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10+ tips for using Word's Track Changes feature for collaborative editing

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Editing is a tough job and not many of us do it well. Most likely, you'll want others to review important letters and reports to suggest changes and catch errors. Thanks to Word's Track Changes feature, keeping up with all those changes and comments is a relatively simple task.

Throughout the article, I use the terms author and editor generically. Author refers to the person responsible for updating the document. Editor is any person who reviews a document and makes changes or comments. Neither term is meant to imply professional status or position.

Note: This information is also available as a PDF download.

#1: Be your own editor

It might seem odd to record changes when you're the only person working with a document. But with Track Changes enabled, you can change your mind at anytime. Rejecting a change is a lot simpler than retyping, or worse, recreating a portion of your document.

#2: Check your settings

Track Changes identifies changes made by the current user. Before you start editing a document, check Word for the correct user information. To do so, choose Options from the Tools menu, and then click User Information. Change the name if necessary. If you don't, the feature might not work as expected.

Figure A
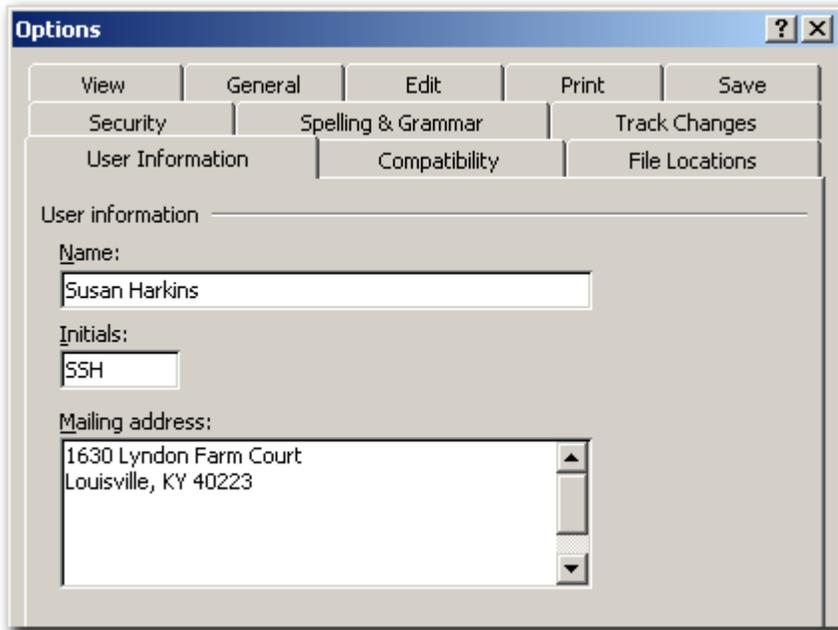
Update Word's user information.

#3: Save final edits

You might think it's efficient to accept and reject changes in the edited document. That's okay, but remember that doing so wipes out the document's editing history and commentary. Most likely, you'll want to keep a copy of the edits, at least for a while, so you can:

Track who changed what, when, and perhaps why
Reverse a change

Before you start accepting and rejecting changes and removing comments, save a copy of the edited version using an appropriate name.

#4: Create a version trail

Save a copy of the current version when you update a document that's already in use. If you update often, you might even come up with a numbering scheme that indicates each version's position in the editing trail. This step only seems unnecessary until you need something from several weeks or months ago. Combine this step with #3 to create a comprehensive editing process.

#5: Double-click TRK

Not every change has to be recorded. For instance, you might want to move a paragraph or change a static date in the text. You can quickly disable Track Changes by double-clicking TRK (on the Status bar). Make your change, and then double-click TRK to turn it back on. In addition, a quick glance at TRK will tell you whether Track Changes is on or off.

Figure B

Use TRK to toggle Track Changes.

#6: Inhibit balloons

In Web Layout and Print Layout view, Word displays deletions, additions, and comments in balloon-like placeholders. If you find them distracting, turn them off. To do so, choose Options from the Tools menu. Then, click Track Changes, choose Never from the Use Balloons (Print And Web Layout) drop-down list in the Balloons section, and then click OK.

Figure C
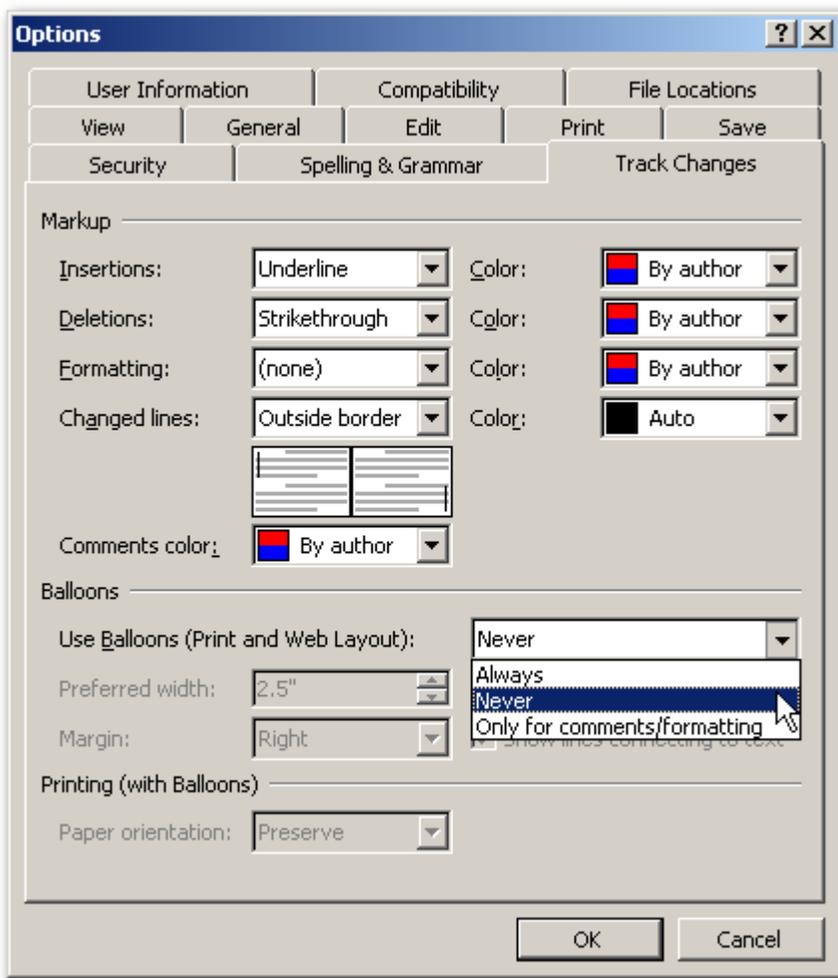
Turn off balloons.

#7: Use a different font for balloons

If you like balloons but hate the small font Word uses by default, change it. Follow these steps to change the font for balloons:

Choose Styles and Formatting from the Format menu to display the Styles And Formatting pane.
Choose Custom from the Show drop-down list (at the bottom of the pane).
Select the Balloon Text check box and click OK. You can also change the font for comments, but Comment Text won't be available until you insert a comment.
In the Pick Formatting To Apply section of the Styles And Formatting pane, click the Balloon Text drop-down list and choose Modify.
Click the Format button at the bottom of the dialog box and choose Font from the drop-down list.
Change the font and size and click OK.
If you want all subsequent documents to inherit the change, be sure to select the Add To Template check box just above the Format button.
Click OK.

#8: Use comments appropriately

When you want to ask a question or suggest something that the author may not accept, insert a comment. If you want to change the text, do so. If necessary, add a comment to explain why you made the change or include other meaningful information.

Don't use comments to suggest reasonable changes. Doing so only forces the author to type the change. That takes more time than rejecting or accepting your change.

#9: Recover untracked changes

If someone turns off Track Changes and alters the document, you'll have no idea what they changed. A word-by-word review is a tedious, if not hopeless, challenge. If this happens, choose Compare And Merge Documents from the Tools menu to generate a document with Track Changes enabled and with luck (keep your fingers crossed and chant your favorite technical mantra), you'll find the changes intact. Then, whack the editor's head.

Although the Compare And Merge Documents feature *might* come in handy in this situation, it can also be useless. Sometimes the generated document shows no changes at all. Good luck if this happens-and give the editor a second whack.

#10: Avoid highlights

Some editors like to highlight their changes. With Track Changes on, highlights are superfluous and create more work because the author has to remove them. In addition, a highlight might work its way into the production copy, which is never a good thing. If someone adds highlights, use the Find feature to find and delete the format.

#11: Keep editors from disabling Track Changes

If you want to be on the safe side, you can make sure editors don't turn off Track Changes for a document they're reviewing.

Once you're ready to distribute the document, enable Track Changes
Choose Protect Document from the Tools menu.
Select the Allow Only This Type Of Editing check box in the Editing Restrictions section

Choose Tracked Changes from the drop-down list.
Enter a password when prompted, confirm the password, and click OK.
Save the document and then distribute it.

The neat thing about this feature is that *you* can still turn Track Changes on and off as needed. Protecting your document with Track Changes cancels out the possibility of #9 and helps both you and your editors avoid headaches.

Figure D
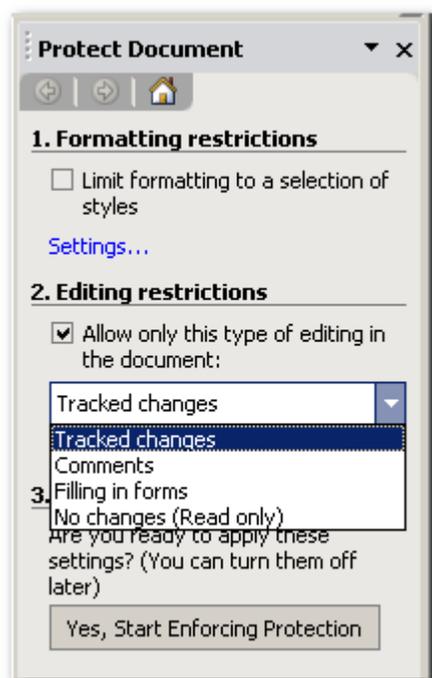
Protect your document with Track Changes enabled.

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