



Ten Tips for Working around the Shortcomings of Word's Track Changes

Esquire Innovations, Inc., a leading provider of Microsoft Office integrated practice management software services and applications for the legal market, counts more than 550 law firm and in-house council clients utilizing its applications. Esquire Innovations has been developing, supporting, and selling document creation, formatting, re-purposing, comparing, and metadata management software applications in the legal industry since 1999. Innovative Software + Astonishing Services = Extraordinary Client Success



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Introduction

What is Track Changes?

Track Changes is an electronic text recorder, similar to traditional redlining¹. Microsoft Word uses Track Changes to track (record) the changes you or others make to a document. Then, you can then choose to accept or reject those changes.

Why Use Them?

As an example, Joel creates a document and emails it to a client, Susan, for further revisions. Susan revises the document with Track Changes on. When Susan emails the document back to Joel, he can see what changes Susan has made.

Tip 1. Identifying Whether Track Changes² Are On or Off

Let's admit it, turning Track Changes on or off is not the most intuitive feature in Microsoft Word. **Tip 1** will show you how to tell if they're on and how to toggle your Track Changes on and off.

Often it's hard to tell if Track Changes is enabled. There's no neon sign in Microsoft Word that says TRACK CHANGES IS ON. That would be nice, but it's not the case. The only reliable and quick indication is to look at Word's Status bar located at the bottom of your screen (see Figure 1).

If the TRK status button in the status bar is NOT highlighted then Track Changes is off and your changes are not being tracked (see Figure 1).

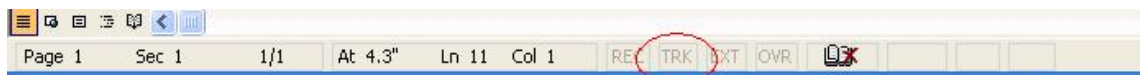


Figure 1 Word's Status bar showing Track Changes is OFF

If the TRK status button in the status bar is highlighted then Track Changes are on and your changes are being tracked (see Figure 2)

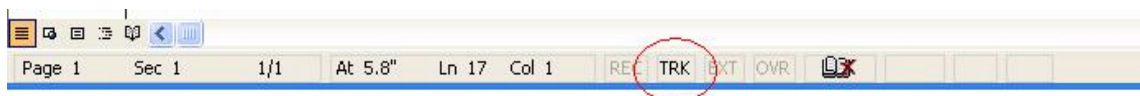


Figure 2 Word's Status bar showing Track Changes is ON.

¹ Tracked changes are similar to redlines, or redlining. Traditionally, vertical red lines were drawn in the margin to show that text has changed.

² This white paper refers to Track Changes as they relate to Microsoft Word 2003.

It's simple. All you have to do is keep an eye on Word's status bar and the TRK status button and you'll know instantly whether the Track Changes feature is On or Off.

Know how to turn them on or off – the basics.

Ok, now... how do you turn Track Changes on? The answer is: there's a long way and a short and quick way to do it. Let's just focus on the short and quick way. And of course there's a "mouse" and a "keyboard shortcut" approach to this. Choose the approach you feel most comfortable with.

Turn Track Changes On or Off using a Keyboard Shortcut

To turn Track Changes on using the keyboard shortcut, press [Ctrl]+[Shift]+E. This is a toggle. That means that pressing [Ctrl]+[Shift]+E turns it on (see Figure 2) and pressing [Ctrl]+[Shift]+E again toggles it off (see Figure 1)

Turn Track Changes On or Off using the Mouse

To turn Track Changes on using the mouse, follow these steps:

1. Point to the TRK status button on the status bar with your mouse (Figure 3).
2. Double-click the left mouse button. Like the keyboard approach this is a toggle. Double clicking again turns Track Changes OFF.



Figure 3 Turning Track Changes on/off using the mouse

Tip 2. Displaying your Track Changes the way you want

The way you want it? That's kind of a misnomer, because Microsoft Word doesn't give you a lot of track change formatting flexibility. What makes it more confusing is that you can't control how others view your track changes.

A significant shortcoming of formatting tracked changes is that it is user specific. That is, Track Changes only reflects the formatting configuration of each individual's machine. If a document is opened on another user's machine, the tracked changes are formatted according to that user's settings. Unless everyone involved in the collaboration has Track Changes formatted the same, it makes it difficult to visually distinguish the changes made by each author.

Displaying the Track Changes Dialog Box

In order to change the formatting of tracked changes, you need to use the Track Changes options dialog box (see Figure 4).

To view the Track Changes options dialog box:

1. On the main menu bar, select Tools.

2. In the Tools drop-down menu, select Options.
3. In the Options dialog box, select the Track Changes tab.

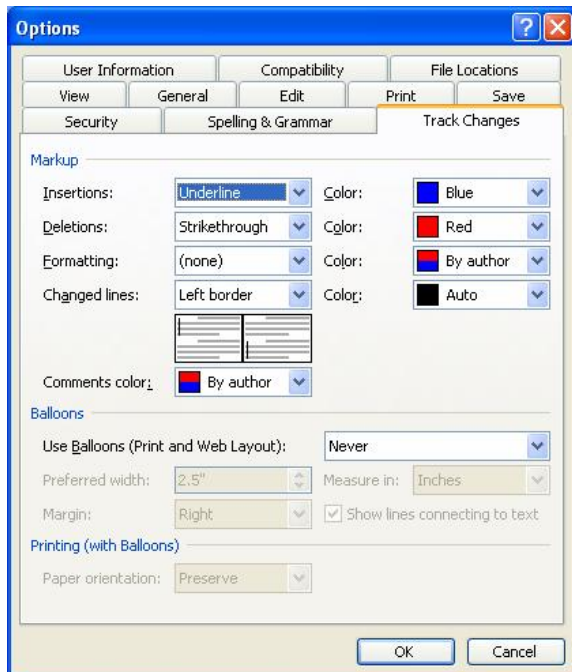


Figure 4 Tools...Options Track Changes Dialog Box

Power tip: Make Track Changes options dialog box easier to get to by creating a keyboard shortcut:

- 1 On the main menu bar, select Tools.
- 2 In the Tools drop-down menu, select Customize.
- 3 In the Customize dialog box, select the Commands tab.
- 4 Click the Keyboard button.
- 5 In the Categories list box, select All Commands.
- 6 In the Commands list box, select (scroll down) and select ToolsOptionsRevisions.
- 7 Click in the Press new shortcut key text box.
- 8 Type [Alt]+O (or any keyboard short cut you want (see Figure 5).
The "currently assigned to:" should say [unassigned]. If not then choose another keyboard shortcut combination.
- 9 Click the Assign button.
- 10 Click Close.
- 11 Click Close at the Customize dialog box.

Now when you type [Alt]+O the Track Changes options dialog box appears (see Figure 6).

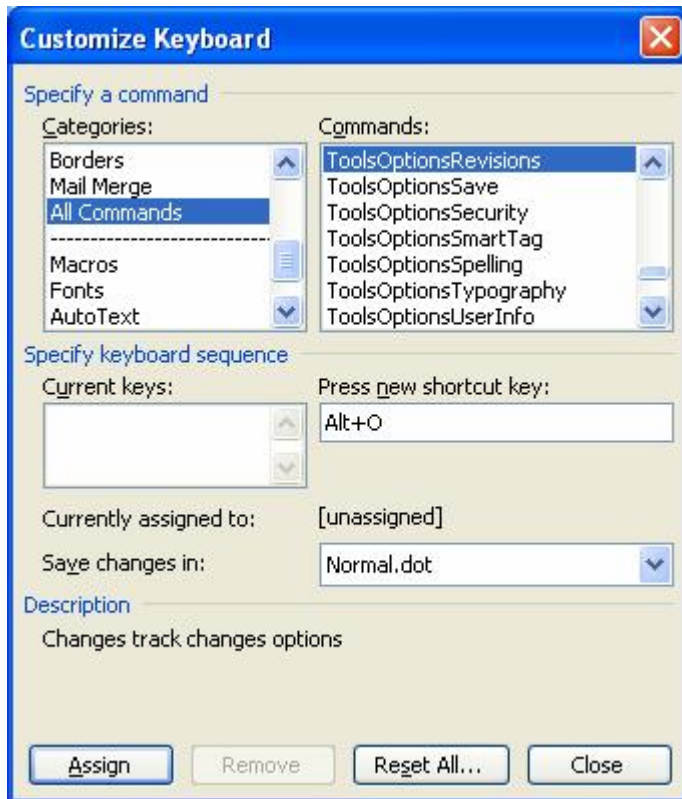


Figure 5 Customize Keyboard dialog box

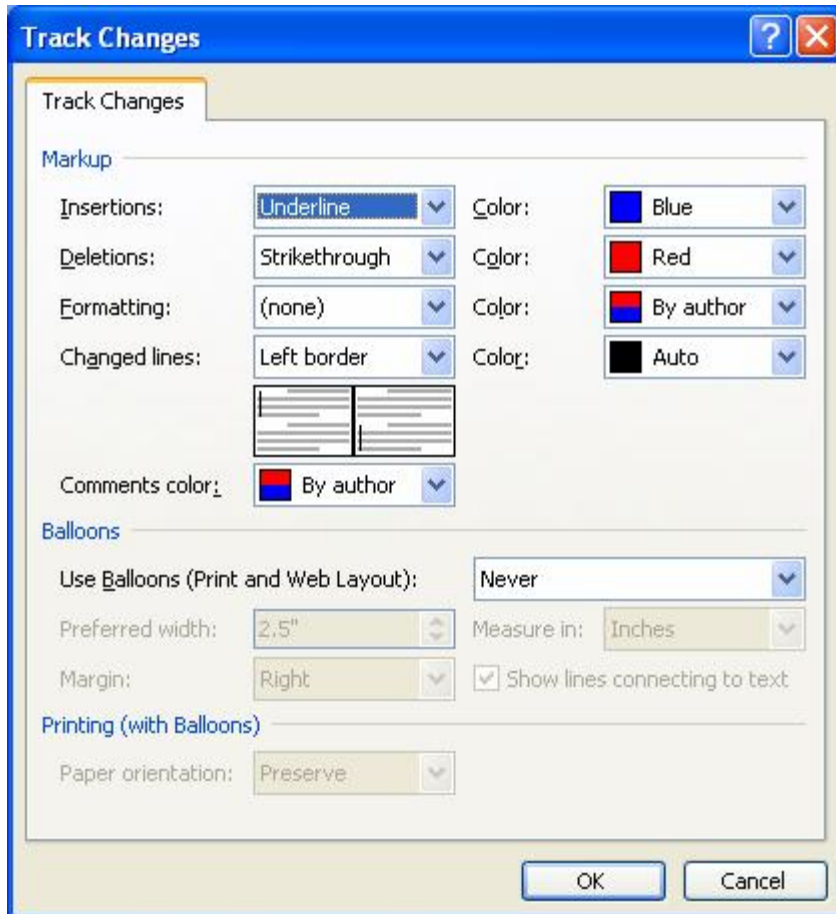


Figure 6 Track Changes Option Dialog Box

Changing the Way Tracked Changes Look

Let's cut to the chase. Instead of showing you every possible way to format track changes, let's focus on two *Best Practice* approaches. First is to show **deletions** and **insertions** as a specific format. Second is to show **deletions** and **insertions** by Author.

Showing Deletions and Insertions as a Specific Format

For reviewing purposes, the format that is easiest to read and is most familiar is Insertion markups set to **Underline** and **Blue** (see Figure 6) and Deletions set to **Strikethrough** and **Red**.

Tracking the Formatting changes, for the most part are unnecessary and should be set at **None**.

Change Lines are the real jewel of Track Changes. They can make the reviewing and collaboration process much faster by pinpointing the exact place in the document tracked changes are made. It is best to set them at **Left border** and color set to **Auto**.

Balloons can be confusing, compress the printed document, and are a little irritating, so it is recommended that you turn them off by selecting **Never**.

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Figure 7 Example of Insertions and Deletions using the formatting described above

Showing Deletions and Insertions by Author

Distinguishing deletions and insertions by author is a great way to collaborate on a document because the tracked changes are shown in a different color for each author (see Figure 9). In the example below, insertion markups are set as **Underline** and the color is set to show by **Author** (see Figure 8). Deletions are set as **Strikethrough** and **Author**.

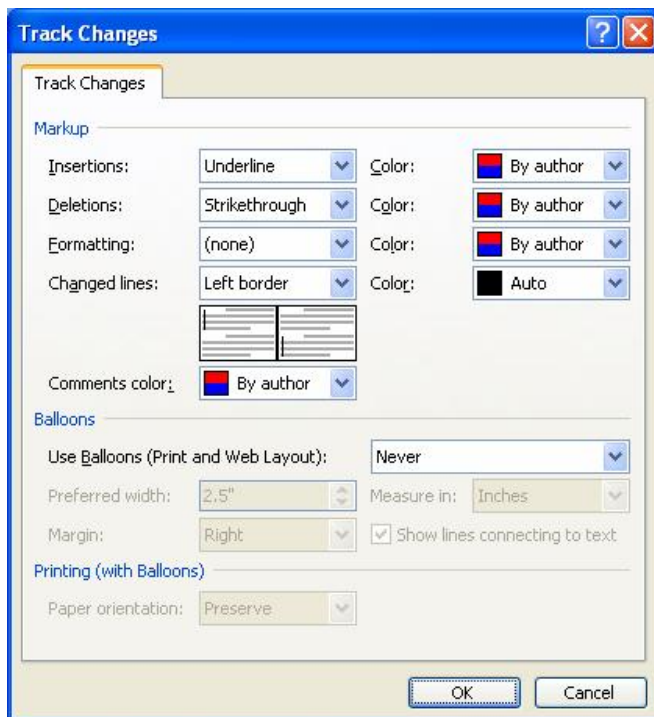


Figure 8 Track Changes Option Dialog Box by Author

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Figure 9 Track Changes formatted by Author as described above

Tip 3. Get Rid Of Those Bubbles!

We often get calls from clients who associate iRedline (our comparison and redlining tool for Word and Excel) with placing balloons in the result document (see Figure 10).

This is actually a **feature** of Microsoft Word and is set ON by default. Personally, I find them obtrusive and always turn them off on my machine.

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Figure 10 Track Changes showing bubbles

To turn track change bubbles off, follow these steps:

1. On the main menu bar, select Tools.
2. In the Tools drop-down menu, select Options.
3. In the Options dialog box, select the Track Changes tab.
4. In the Use Balloons list box, select Never (see Figure 11).
5. Click OK.

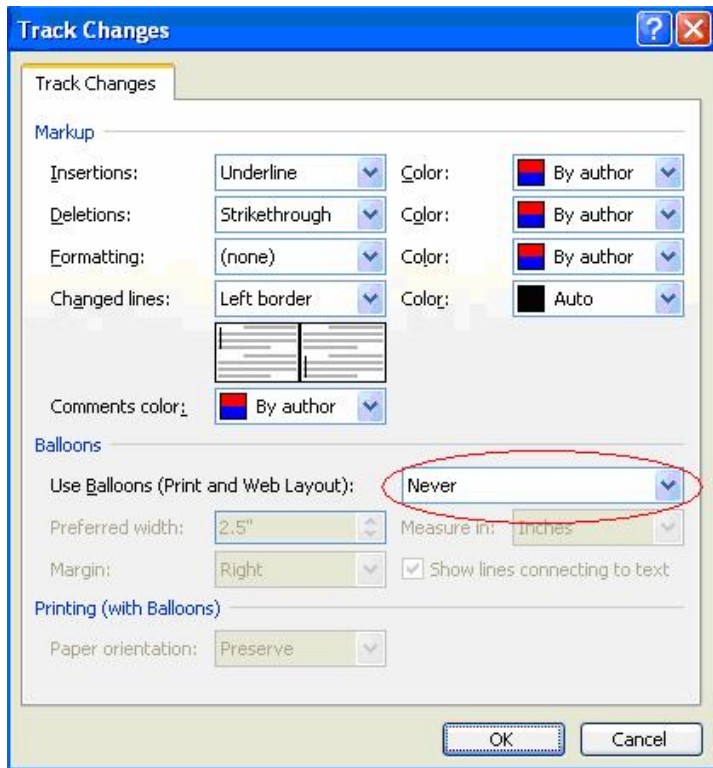


Figure 11 Track Changes Option Dialog Box - turning off Balloons

Tip 4. Make Sure You're Viewing All of Your Track Changes

Did you know you could be working on a document and adding tracked changes and not be aware of it at all? That's right; Microsoft has made Word's Track Changes so versatile that one can very easily (if not aware) be working on a document and not see the tracked changes.

The Reviewing Toolbar

The Reviewing Toolbar is your Track Changes command center (see Figure 12). The only shortcomings are that it is complicated and always visible. Most people close it out of frustration. I do.



Figure 12 Reviewing Toolbar

The Reviewing Toolbar is Your Friend

Unless you're working with a more advanced redlining tool for Word, it's a good idea to show the Reviewing Toolbar whenever you are working on a document containing tracked changes.

To show the Reviewing Toolbar, follow these steps:

6. On the main menu bar, select View.
7. In the drop-down menu, select Toolbars.
8. In the next drop-down menu, select Reviewing

Show What?

Once the Reviewing Toolbar is displayed, you can tell Word which changes you want to view, using the Reviewing Toolbar's Display for Review list box (see Figure 13).

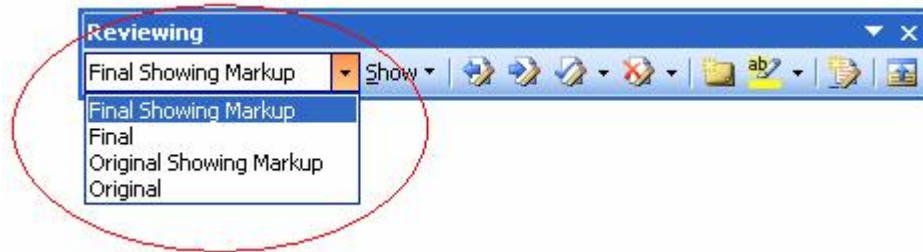


Figure 13 Reviewing toolbar - and the Display for Review list box

Most of the time you want to see the document as close to the final version as possible. The **Final Showing Markup** mode does this by showing the final text with all the track changes displayed.

Don't Get Confused with the Display for Review List Box

Understanding each of these displays will help you in deciding which ones to use.

Here's a list of the other three views and a description of each:

View	Description
Final	This is the final version with the tracked changes accepted. Beware - this view hides the tracked changes but they are still contained in the document.
Original Showing Markup	<i>This view requires Balloons turned on.</i> As an author, you're curious about the changes made by someone else, but you'd like to see the text as you wrote it. This view shows ALL the suggested insertions in balloons and suggested deletions within the text.
Original	This is the original version without the tracked changes displayed. This view is the same as rejecting the tracked changes. Beware - this view hides the tracked changes but they are still contained in the document.

Tip 5. Merging, Comparing, Blacklining, and Redlining – What?

Track Changes are great for tracking the changes in an active document being reviewed and edited by multiple authors or reviewers. What do you do if you have two

separate documents with changes and you want to compare or merge those changes to create a "result" document? That's when you use Word's compare and merge features.

Let's first look at some terms to make things clearer:

Note: *The result of all merges and comparisons are Track Changes.*

Feature	Description
Merge	This merges the open document into the document selected in the Compare and Merge Documents dialog box (see Figure 14) and tracks the differences between the two.
Merge into current document	This merges the changes from the document selected in the Compare and Merge Documents dialog box into the open document and tracks the differences between the two.
Merge into new document	This displays the merged results into a new document.
Legal blackline	The Legal blackline option displays a new document with tracked changes showing the insertions and deletions. If there were any tracked changes in the baseline documents, they are accepted before the comparison (see Figure 15). The typical legal blackline would be initiated from the revised document.
Redlining	Tracked changes are similar to redlines, or redlining. Traditionally, vertical red lines were drawn in the margin to show that text had changed. Also, redlining is a term used for advanced third party comparison tools, such as Esquire Innovations iRedline that leverages Word's Track Changes and provides redlining tools to convert tracked changes into static insertions and deletions and back into track changes.
Revised document	This is the changed document. The compare process is initiated with this document open.
Original document	When comparing, this is the baseline document the revisions are compared against.

Table 1 Merge and Comparison Terms

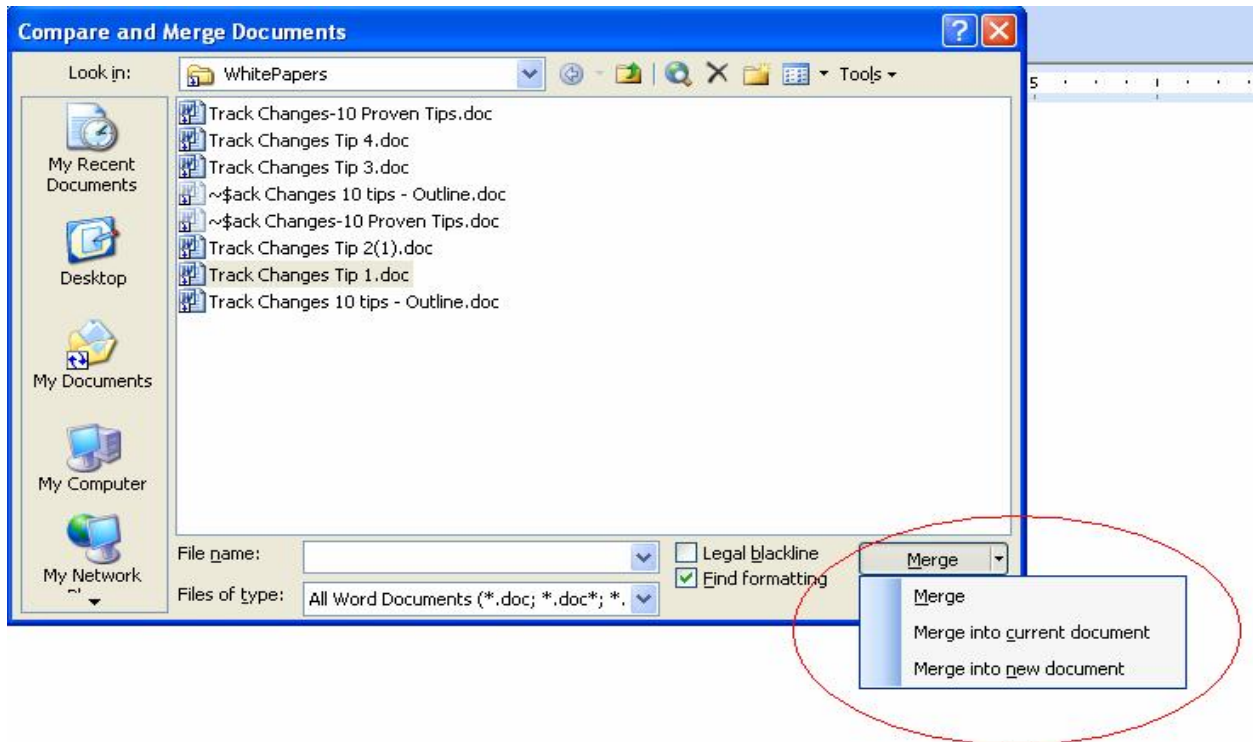


Figure 14 Compare and Merge Dialog Box

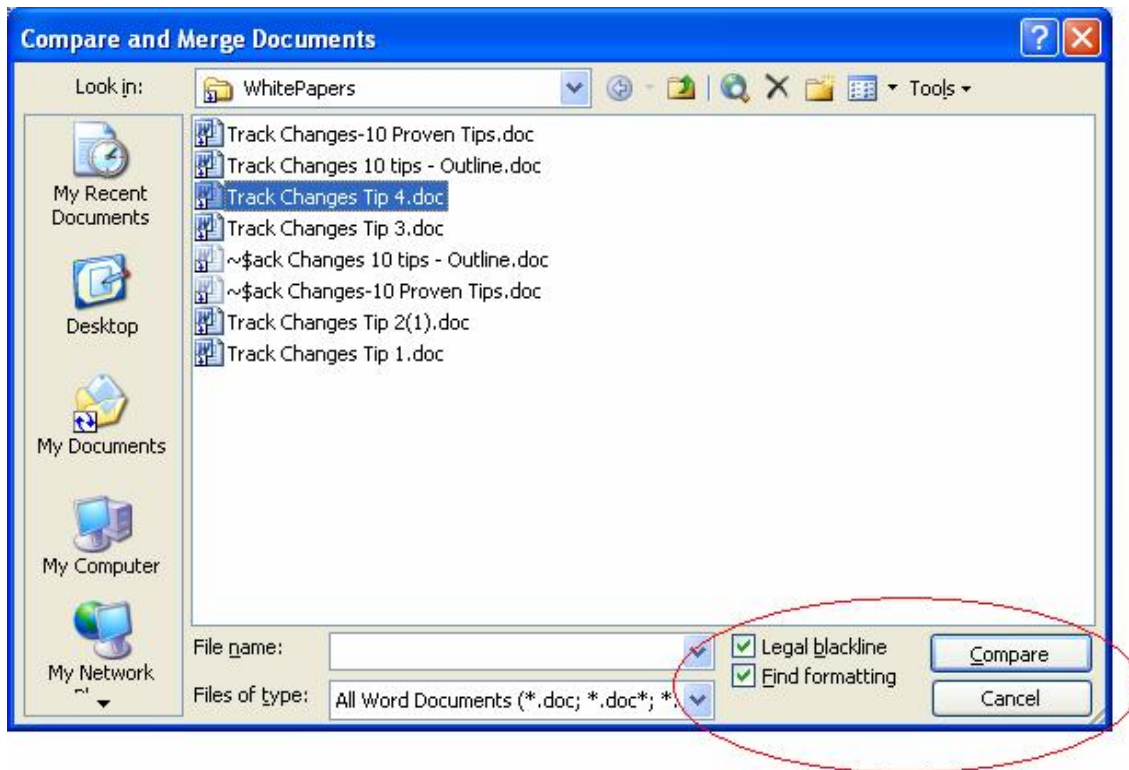


Figure 15 Compare and Merge Dialog Box - Legal blackline

To compare or merge two documents, follow these steps:

1. Open a document.
2. On the Tools menu, click Compare and Merge Documents.

Tip 6. Select the document that you want to compare to the copy that is currently open.

3. a) Click the arrow next to Merge to select what type of merge you perform (see Table 1).

OR

- b) If you want to compare the selected document to the open document check Legal blackline (see Figure 15) and click Compare.

Tip 7. Are Tracked Changes still there?

As mentioned in Tip 4, you may not be aware that changes are tracked in your document. To be certain they are not, I recommend a two-pronged approach – **Accept All Changes** and use **Word's Warning System**.

Track Changes Safe Guard Rules

❖ **Accept All Changes**

If you want to make sure there are no tracked changes in your document, Accept All Changes just in case. This will give you peace of mind

- From the Reviewing toolbar, you can select Accept All Changes in Document (see Figure 16). Whether you see the tracked changes or not, this will accept any stragglers.



Figure 16 Reviewing Toolbar - Accept All Changes in Document

❖ **Turn on Word's Track Changes Warning System**

A nice security aspect, but a little "in your face", is Word's feature that warns you when you have tracked changes in your document whenever you print, save or send a document (see Figure 17).

To turn Word's Track Changes warning system on, follow these steps:

1. On the main menu bar, select Tools.
2. In the Tools drop-down menu, select Options.
3. In the Options dialog box, select the Security tab.

4. Click the check box *Warn before printing, saving or sending a file that contains tracked changes or comments* (see Figure 17).

For added security, click the check box *Make hidden markup visible when opening or saving*. This will ensure that tracked changes are always visible.

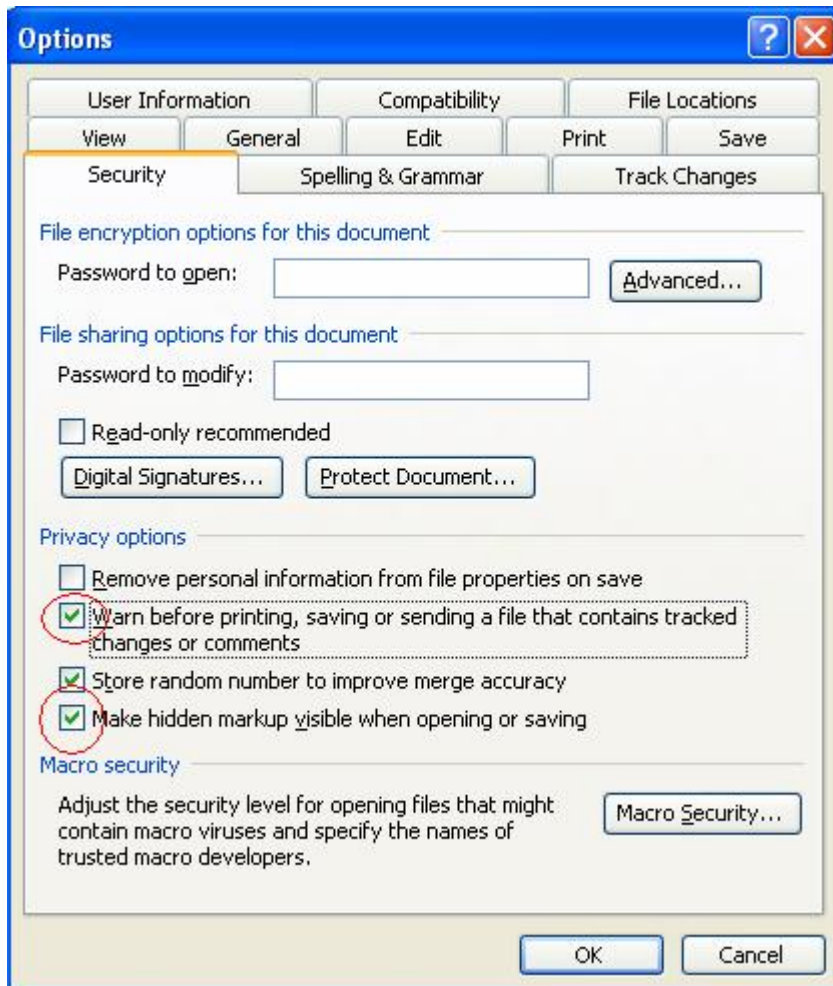


Figure 17 Tools Options Security Tab

Tip 8. Print Your Track Changes

Unfortunately a major shortcoming with Word's Track Changes is the ability to print "just" the pages that have tracked changes. With that said, not all is lost, because you still have a couple of print options for Track Changes.

If you want to print the document and also print track changes, select *Document showing markup* in the Print what list box (see Figure 18).

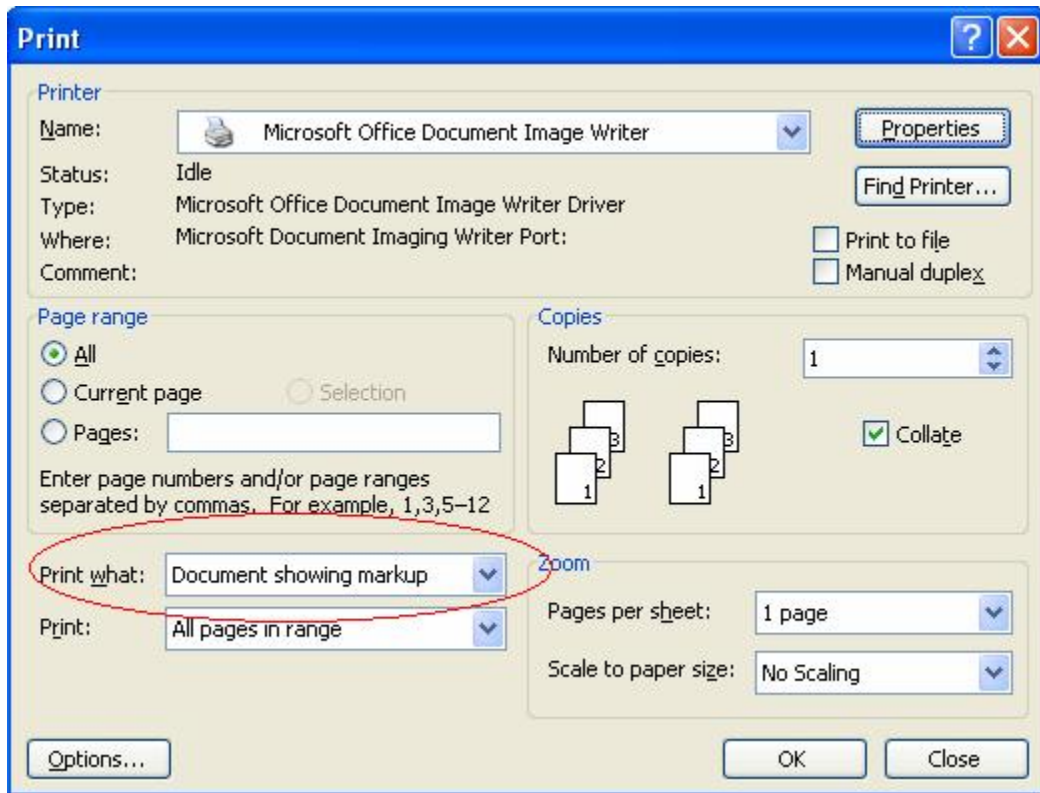


Figure 18 Print Dialog Box

Print a List of Your Track Changes

A scarcely used feature is the *list of markup* print options (see Figure 19). This prints a simple list of the changes, author and time of change (see Figure 20).

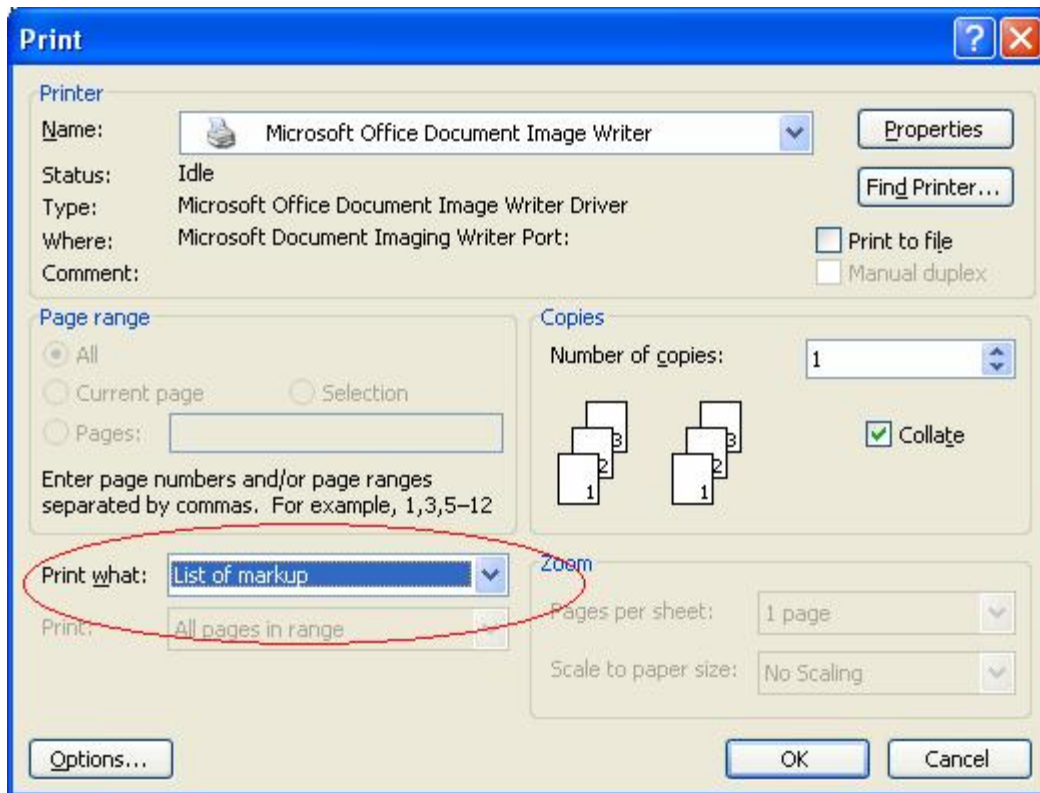


Figure 19 Print Dialog Box - List of markup

Main document changes and comments		
Page 1: Inserted Tuesday, May 15, 2007	Craig Keller	5/17/2001 10:38:00 AM
Page 1: Deleted THIS ____ DAY OF MARCH 2000	Craig Keller	5/17/2001 10:38:00 AM
Page 1: Deleted TechLaw	Randall Farrar	7/31/2006 6:42:00 AM
Page 1: Inserted ABC Corp	Randall Farrar	7/31/2006 6:42:00 AM
Page 1: Deleted TechLaw	Randall Farrar	7/31/2006 6:42:00 AM
Page 1: Inserted ABC Corp	Randall Farrar	7/31/2006 6:42:00 AM
Page 1: Inserted	Craig Keller	5/17/2001 10:39:00 AM
1. SCOPE OF WORK 1 2. ACCEPTANCE TESTING AND ACCEPTANCE 1 3. TERM 5 4. CONSIDERATION AND PAYMENT 5		
Page 1: Deleted	Randall Farrar	7/31/2006 6:42:00 AM

Figure 20 List of markups

Tip 9. Know What Others Are Doing To Your Documents

There may be times when you don't want other reviewers to change your document, and if they make any changes, you want to be able to see what they've added or deleted. In other words, you want to "track" their changes. You can do this by *locking a document for Track Changes only* which forces the Track Change mode On

When you lock a document for Track Changes only, all new text is marked as an insertion and erased text is marked as a deletion.

Lock Your Document for Track Changes Only

To lock your document for track changes, follow these steps:

1. On the main menu bar, select Tools.
2. In the drop-down menu, select Protect Document.
3. In the Protect Document Task Pane (see Figure 21), click the *Allow only this type of editing in the document* check box.
4. In the *Editing restriction* drop down list box, select Tracked changes.
5. Click the *Yes, Start Enforcing Protection* button



Figure 21 Protect Document Task Pane

6. At the Start Enforcing Protection dialog box, enter a password (see Figure 22).

Note: You will need to remember the password later to unprotect the document to accept or reject the tracked changes.

7. Click OK.



Figure 22 Start Enforcing Protection dialog box

Tip 10. Control your Metadata!

What is metadata? What does it have to do with Track Changes?

Metadata Defined

Microsoft Word documents contain hidden data and information peripheral to the content, such as deleted text, revision authors, and file system information. When these files are shared outside of the firm, there is a high risk of unintentional disclosure of private information (metadata risk).

Word's Track Changes contain three areas of metadata, and if not managed properly, these can pose a risk for firms.

Track Changes Metadata

- ❖ Tracked change text
- ❖ Author names
- ❖ Date and Time change was made

Tracked Change Text

It's important that you are aware of tracked changes in your document, that they are a part of the revision and collaboration process, and not unintentional. It's when tracked changes are unintentionally left in the document that they become a metadata risk.

Author Names

Word keeps a record of all authors who have revised a document's content or have added comments. In Figure 23, there are 13 authors who have revised this document or have added comments.

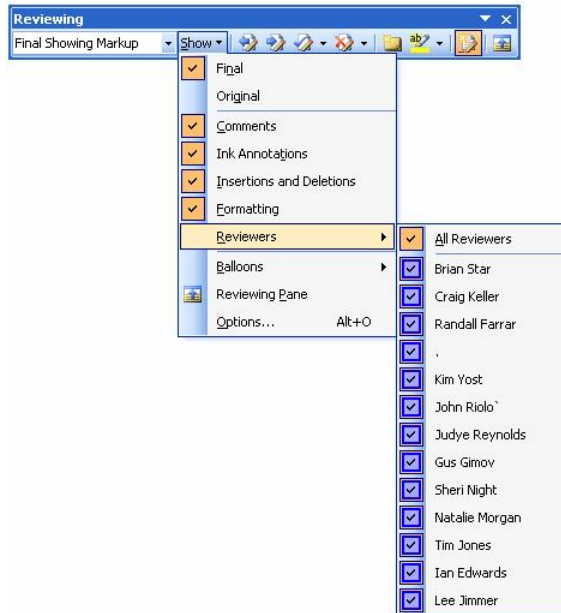


Figure 23 Reviewing Toolbar showing all Reviewers

Preventing Author Names

To prevent author names from being recorded, select *Remove Personal Information* under the Security tab (see Figure 24). When selected, all author names are changed to a single name, **Author**.

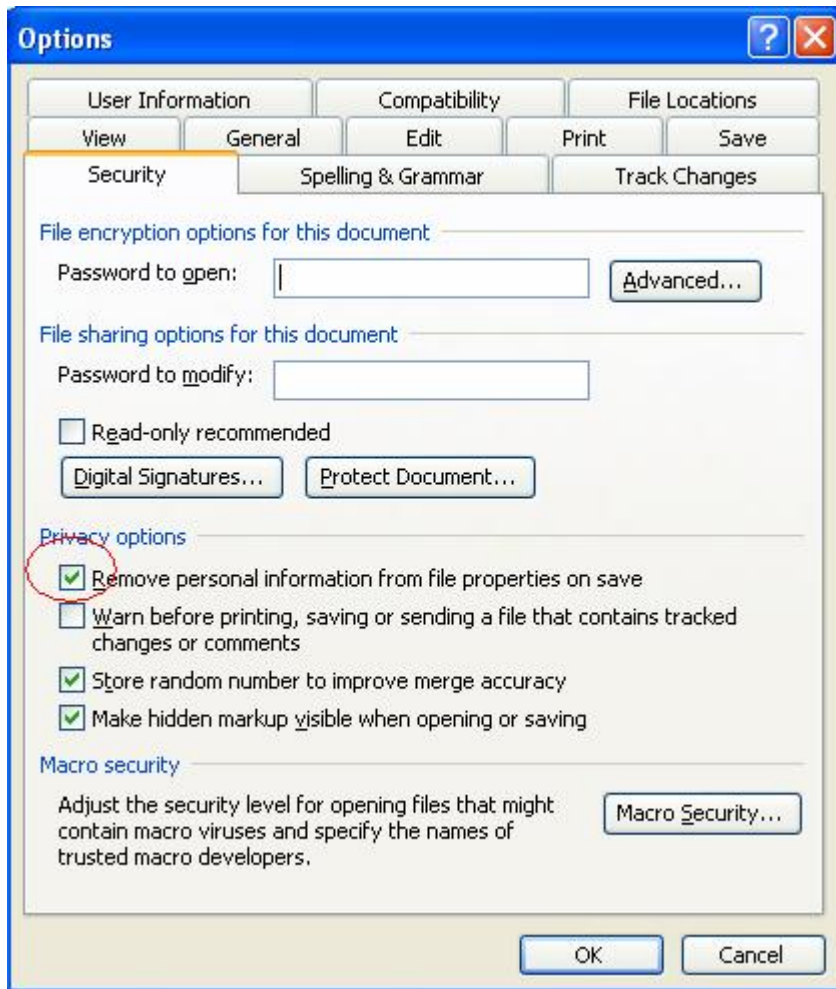


Figure 24 Tools Options Security Tab

Date and Time Change Was Made

As Word tracks changes made to the document, the date and time are tracked as well (see Figure 25). To prevent date and time from being recorded with your tracked changes, select *Remove Personal Information* in the Security tab (see Figure 24). This setting will also remove author names.



Figure 25 Track Change showing the date and time

Microsoft Word tracks paragraphs and formats with a unique identifying number called the Random Number. The random number is needed for more accurate merging and comparison between documents.

To ensure the best possible merge and comparison results, make sure that the *Store random number to improve merge accuracy* check box is selected on the Security tab of the Options dialog box (see Figure 26).

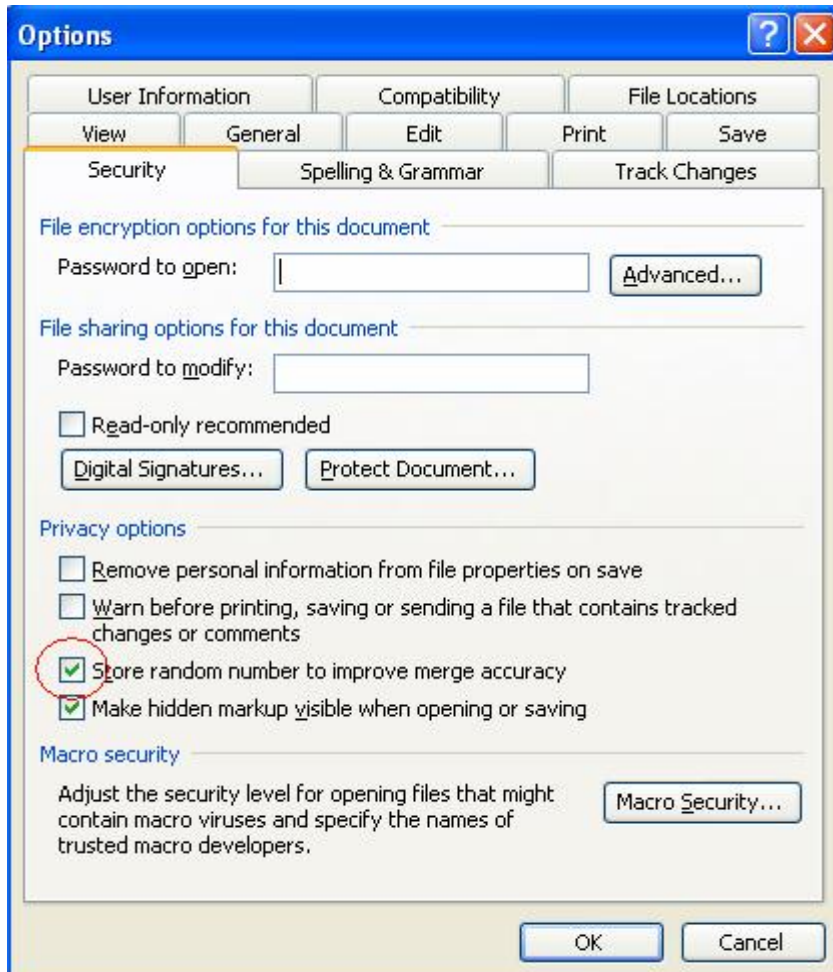


Figure 26 Options Security Tab - Store random number

Summary

To facilitate online review and collaboration, Microsoft Word allows you to easily make and view tracked changes. Track Changes are powerful yet many of the shortcomings hinder the total usefulness of the review and collaboration.

Track Changes Shortcomings

- ❖ The lack of flexibility to format Track Changes and retain that format from machine to machine makes it hard for reviewers to collaborate in a productive, cohesive manner.
- ❖ The extra effort and knowledge to display Track Changes the way you want – Balloons, Final, Original, etc.
- ❖ The complexity of knowing when to compare or merge.
- ❖ Inability to Print only those pages with track changes.
- ❖ Inability to convert tracked changes into static redline text that cannot be accepted or rejected, and vice versa.

iRedline – Track Changes on Steroids

These shortcomings can easily be overcome with Esquire Innovations' iRedline. iRedline can:

- ❖ Navigate, accept or reject changes from iRedline, Track Change and DeltaView documents.
- ❖ Toggle Insertion/Deletion Views
- ❖ Convert Redline and DeltaView changes to Track Changes and Track Changes back to static iRedline changes
- ❖ Create Change Reports
- ❖ Print Only Redlined Pages
- ❖ Create a Separate Change List