

HOW TO . . .

Track Changes in a Document



Overview

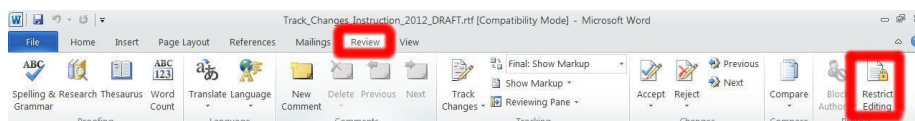
When editing a document, the Track Changes feature in Microsoft Word enables IRB reviewers to see the changes. When Track Changes is turned on, marks are inserted that show where deletions, insertions, and formatting changes have been made. They will stay in your document as recommendations until they are accepted or rejected. PLEASE NOTE: Turning off the Track Changes feature does not remove revisions or Comments that were already made.

Remove Restriction from Forms (How to Unlock)

The Track Changes feature will not function when documents are "restricted" or "protected" (locked). Some of our forms (not applications) are protected, but you may remove this protection easily, without the use of a password, so that track changes may be enabled.

To remove protection or restriction in a MICROSOFT WORD 2010 document:

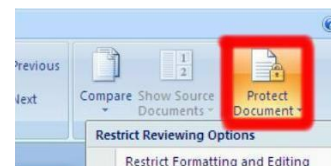
1. Click on the "Review" ribbon tab on the top menu.
2. Click "Restrict Editing" on the far right.
3. A panel will open on the right side. At the bottom, click the button.
4. To begin tracking, please see *How to Turn Track Changes On*, on page 2 (below).



NOTE: If you need to type into gray text boxes or place an "x" in check mark boxes, you'll need to enable restriction again. Click "Restrict Editing", "Yes, Start Enforcing Protection", and then click "Ok" in the popup. No password is required.

To remove protection or restriction in a MICROSOFT WORD 2007 document:

1. Click on the "Review" ribbon tab on the top menu.
2. On the top menu, at the far right, click on "Protect Document".
3. Select "Restrict Formatting and Editing".
4. A panel will open on the right side. At the bottom, click on the button.
5. To begin tracking, please see *How to Turn Track Changes On*, on page 2 (below).



NOTE: If you need to type into gray text boxes or place an "x" in check mark boxes, you'll need to enable protection again. Click "Protect Document", "Yes, Start Enforcing Protection", and then click "Ok" in the popup. No password is required.

Add the Track Changes Indicator to the Status Bar

When Track Changes is turned on, the button is highlighted. However, if another tab is accessed, it would be easier to tell if Track Changes is on if it is added to the status bar.

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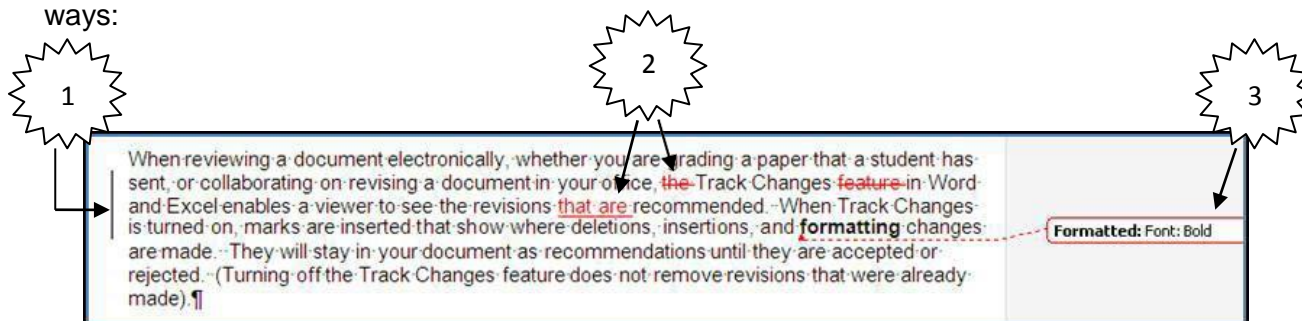
1. Right-click on the status bar below your document. The *Customize Status Bar* dialog box will display.
2. Left-click *Track Changes*.



NOTE: Click the *Track Changes* indicator on the status bar to turn the indicator on or off. To remove the *Track Changes* indicator from the status bar, right-click on a bare area of the status bar and left-click again to remove the checkmark from *Track Changes*.

Turn Track Changes On

1. On the **Review** tab in the **Tracking** group, click the top portion of the  button.
2. As text or graphics are inserted, deleted or moved, each change displays with a *markup*; marks such as colors and lines show where each revision is, what it is, and who made it. Changes will be seen three ways:




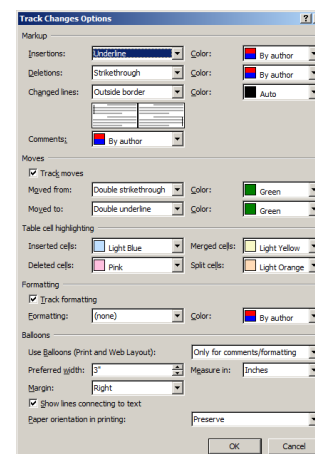
1. Vertical lines in the left margin to indicate that a change has been made in the line(s).
2. Inserted text in the document, by default, is underlined; deleted text in the document, by default, is crossed out (This can be changed; See Track Changes Options).
3. Text in a balloon in the margin; a dotted line to the changed text.

NOTE: Hover the mouse cursor over the changes to see who made the revisions and the date and time of the revisions.

Track Changes Options

To change options for tracking changes; for example, if you did not want to see deletions as a strike through, but have them change to the color red, follow these steps:

1. On the **Review** tab in the **Tracking** group, click the bottom part of the  button.
2. Select *Change Tracking Options*. A dialog box will open.
3. Make changes then click the **OK** button.



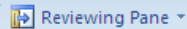
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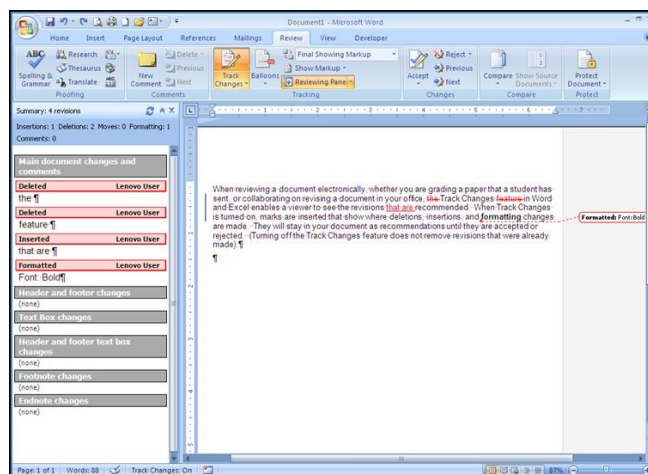
Track Changes in a Document




Add a Reviewing Pane

The *Reviewing Pane* will show revisions in a separate window either horizontally or vertically. This is a good tool for ensuring that all tracked changes have been removed from your document and won't show up to others who might view your document. It will also enable you to read long comments that do not fit within a comment balloon.

1. Click the **Review** tab.
2. In the **Tracking** group, click arrow on the  button. Choose horizontal or vertical. At the top of the *Reviewing Pane* you will be able to see a summary of the revisions.



Turn Track Changes Off

1. Click the **Review** tab.
2. In the **Tracking** group click the top of the  button.

Turning *Track Changes* off does *not* delete tracked changes or comments. All tracked changes already made up to that point will stay in your document. However, any revisions you go on to make will not be marked as revisions.

NOTE: To remove the markup presently on the document, you must accept or reject the markup as shown in the next section.

Remove Markups (Only after IRB or ERC Review)

To remove markups (changes), they must be accepted or rejected. Even hidden changes will appear to viewers in a document if you send it without accepting or rejecting the changes. Watch for the message at the end of the document telling you that there are no more tracked changes or comments.




1. Click the **Review** tab.
2. In the **Changes** group, click the bottom part of the appropriate button as described below.
 - a. *Accept* changes one at a time or *Accept All* to accept all changes at one time.
 - b. *Reject* changes one at a time or *Reject All* to reject all changes at one time.
 - c. *Previous* – review each item one at a time going toward the beginning of the document.
 - d. *Next* – review each item one at a time going toward the end of the document.

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Show a Particular Markup

1. Click the **Review** tab.
2. In the **Tracking** group, click the  button.
3. Click to enter or remove a checkmark for your preferences.

NOTE: If there are several reviewers of the document and you only wish to view the markups made by one reviewer, hover over *Reviewers* and in the sub menu click to deselect *All Reviewers*. Then click to select the reviewer of your choice. Clearing the check boxes does not delete the markup, it just temporarily hides them.

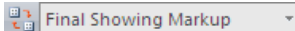
Balloons

Changes can be viewed in different ways.

1. Click the **Review** tab.
2. In the **Tracking** group, click the  button and select *Balloons*.
3. Click to enter or remove a checkmark for your preferences.


Final or Original

When a document may have lots of revisions, to see what it looked like before it was marked up, or what it would look like if you accepted or rejected all of the changes and comments follow these steps:

1. Click the **Review** tab.
2. In the **Tracking** group, click the arrow to the right of the  button. Select the appropriate action as described below:
 - a. *Final Showing Markup* – display the tracked changes and comments.
 - b. *Final* – shows what the document would look like with all of the proposed changes included.
 - c. *Original Showing Markup* – shows the document before any changes were made plus the changes in balloons in the margin.
 - d. *Original* – shows the document before any changes were made.

Add Comments

You do not have to have *Track Changes* turned on in order to leave *Comments* in the document. *Comments* are included in a document to explain something or to leave a remark.

1. Place the cursor where you want to comment. Click the **Review** tab.
2. In the **Comments** group, click the  button. A comment balloon displays in the document margin.
3. Type your comments.


NOTE: The *Comment* balloon will have a solid color background with the label *Comment* and the reviewer's initials in the balloon and a number indicating how many comments are in the document.

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Track Changes in a Document



Change User Name or Initials

1. Click the **Review** tab.
2. In the **Tracking** group, click the bottom part of the  button.
3. Select **Change User Name**.
4. Under *Personalize your copy of Office*, change the name or initials that you want to use in your own comments.


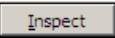
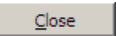
NOTE: Any changes you make will affect other Office programs. Changes made will affect comments going forward. Any comments that may already be in the document will not be affected.

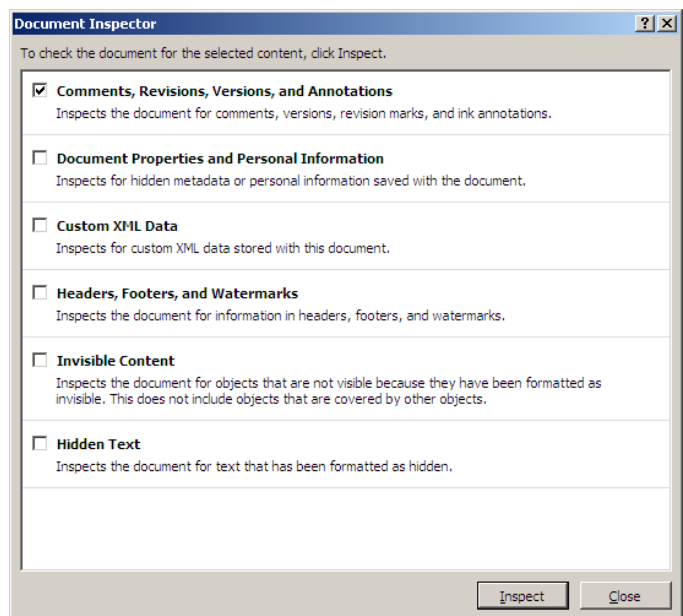
Delete a Comment

To delete a comment, right-click on the comment and select *Delete Comment*.

Document Inspector

A feature called *Document Inspector* allows you to check a document for tracked changes, comments, hidden text and other personal information.

1. Click the **File** tab.
2. On the *Info* panel click the  button.
3. Click or select *Inspect Document*.
4. Select or deselect checkboxes.
5. In the *Document Inspector* dialog box, click the  button.
6. Review the inspection results. If Document Inspector finds comments and tracked changes, you are prompted to click *Remove All* next to *Comments, Revisions, Versions, and Annotations*.
7. Click the  button.



For further instruction on Microsoft Word's features, please contact Marywood's User Support Services at helpdesk@marywood.edu or (570) 340-6070.