HOUR 18

Collaborating on Documents

In today's office environments, people are increasingly abandoning red ink pens, highlighters, and post-it slips in favor of software tools that enable them to collaborate on documents without printing them out. For example, you can write the rough draft of a document in Word and send it to a colleague for review. Your colleague edits the document onscreen and then sends it to a second person, who adds more revisions before e-mailing the document back to you. After you receive the edited copy, you incorporate your colleagues' suggestions and finalize the document. In this hour, you learn how to use Word's collaboration tools and a few related features that come in handy when working on documents with other people. When you arrive at the sections on inserting comments and tracking changes to a document, keep in mind that Word uses the term markup to refer collectively to both of these features.

The highlights of this hour include

- Using the highlighter to call attention to text
- Inserting comments in a document
- Tracking the changes made to a document
- Protecting your document from revisions
- Saving multiple versions of a document
- Ensuring that your Word documents are compatible with older versions of Word

Using the Highlighter

Word's highlight feature lets you mark up your document onscreen just as you would use a highlighter pen to mark up a printed document. Highlighting is designed for use on documents that you'll edit onscreen, but it will also print out. If you don't have a color printer, highlighting prints in a shade of gray.

To use the highlighter, follow these steps:

1. Click the down arrow to the right of the Highlight button on the Formatting toolbar, and click the color that you want to use in the palette that appears (see Figure 18.1).

FIGURE 18.1
You can choose among many highlighter colors.
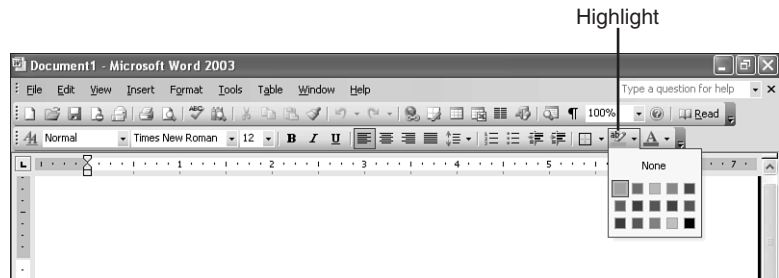
2. The I-beam takes on the shape of a highlighter pen. Drag across the text that you want to highlight, and then release the mouse button.

3. The text is now highlighted with the color you chose (see Figure 18.2). Highlight any other text you like, and then click the Highlight button again to turn the feature off.

FIGURE 18.2
Highlight text to call attention to it.
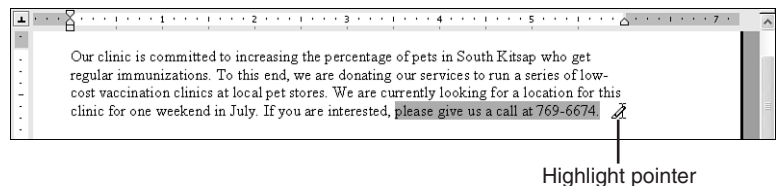
The Highlight button shows the color that you most recently selected from the palette. If you want to use that color, click the button itself in step 1 instead of choosing a color in the palette.

Another way to apply highlighting is to select the text and then click the Highlight button (or display the palette and choose a different highlight color).

To remove highlighting, select the text, display the Highlight palette, and choose None.

Working with Comments

You may, at times, want to write notes in a document (either to yourself or to other people) that don't print out. Word's Comment feature lets you add comments that reference particular blocks of text and track comments from multiple people. Furthermore, each person's comments appear in a different color, which makes them easy to differentiate onscreen.

If you work extensively with comments, you'll appreciate the buttons in the Reviewing toolbar (choose View, Toolbars, Reviewing), shown in Figure 18.3.

FIGURE 18.3

The Reviewing toolbar contains buttons for working with comments.
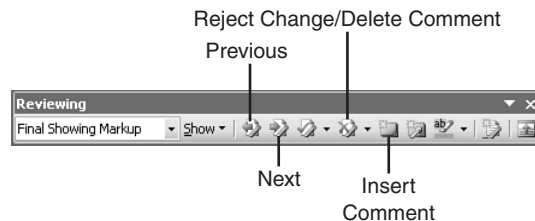

Using Print Layout View

The comments feature behaves differently depending on whether you're in Print Layout or Normal view. These steps for inserting a comment assume you are using Print Layout view:

1. Select the text that you want to comment on.

2. Click the **Insert Comment** button in the Reviewing toolbar. (You can also choose Insert, Comment or press Alt+Ctrl+M.)

3. Word highlights the text you selected and creates a balloon to the right of the document text that includes a reference mark. The reference mark is made up of the word *Comment*, your initials, and a sequential number (each person's comments are numbered sequentially). Type your comment in the balloon (see Figure 18.4).

FIGURE 18.4

Type your comment in the balloon.
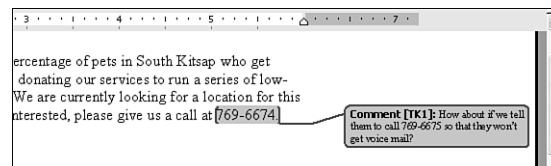
4. Click in the document text when you are done. You may also need to use the horizontal scroll bar to scroll the left edge of your document back into view.

After you finish the comment, the text you selected remains highlighted and enclosed in thin colored brackets to indicate that there is a comment about it. A dotted line runs from the highlighted text to the balloon. To read the comment, you can read the contents of the balloon or simply rest the mouse pointer over the highlighted text. In a moment, a ScreenTip appears with the name of the person who wrote the comment and the comment itself (see Figure 18.5).
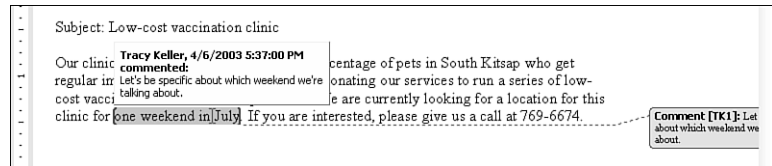
To move from one comment to the next in a document, click the Next and Previous buttons in the Reviewing toolbar. If your document also includes tracked changes and you don't want to stop at each tracked change, click the Show button in the Reviewing toolbar and clear the check mark next to Insertions and Deletions to temporarily hide tracked changes from view.

To edit a comment, click in the balloon and revise the text. (If you right-click the highlighted text of any comment and choose Edit Comment in the context menu, Word places the insertion point in the associated balloon.)

To delete a comment, click either the highlighted text or the balloon and click the Reject Change/Delete Comment button on the Reviewing toolbar (or right-click the highlighted text or balloon and choose Delete Comment from the context menu). If you want to delete all the comments in your document, click the down arrow to the right of the Reject Change/Delete Comment button and choose Delete All Comments in Document.

If you want to temporarily hide the highlights in the text and the balloons from view to get a clean view of your document, click the Show button in the Reviewing toolbar and click Comments in the menu that appears to clear its check mark.

Using Normal View

If you are using Normal view, clicking the Insert Comment button on the Reviewing toolbar opens the Reviewing pane at the bottom of the Word window (see Figure 18.6) and inserts a header for your comment. After you've typed your text, click the Reviewing Pane button in the Reviewing toolbar to close the pane. By the same token, when you

right-click highlighted text and choose Edit Comment in the context menu, Word opens the Reviewing pane and places your insertion point in the appropriate comment text. You'll also notice that in Normal view the reference mark appears in the document text immediately after the highlighted text.

Reviewing pane   Reviewing pane

FIGURE 18.6
When you're using Normal view, you enter comments in the Reviewing pane.
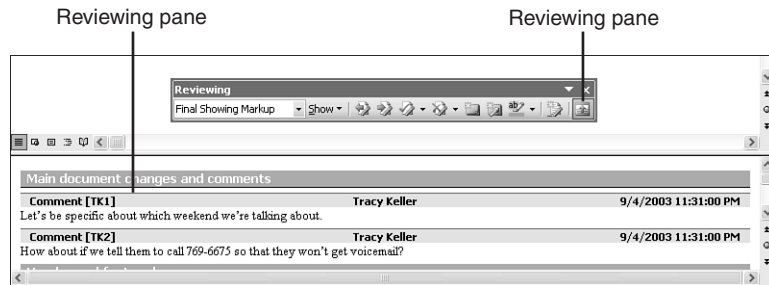
Tip: Some people find the balloons distracting. If you would prefer to always use the Reviewing pane instead of balloons, even when you're using Print Layout view, click the Show button in the Reviewing toolbar and point to Balloons. In the submenu that appears, choose Never.

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Tracking Changes to a Document

The cornerstone of Word's collaboration features is *track changes*. This feature lets you track the revisions (insertions, deletions, and some formatting changes) that are made to a document. When the feature is turned on, any text you insert in the document is displayed in color with an underline, or off to the side in a "balloon," depending on the view you're using. Text you delete is shown in color with strikethrough, or off to the side in a balloon. If more than one person edits a document, each person's changes show up in a different color. When you are ready to finalize a document, you can go through and accept or reject each tracked change. Accepting changes will remove any deleted text and incorporate any additions into the original document. Rejecting changes reverts your document to the original text. You can accept and reject each change independently or all changes at one time with or without reviewing each one individually.

As you work with tracked changes, you will use the buttons in the Reviewing toolbar, shown in Figure 18.7.
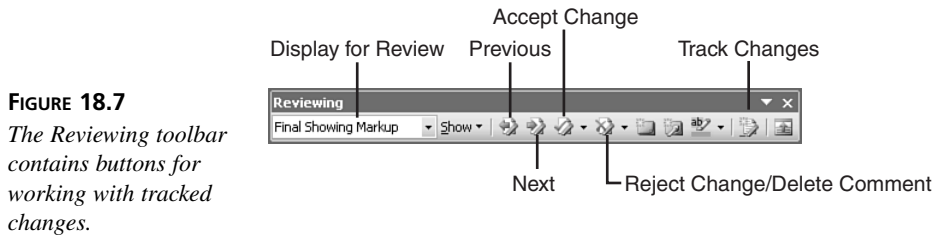
Tracking Your Changes

To turn track changes on or off, click the Track Changes button in the Reviewing toolbar (or Tools, Track Changes). The TRK indicator in the status bar at the bottom of the Word window is dark when track changes is turned on. (You can also double-click the TRK indicator to toggle this feature on and off.)

After you've turned on track changes, revise your text as you normally do. If you're using Print Layout view, inserted text will be colored and underlined, and deleted text will be removed from the text stream and placed in a balloon to the right of the document. (This description assumes you have selected the default setting for displaying markup—Final Showing Markup. You'll learn more about this setting later in this section.) If more than one person has edited a document and you want to see who made a particular change, rest your mouse pointer over the revision (either inserted text in the text stream or deleted text in a balloon). A ScreenTip appears that lists the name of the person who made the edit and the date on which it was made (see Figure 18.8).
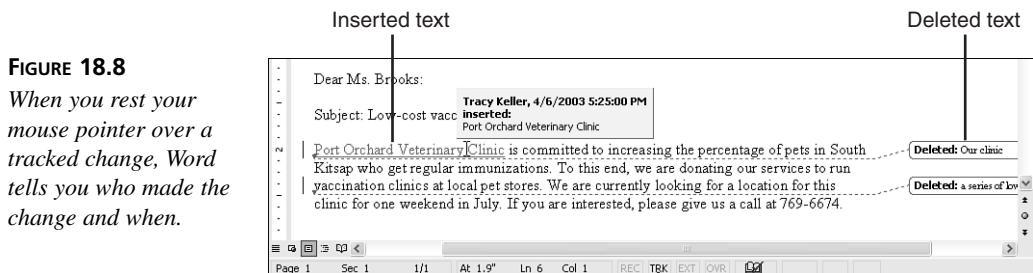
One of the most useful parts of the track changes feature is the Display for Review drop-down list in the Reviewing toolbar, which provides four different views of the revisions that have been made to your document:

- Final Showing Markup—Shows tracked changes and comments. Puts the insertions in the text stream and the deletions in balloons. This option (the default) is a good one for editors to use because it shows you the document in its revised state.

- Final—Hides tracked changes and comments. Shows the document as it will appear if you accept all the changes. This option is a good one to use when you're ready to proofread your document before finalizing it.

- Original Showing Markup—Shows tracked changes and comments. Puts the deletions in the text stream and the insertions in balloons. This option is a good one for authors because it enables them to focus on what changes people have made to their original text.

- Original—Hides tracked changes and comments. Shows the document as it was before it was edited.

Figure 18.9 shows the same text as you saw in Figure 18.8, but the Final option is chosen instead of Final Showing Markup. Choosing Final (or Original) does not turn off the track changes feature; it merely hides the changes. If you like, you can edit the document while changes are hidden, and Word continues to track your edits. When you next choose Final Showing Markup or Original Showing Markup, you will see all the revisions you have made, both those you made when changes were visible and those you made when they were hidden.

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FIGURE 18.9

Hiding tracked changes by choosing Final is a great way to see how the text would read if the changes were all accepted.
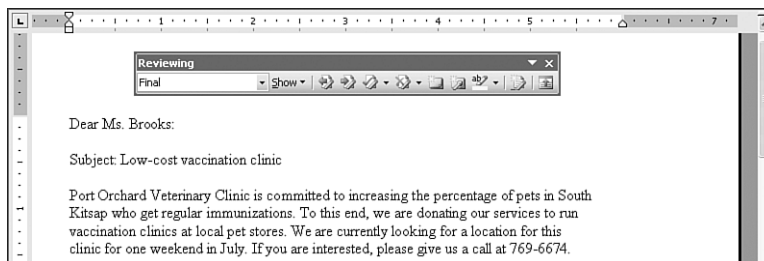
As with comments, you can temporarily hide all insertions and deletions from view by clicking the Show button and then clicking Insertions and Deletions in the menu that appears. If you do this while Final Showing Markup is selected in the Display While Reviewing drop-down list, the text will appear as it would if you chose Final. By the same token, Original and Original Showing Markup would appear the same. (Of course, if your document also contains comments and Comments is still marked in the Show menu, you will see your comments when you choose Final Showing Markup or Original Showing Markup.)

If you are using Normal view, or if you have turned off the balloons feature, both your insertions and deletions will appear in the text stream (see Figure 18.10).

FIGURE 18.10
When you're using Normal view or have turned off the balloon feature, insertions and deletions both appear in the text.
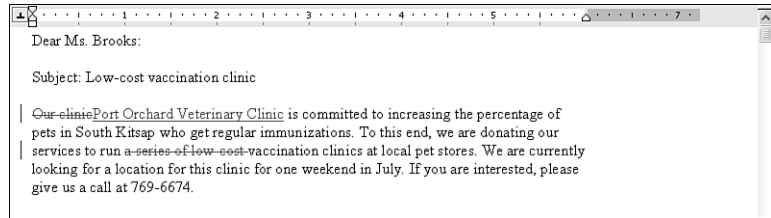
In this situation, the Final Showing Markup and Original Showing Markup display options are identical.

> When you turn track changes on, Word tracks who made what formatting changes as well as changes to the document text, but by default it hides the markup for formatting changes from view. To display formatting change markup, click the Show button in the Reviewing toolbar and choose Formatting.

Understanding the Colors of Tracked Changes

By default, Word assigns a different color to each person (*author*) who edits a document. To see how this works, choose Tools, Options to display the Options dialog box and click the Track Changes tab (see Figure 18.11).

FIGURE 18.11
The Track Changes tab of the Options dialog box lets you change the settings for track changes.

For the colors to work properly, you have to use the default setting of By Author in the Color lists for Insertions and Deletions. You can't choose a particular color for your revisions; when you edit a document with track changes turned on, Word assigns you the next available color in its color palette. If you choose a specific color in the Color lists, all authors' edits will appear in that color, which pretty much defeats the purpose of using track changes.

Helping Word Recognize Different Authors

Word recognizes the different authors who work on a document by checking the name that's listed in the Name text box in the User Information tab of the Options dialog box (Tools, Options), as shown in Figure 18.12.

FIGURE **18.12**
Make sure your user information is current before using track changes.

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Before you use track changes, you should check the User Information tab and make sure that your name is entered correctly. If it isn't and you revise a document with track changes turned on, other people who review the document after you will assume that your edits were made by whoever happens to be listed in the User Information tab.

If you edit a document on a computer where you don't have an account, Word will assume the changes were made by the person whose account you were borrowing. To avoid this situation, you need to update the User Information tab before editing the document. But don't forget to set it back when you are done!

In some cases, you may need to edit a document twice. If you want your edits on separate passes to appear in different colors, change the name in the User Information tab before you begin your second pass. For example, you could enter *Tina Larson (first pass)* in the User Information tab before beginning your first pass and then change it to *Tina Larson (second pass)* before beginning your second pass.

Accepting and Rejecting Tracked Changes

When you have finished editing a document with track changes, you need to go through and decide whether to accept or reject each of the revisions. If you accept an insertion, the inserted text becomes part of the document. If you accept a deletion, the text is removed.

Follow these steps to accept or reject the changes in a document:

1. Press **Ctrl+Home** to move to the top of the document.
2. Click the **Next** button in the Reviewing toolbar to find and select the next change. If your document also includes comments and you don't want to stop at each comment, click the Show button in the Reviewing toolbar and clear the check mark next to Comments to temporarily hide comments from view. Similarly, you should clear the check box next to Formatting in the Show menu if you don't want Word to stop at formatting changes.
3. Click the **Accept Change** or **Reject Change/Delete Comment** toolbar button.
4. Click **Next Change** again, and continue accepting or rejecting changes until Word informs you that it found no tracked changes in the document.

You can also review changes in the Reviewing pane. Follow the preceding steps, but after step 1, click the Reviewing Pane button in the Reviewing toolbar and click in the Reviewing pane to activate it. Then continue with the remaining steps. An advantage of using the Reviewing pane is that it lists the author and date of each change.

You can accept all the changes in the document by clicking the down arrow to the right of the Accept Change button and choosing Accept All Changes in Document. Or, if you've used the Show button to hide formatting changes or insertions and deletions, you can choose Accept All Changes Shown to accept only those changes that are currently shown. To use the two equivalent options for rejecting changes, click the down arrow to the right of the Reject Change/Delete Comment button and choose Reject All Changes in Document or Reject All Changes Shown.

Remembering to Finalize Your Document

If you have hidden tracked changes or comments, it's pretty easy to forget that they are there and assume that your document has already been finalized. Sending out a document that contains markup when you thought it was finalized can cause great embarrassment

or, in the worse cases, breaches in confidentiality or security. Word helps prevent these problems in two ways.

First, by default Word shows hidden markup every time you open a document to remind you that it's there. Second, Word can warn you before you print, save, or send a file that contains markup. (This option is turned off by default.) Note that Word only warns you when you save if you have edited or formatted the document since your last save. And it only warns you about e-mailing the document if you send it from within Word (see Hour 22, "Using Word for E-mail"). (At the time of this writing, if you marked the check box labeled Make Hidden Markup Visible When Opening or Saving, Word only made hidden markup visible when you opened a document, not when you saved it.)

If you want enable or disable either of these features, choose Tools, Options to display the Options dialog box. Click the Security tab, and mark or clear the check box labeled Make Hidden Markup Visible When Opening or Saving or the check box labeled Warn Before Printing, Saving or Sending a File That Contains Tracked Changes or Comments.

Protecting Documents from Being Opened or Modified

You might want to require a password to enable people to open and/or modify your document (or template). For example, there may be a group of people that you want to be able to open and read your document, and within that group, a few people that you want to be able to actually modify the document. If you require a password to open your document, Word encrypts the file and decrypts it only when the user enters the correct password. If you require a password to modify your document, anyone can open and edit your document, but they can't overwrite the original document with their revised version. Instead, they are required to save the edited document under a different name and/or location. Only users who enter the correct password can overwrite the original with a modified version. You can use just one of these types of passwords on a document or use them both together.

To protect your document from being opened and/or modified, follow these steps:

1. With the document onscreen, choose **File**, **Save As**.

2. Click the **Tools** button at the top of the Save As dialog box, and click **Security Options**.

3. In the Security dialog box (see Figure 18.13), type a password in the **Password to Open** and/or **Password to Modify** text box. Passwords can be up to 15 characters long, and they are case sensitive. If you are requiring a password to open the document, you can select among a range of encryption types. To do so, click the

Advanced button. If you aren't sure what type of encryption to use, check with your system administrator.

Type a password up to 15 characters long in the Password to Open and/or Password to Modify text box.
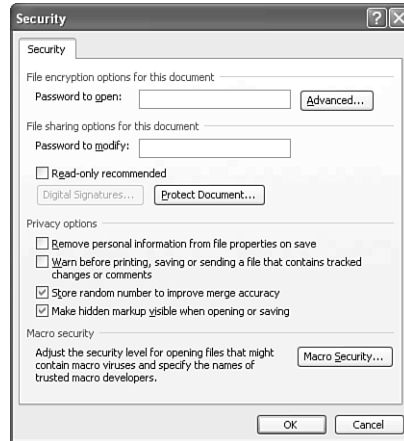

You can display the same security settings by choosing Tools, Options and clicking the Security tab. It doesn't matter which route you take to get to these settings; both methods will apply the settings to the current document only.

4. Click **OK**.

5. Retype the password in the Confirm Password dialog box, and click **OK** again to return to the Save As dialog box. If you entered passwords for both opening and modifying the document, you will see two Confirm Password dialog boxes. Enter the password for opening the file in the first dialog box and the password for modifying the file in the second.

6. Finish saving the document.

If you required a password to open the document, the next time you issue the command to open the document, the Password dialog box shown in Figure 18.14 appears.

FIGURE **18.14**

Type the password and click OK to open the document.
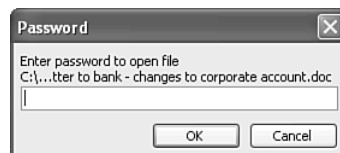
If you required a password to modify the document, you will see the dialog box shown in Figure 18.15. (If you required both types of passwords, Word will only display the dialog box for modifying the document if you entered a correct password for opening the document.)

FIGURE 18.15

Type the password and click OK to modify the document.
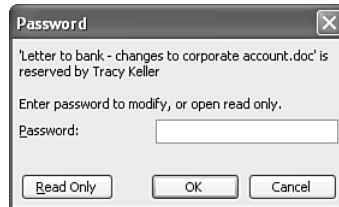
If you know the password to modify the document, you can enter it and click OK. Otherwise, you have to click the Read Only button to open the document. When you open a document as a read-only file, the label [Read-Only] appears in the title bar to remind you that if you revise the document, you will have to save the edited document under a new name.

> The Read-Only Recommended check box in the Security dialog box gives you the lightest level of protection. If you mark it, Word suggests that the user open the document as a read-only file, but doesn't require him/her to do so. If you don't need a high level of protection and just want to give a user the option of opening the document as a read-only file, use this technique.

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Saving Different Versions of a Document

If you want to keep track of multiple versions of the same document as you're working on it, you might want to store them all in one place under the same filename instead of saving them as separate documents. Word's versioning feature lets you save "snapshots" of a document at its various stages of development so that you can refer back to previous versions if need be. For each version, Word stores information about who created it, when it was created, and a brief description of it.
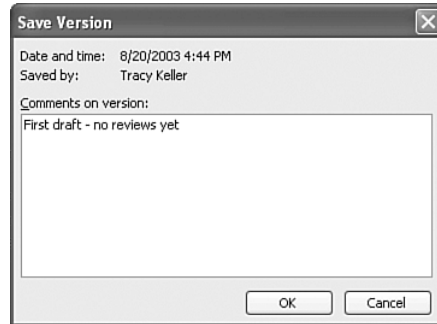
To save a version of a document, follow these steps:

1. Open the document and revise it if desired to create the version that you want to save.

2. Choose **File**, **Save As**.

3. Click the **Tools** button at the top of the Save As dialog box, and click **Save Version**.

4. In the Save Version dialog box, type a brief comment about the version that's onscreen (see Figure 18.16).

Save Version

Date and time: 8/20/2003 4:44 PM
Saved by: Tracy Keller

Comments on version:

First draft - no reviews yet

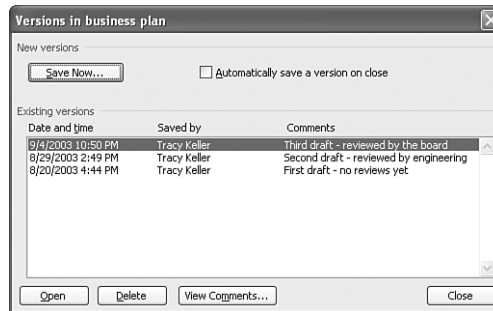   OK   Cancel

5. Click **OK**.

You can repeat these steps to continue saving "snapshots" of the document during your editing process.

When you want to open the most recent version of the document, just open it as you would open any other file. If you want to open a previous version, first open the document, and then choose File, Versions to display the Versions dialog box (see Figure 18.17). This dialog box lists any versions of the document that you have saved with the versioning feature. Select the one that you want to review, and click the Open button.

FIGURE **18.17**

Choose the version you want to open in the Versions dialog box.

Versions in business plan

New versions

Save Now...   ☐ Automatically save a version on close

Existing versions

Date and time	Saved by	Comments
9/4/2003 10:50 PM	Tracy Keller	Third draft - reviewed by the board
8/29/2003 2:49 PM	Tracy Keller	Second draft - reviewed by engineering
8/20/2003 4:44 PM	Tracy Keller	First draft - no reviews yet

Open   Delete   View Comments...   Close

Word arranges the current version in a Word window across the top half of your screen and the previous version in a separate Word window beneath it. This enables you to review both versions at the same time. If you decide to modify a previous version, you are required to save the modified version as a separate file so that the record of versions in the original file isn't altered.

Making Your Word Documents Compatible with Earlier Versions of Word

Word 2003 saves files in the same format as Word 2000, Word 2002 (XP), and Word 97, so someone who is using these older versions of Word can open your Word 2003 documents without converting them. You can also open older Word documents in Word 2003 without a conversion process. However, Word 2003 does have some features that are not supported by earlier versions of Word. If you want to create documents specifically for use in Word 97 or Word 6.0/95—perhaps most of the people in your office are still using Word 97 or Word 6.0 (95)—you can tell Word 2003 to disable all the features that Word 97 or Word 6.0/95 does not support. Follow these steps:

1. Choose **Tools**, **Options**.
2. Click the **Save** tab (see Figure 18.18).

Use the Save tab to disable features not supported by Word 97.

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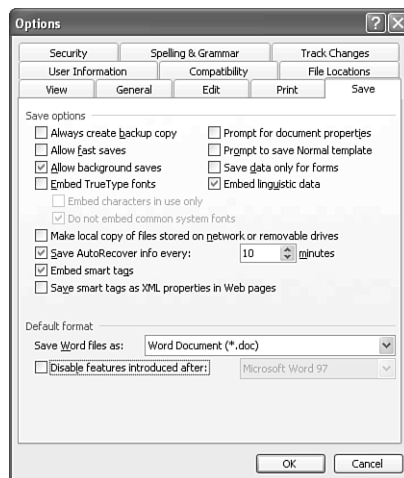
3. Mark the **Disable Features Introduced After** check box, and choose Word 97 or Word 6.0/95 in the drop-down list.
4. Click **OK**.

Word 2003 does not save files in the same format as Word 6.0 or Word 95. If you want to give a document to someone who is using one of these versions of Word, you need to save it in a format that he or she can open. To do so, choose Word 97-2003 & 6.0/95 – RTF in the Save As Type list at the bottom of the Save As dialog box. When you open a Word 6.0/95 file in Word 2003, it automatically converts it to Word 2003 format for you.

Summary

Collaborating on documents with other people has plenty of rewards, but it can be frustrating if you lose track of who made what changes when. Word's collaboration features can bring some semblance of order to an essentially messy process. Now that you know some of the key collaboration features Word has to offer, you'll be better able to decide whether and how you and your colleagues might work on Word documents as a team.

Q&A

Q I need to send a document to someone, but don't want to include any information about the name of the author, and so on. I know this information is usually available when you choose File, Properties. Is there any way to strip this out?

A Yes. When the document is open, choose Tools, Options. In the Options dialog box, click the Security tab and mark the check box labeled Remove Personal Information from File Properties on Save.

Q Several people have reviewed my document and I want to review their changes and comments one by one. Is there a way to do this?

A Yes. In the Reviewing toolbar, click the Show button, point to Reviewers, and click the name of the person whose changes and comments you want to view. When you're ready to go on to the next person, repeat these steps. You can always go back to seeing everyone's changes and comments at once by choosing Reviewers, All Reviewers in the Show menu.