab and on the Info window, click on Check for Issues and select Inspect Document. Click on Inspect. Click the Remove All button at Document Properties and Personal Information. The date and time is removed from the screen tip and the reviewer’s name appears as ‘Author’.
Comparing and combining documents

If you want to compare different versions of a document, or you have received edited versions from multiple reviewers, you can use Compare and Combine to find out what has been changed.

**Compare**

This option allows you to compare two documents. For example, you might have a document with the same name in two locations and need to know if they are different. Alternatively, you might have received an edited version of a document from a reviewer who has not used track changes and want to see what has been changed.

**Combine**

Use this option when you have multiple versions edited by different reviewers. This allows you to bring all the revisions together to see who changed what.

Using Compare

To compare two versions, click on Compare on the Review tab and choose Compare to display the Compare Documents dialog box.

Open the original and revised versions of the document.

The reviewer or author’s name is displayed in Label changes with. You can overtype this if you wish. Note that if this appears as ‘Author’, personal information has been removed (see Using the Document Inspector above).

You can choose which revisions to display under Comparison settings. (If you can’t see this, click More.) You might not want to display specific elements – comments, for example, or formatting. Insertions and deletions are always shown.

Under Show changes in, select the document to be marked up. The first time you open Compare Documents, this will be set to New document.

Tip: Although it is possible to remove revisions through the Document Inspector (Comments, Revisions, Versions and Annotations), the Remove All button is too drastic. It does not give you an option to accept or reject (it is accept only). It’s better to use the tracking tools on the Review tab.
The options you set in **Comparison settings** and **Show changes** become the default options for the next time you use Compare.

If one of the documents being compared includes tracked changes, Word displays a message when you click **OK** to say these will be **accepted** before the comparison is done.

Word displays the document in **All Markup** view. You can now accept or reject the changes. Note that it is not necessary to turn Track Changes on to do this.

**Using Combine**

Combining the changes from multiple versions works in a similar way to Compare.

Click on **Compare** and select **Combine**. Open the original version and the first revised version. Under **Show changes in**, select **New document** and click **OK**. Save this new document before continuing.

Click on **Compare** and select **Combine** again. In **Original version**, open the newly saved document and in **Revised version**, the next version to be combined. This time select **Original document** under **Show changes in** and click **OK**. The document now has the changes from both reviewers.

Save the document with the same name and repeat for any other versions you want to combine.