Getting to grips with tracking changes

When I became a science editor, I discovered the 'track changes' function in MS Word, along with lots of other things such as templates and styles. At that time I was using Word 97 or 2000, and track changes was quite simple—tracking was either on or off, and changes were either shown or hidden.

With the advent of Word 2003, the track changes function was linked to the reviewing toolbar; I found this so complicated that I avoided using it for as long as possible. However, eventually all the computers at home and at work had Word 2003, so I had no choice but to work with the reviewing toolbar.

Once I got to grips with it, I found it wasn't so hard, and the many features of the tracking function are actually very useful; for example, I like being able to:
- work with comments visible (in balloons) and all other changes hidden
- use a shortcut to view or hide changes, and to turn tracking on or off
- quickly remove all the formatting changes
- view only the changes from specific reviewers.

The rest of this article explains these functions, and suggests ways to present an edited document to a client.

Working with comments only

Most clients like to have the editing changes tracked so, at the start of a job, I turn on the tracking. Because I find it impossible to work with the changes showing, I go into the reviewing bar, click on 'Show Markup' and untick 'Insertions and Deletions' and 'Formatting', which leaves only 'Comments' visible.

I set the comments to appear in balloons, because that makes it easy to see what comments I have made and where they are located.

Using shortcuts

I'm now using Word 2007, so I have added the tracking button and the comments button to my 'Quick Access Toolbar'. The tracking button allows me to see at a glance whether or not I have tracking turned on. The comments button lets me add a comment without having to remember where to go in Word 2007 to find it!

I also have *Editor's Toolkit* (available from the Editorium at www.editorium.com) as an add-in to Word; it's a set of macros that gives you shortcuts for various functions. With *Editor's Toolkit* installed, you can use a keyboard shortcut (the F2 key) to turn tracking on or off, and another (F4) to show or hide the tracking.

Removing formatting changes

Generally, clients are only interested in changes that involve insertions or deletions, and are happy not to see formatting changes. Turning tracking off when formatting and turning it back on when making more substantial changes is one option. However, this is a hassle, and it's all too easy to forget to turn tracking back on when you have finished making a formatting change and have returned to editing the text. To get round this problem and remove all the formatting changes in one fell swoop, I recommend the following steps:
1. Track everything as you are working.
2. When you have finished editing, go to the reviewing function, click on 'Show Markup' and untick everything except formatting, so that the only changes showing are the formatting ones.
3. Click the 'Accept' button and select 'Accept all Changes Shown' to accept (and thus remove) all the formatting changes.

When moving a paragraph of text, I specifically turn off track changes. This avoids the whole paragraph being marked as changed text, which would mask any editing within the paragraph. Instead, I add a comment noting that the paragraph has been moved.

View only changes from specific reviewers

When a client returns a file and has tracked their changes on top of yours, it can be difficult to see the client's changes, even though Word will have assigned a different colour for each reviewer.

There are two options for making it easy to see the changes from the client:
- Accept your changes:
    1. Go to 'Show Markup', click on 'Reviewers' and untick all the reviewers except for you.
    2. Click on 'Accept' and select 'Accept all Changes Shown' to accept (and remove) all your changes.
    3. Go back to Show Markup', click on 'Reviewers' and then on 'All reviewers', to see all the remaining changes (now that your changes have been accepted, any remaining changes will be from the client).
- Hide your changes:
    1. Go to 'Show Markup', click on 'Reviewers' and untick your name.
    2. The only changes visible will be those from the client. (The disadvantage of this approach is that if you have tracking turned on, and make further changes while going through the client's changes, all your changes will suddenly reappear).

Sending tracked documents to clients

Even though I track all insertions and deletions, I encourage clients to look at the edited document without the tracking visible. Extensive changes can look a bit alarming and they make the text difficult to read. With Word 2003, if a tracked document was emailed with changes hidden, it appeared that way when the recipient opened it.

However, with Word 2007, the changes in a tracked document show up whenever the document is opened, so sending a document with changes hidden is not an option. To overcome this, I save a second version of a tracked document, add 'accepted' to the file name and accept all the changes. I send both versions to the client and suggest they work from the 'accepted' version, only referring to the tracked version where necessary.

Conclusion

Tracking and review functions are versatile tools and well worth getting to know. However, if you find these functions confusing, or have a senior's moment and realise that you've been editing for hours with tracking turned off, there is an alternative. Simply use the 'Compare' function to compare your final edited version to the client's original text; this will produce a new version with all changes tracked.

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