

CHAPTER 13

TRACKING CHANGES**InFocus**

If you are working on a document that needs to be edited and reviewed by others, then Word's **Tracking** feature may prove indispensable. When this feature is turned on, Word will record and highlight any and all editing changes made to the document. Word will display the original text as well as the edited text in the document. The editor or reviewer can then work through the document by accepting or rejecting these changes.

In this session you will:

- ✓ gain an understanding of tracking changes
- ✓ learn how to enable and disable tracked changes
- ✓ learn how to change options for tracking changes
- ✓ learn how to show revisions in balloons
- ✓ learn how to show revisions inline
- ✓ learn how to hide and show revisions
- ✓ learn how to show specific types of revisions
- ✓ learn how to display the reviewing pane
- ✓ learn how to accept and reject changes.

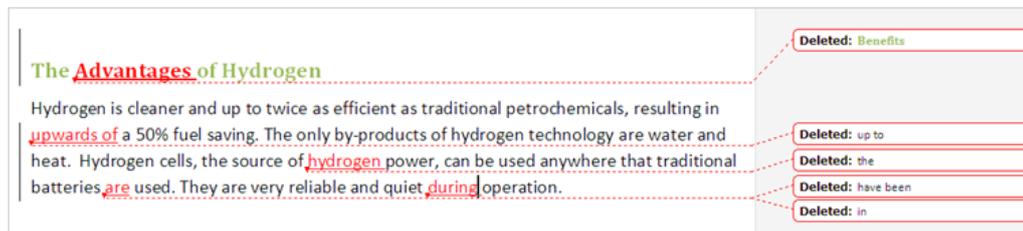
UNDERSTANDING TRACKING CHANGES

When you are collaborating on a document, it is easy to forget who did what and when. That's where the **Track Changes** tool comes in! Track Changes enables all edits and revisions to be

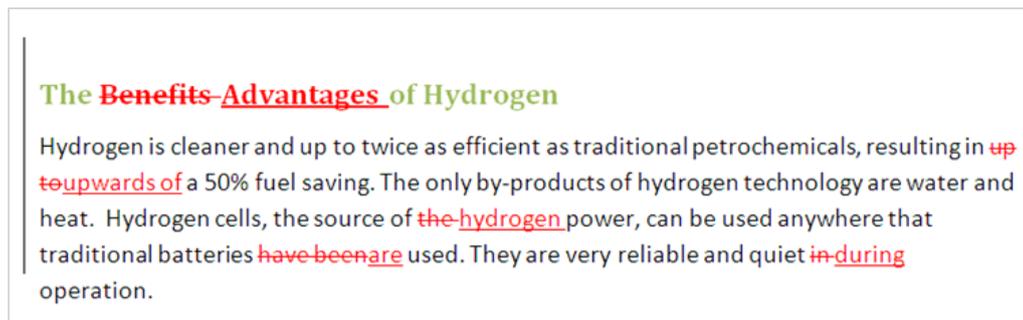
tracked and displayed in the document without losing track of the original text. Then all revisions can be either accepted or rejected by the author as required.

What is Track Changes?

Track Changes enables you to edit a document electronically (on-screen) and then review those changes, by either accepting or rejecting them. As the name suggests, **tracking** does not remove the original text from the document; it simply marks it and leaves it in place. In this way, you are able to clearly see where the changes have been made and what those changes are.



*In this example the editor has deleted "Benefits" and replaced it with "Advantages". The original text appears in a balloon to the right of the change. This style of tracking is called **Balloons**.*



*In this example, the same change is displayed in the **Inline** tracking style, where the original text appears crossed-out beside the revised text (which appears underlined). This tracking style is useful for minor edits.*

Why Use Track Changes?

Track Changes is particularly useful where you are working on a document with others who provide input, feedback and the like. A document can be written by one individual and then sent to another to edit. The editor's changes are recorded alongside the original text, and the author can then consider each change and either accept or reject that change.

If you accept a change, Word will remove the original text and replace it with the revised text. If you reject a revision, Word will remove the revision and reinstate the original text.

Track Changes also enables more than one person to edit a document, and each person's revisions can be distinguished from another's. You are able to display all reviewers' marks simultaneously, or select an individual reviewer's marks to be displayed at any one time.

ENABLING AND DISABLING TRACKED CHANGES

To track changes in your document, you first need to turn the **Track Changes** feature on (sounds reasonable, don't you think?). Tracking is controlled by a tool which is **toggle**d on and

off. Once the option is activated, you will see the revisions appear on-screen as you edit. Note that when you turn **Track Changes** on, the feature will remain activated until you turn it off.

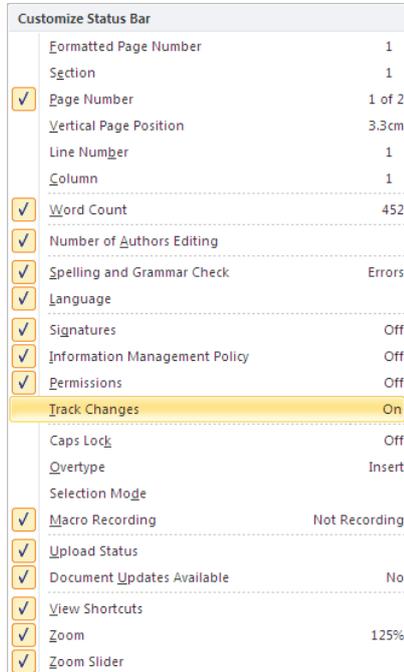
Try This Yourself:

Open
File

Before starting this exercise you **MUST** open the file W876 Tracking_1.docx...

- 1 Click on the **Review** tab, then click on the top half of **Track Changes**  in the **Tracking** group
The button stays highlighted, which means that Track Changes is turned on. You can also toggle Track Changes via the Status bar, but first you will need to add the Track Changes button to the Status bar...
- 2 Right-click on the status bar to display the shortcut menu
Track Changes is turned On...
- 3 Select **Track Changes** then press **Esc** to hide the menu
An additional button now appears in the Status bar...
- 4 Click on **Track Changes** in the **Status** bar
The status will change to Off...
- 5 Click on **Track Changes** in the **Status** bar to switch it **On** again
- 6 Repeat steps 2 and 3 to hide the **Track Changes** button in the **Status** bar
- 7 Save the document

2



3



4



For Your Reference...

To **enable** and **disable track changes**:

1. Click on the **Review** tab
2. Click on the top half of **Track Changes**  in the **Tracking** group

Handy to Know...

- If you turn **Track Changes** on, make changes to the document and then turn **Track Changes** off, your changes will not be lost. They must be **accepted** or **rejected** before they are removed. They will just be hidden until you turn **Track Changes** on again.

CHANGING TRACKING OPTIONS

Word provides a range of options that you can apply to customise the way you work when tracking changes. For example, you might prefer that both inserted and deleted text appears

underlined. Or, you might be required to use pink instead of red to highlight changes. You can even specify the size of balloon-style revisions. Here you will customise options for tracking changes.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W876 Tracking_1.docx...*

- 1 Click on the **Review** tab, then click on the bottom half of **Track Changes**  in the **Tracking** group and select **Change Tracking Options** to open the **Track Changes Options** dialog box

By default, "Insertions" and "Deletions" are tracked by author; however you will track changes by colour instead...

- 2 Click on the drop arrow  for **Colour** in **Insertions** and select **Red**, then click on the drop arrow  for **Colour** in **Deletions** and select **Blue**

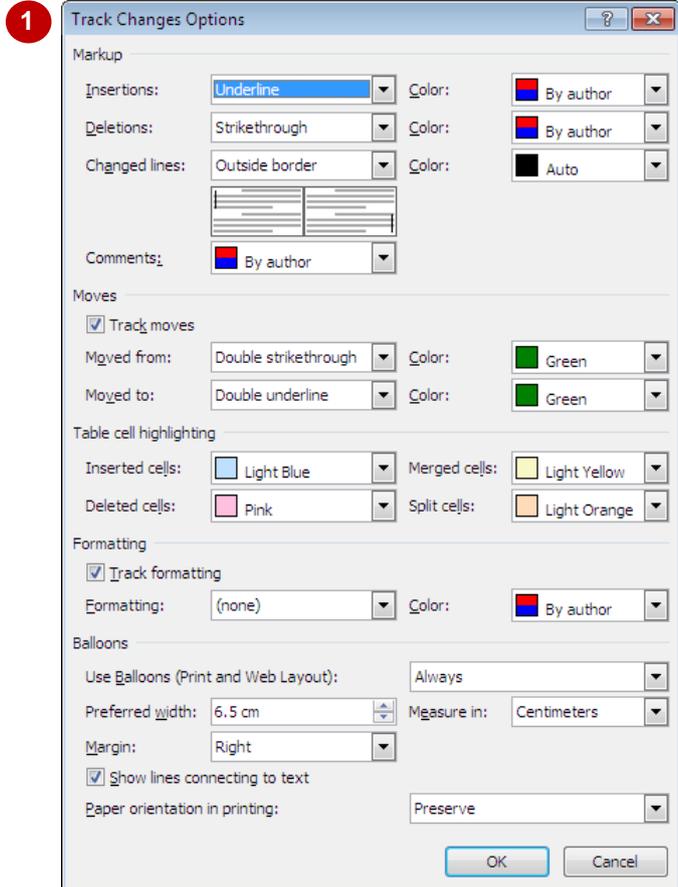
You will now apply a different colour for "Changed lines". This option enables you to scan the margins and quickly locate edits...

- 3 Click on the drop arrow  for **Colour** in **Changed lines** and select **Pink**

- 4 Click on **[OK]** to accept the changes

The changes will not be obvious until you start marking up the document...

- 5 Save the document



For Your Reference...

To **set tracking options**:

1. Click on the **Review** tab, then click on the bottom half of **Track Changes**  in the **Tracking** group
2. Select **Change Tracking Options**
3. Set the options as required then click on **[OK]**

Handy to Know...

- The **Track Changes Options** dialog box includes options for tracking **Moves**, that is, how moved text is tracked; **Formatting**, or whether you want formatting to be tracked; as well as **Table Cell Highlighting**, or how changes to tables will be tracked. You can also set the layout of **balloons**.

SHOWING REVISIONS IN BALLOONS

There are two ways that you can **display revisions**: you can display them **inline** or **in balloons**. A balloon is a small box that is displayed in an area beside the right margin, with

a line connecting it to the revised text. **Balloons** is the default revision style. In this exercise you will ensure that this default setting is applied and then make changes to the text.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *W876 Tracking_2.docx...*

- 1 Click on the **Review** tab, then click on the drop arrow  for **Show Markup** in the **Tracking** group, select **Balloons** and then select **Show Revisions in Balloons**

The option was already selected, but now we can be sure it's active. Now to turn Track Changes on...

- 2 Click on **Track Changes**  in the **Tracking** group to activate this feature

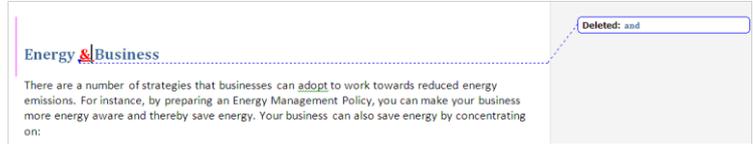
- 3 Double-click on the word **and** in the heading to select it, then type **&**

The text will be replaced and a balloon in the margin shows the changes made to the original text...

- 4 Click at the end of the first paragraph to position the insertion point, press  then type **the following**

As the inserted text is not replacing or amending the original text, it is simply underlined and no balloon inserted...

- 5 Save the document



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For Your Reference...

To **show revisions** in **balloons**:

1. Click on the **Review** tab, then click on the drop arrow  for **Show Markup** in the **Tracking** group
2. Select **Balloons**, then select **Show Revisions in Balloons**

Handy to Know...

- When you select to use balloons for tracking revisions, not all revisions will appear in balloons, but only where the *original text* has been revised. This enables you to compare the changes made between the inserted and original text.

SHOWING REVISIONS INLINE

Instead of displaying revisions in **balloons**, you can also display revisions **inline**. In this case, the revisions will appear within the document text (in-text) beside the original text. This is an

alternative way to view revisions, and ultimately you will use the revision style that best suits your needs.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W876 Tracking_3.docx...*

1

Ensure that **Track Changes**  is active in the **Tracking** group on the **Review** tab

2

Click on the drop arrow  for **Show Markup** in the **Tracking** group, select **Balloons**, then select **Show All Revisions Inline**

You will now see that the balloon disappears and the revised text now appears with a red underline beside the original text. Let's make some more changes...

3

Click immediately after the word **enters** in the third paragraph to position the cursor

This should read 'entering'...

4

Press  to delete the letter **s** then type **ing**

The revisions will be marked in line with the original text...

5

Select the bullet point **Shading**, then press  to delete the bullet point

6

Save the document

Energy ~~and~~ Business

There are a number of strategies that businesses can ~~adopt~~ to work towards reduced energy emissions. For instance, by preparing an Energy Management Policy, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on the following:

2

The design of the building is of major concern with respect to the amount of external heat entering the building and therefore how hard the air conditioner will need to work to maintain the set temperature. In poorly designed buildings, some simple ways of reducing this effect include:

4

- double glazing
- ~~shading~~
- window tinting or reflective coating

5

For Your Reference...

To **show revisions inline**:

1. Click on the **Review** tab
2. Click on the drop arrow  for **Show Markup** and select **Balloons**
3. Select **Show All Revisions Inline**

Handy to Know...

- When you apply the **Inline** revision style for tracking changes and you want to insert a comment, the **Reviewing** pane will be displayed and you will type the comment in the **Reviewing** pane (instead of a balloon).

SHOWING AND HIDING REVISIONS

When viewing a document that contains revision marks, it can become quite cluttered and difficult to see the document text. Word overcomes this by enabling you to **switch the revision marks**

on and off. This is also useful when you are not the first person to review the document and do not want your own ideas to be compromised by what other reviewers have marked up.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W876 Tracking_4.docx...*

1

Ensure that **Track Changes**  is active in the **Tracking** group on the **Review** tab

2

Click on the drop arrow  for **Display for Review** in the **Tracking** group and select **Final**

The revision marks are hidden from view, but any further revisions will still be marked up...

3

Click at the end of the heading **High Efficiency Motors** to position the insertion point

4

Press then type **(HEM)**

5

Select the text **High efficiency motors** in the next line and type **HEMs**

Let's turn revision marks back on...

6

Click on the drop arrow  for **Display for Review** in the **Tracking** group and click on **Final Showing Markup** to show the revisions

7

Save the document

Energy & Business

There are a number of strategies that businesses can adopt to work towards reduced energy emissions. For instance, by preparing an Energy Management Policy, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on the following:

Air Conditioning

There are two main types of air conditioning systems: evaporative and refrigerative. By improving the efficiency of an air conditioner, you will need less energy to generate the same amount of cooling. That is, the compressor won't need as much energy to cool the space.

The design of the building is of major concern with respect to the amount of external heat entering the building and therefore how hard the air conditioner will need to work to maintain the set temperature. In poorly designed buildings, some simple ways of reducing this effect include:

- insulation
- double glazing
- window tinting or reflective coating
- window coverings (e.g. blinds, shutters *etc*)

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High Efficiency Motors (HEM)

HEMs are those that are efficient energy savers. motors, substantial savings can be made. The ot

6

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For Your Reference...

To **show** and **hide revisions**:

1. Click on the **Review** tab
2. Click on the drop arrow  for **Display for Review** in the **Tracking** group
3. Click on **Final** to hide revisions, or click on **Final Showing Markup** to show revisions

Handy to Know...

- The **Display for Review** tool also provides an option to display **Original: Show Markup**. If you apply this option, you will be able to edit a document that has already been marked-up by others, but you will only see the original text and your own mark ups.

SHOWING SPECIFIC TYPES OF REVISIONS

There are several **types** of revision marks that you can apply to a document. These marks indicate insertions, deletions and formatting changes, and it is also possible for a document to

have multiple reviewers; each identified by their initials. Word enables you to **specify what revisions you want to show**, thereby customising the level of detail on the screen.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W876 Tracking_5.docx...*

- 1 Ensure that **Track Changes**  is active in the **Tracking** group on the **Review** tab
You will first insert a comment...
- 2 Select the text **air conditioning** in the second paragraph
- 3 Click on **New Comment**  in the **Comments** group and type **air-conditioning?**
The Reviewing pane is displayed and you will need to type the comment here as the Inline revision style is selected...
- 4 Click on **Show Markup**  in the **Tracking** group to display the list of revision types and select **Comments**
This option is now toggled off and the comment is hidden from view...
- 5 Click on **Show Markup**  in the **Tracking** group and select **Comments** to show again, then click on **Close**  to close the **Reviewing** pane
Let's hide the insertions and deletions...
- 6 Click on **Show Markup**  in the **Tracking** group and select **Insertions and Deletions**
- 7 Repeat step 6 to display insertions and deletions and then save the document

Air Conditioning

There are two main types of **air conditioning** systems: evaporative and **refrigerative**. By **improving** the efficiency of an air conditioner, you will need less energy to generate the same amount of cooling. That is, the compressor won't need as much energy to cool the space.

2

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For Your Reference...

To **specify what to show**:

1. Click on the **Review** tab
2. Click on **Show Markup**  in the **Tracking** group and select an option from the list
3. Repeat the above steps to display the option again

Handy to Know...

- To review the mark ups of specific authors, click on **Show Markup**  in the **Tracking** group, point to **Reviewers** and select the names from the list.

SHOWING AND HIDING THE REVIEWING PANE

The **Reviewing pane** appears as a separate window that displays a list of the revisions made throughout a document. The **Reviewing pane** is like a quick reference to all of a document's

revisions, with each revision categorised according to the part of the document it belongs to, such as the main document or footer, for example. Each revision type is also colour-coded.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W876 Tracking_6.docx...

- 1 Ensure that **Track Changes**  is active in the **Tracking** group on the **Review** tab
- 2 Click on the drop arrow  for **Reviewing Pane**  in the **Tracking** group

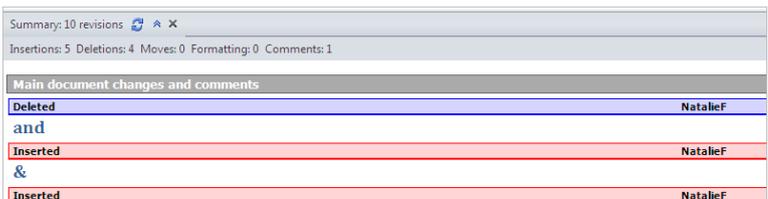
There are two placement options for the pane: horizontal and vertical...
- 3 Select **Reviewing Pane Vertical** to display the pane on the left side of the screen

The revisions for the current document are listed...
- 4 Click on **Reviewing Pane**  in the **Tracking** group to hide the pane
- 5 Repeat step 1 and select **Reviewing Pane Horizontal** to display the pane at the bottom of the window
- 6 Repeat step 3 to hide the pane once more
- 7 Save the document

3



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For Your Reference...

To **show and hide** the **Reviewing pane**:

1. Click on the **Review** tab
2. Click on the drop arrow  for **Reviewing Pane**  in the **Tracking** group
3. Select an option from the list

Handy to Know...

- Click on **close**  in the top-right corner of the pane to hide the **Reviewing** pane.
- When you have selected the **Inline** revision style and then insert a new comment, the **Reviewing** pane will be displayed and you will type the comment into the **Reviewing** pane.

ACCEPTING AND REJECTING CHANGES

One obvious benefit of tracking changes is that you can browse the revisions and choose to either **accept** or **reject** those changes. Once a revision is accepted, it is incorporated into the

text and revision marks are removed. When a change is rejected, the original text is restored and any revisions are removed. These changes become permanent once the document is saved.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W876 Tracking_6.docx...

- 1 Ensure that **Track Changes**  is active in the **Tracking** group on the **Review** tab
- 2 Click on the revised text **and** in the heading
This indicates which revisions you want to accept or reject...
- 3 Click on **Reject**  in the **Changes** group
Word will reject the change by reinstating the original text, and then move to the next change...
- 4 Repeat step 3 to remove the inserted text and move to the next revision
- 5 Click on **Accept**  in the **Changes** group
Word will make the change and move to the comment...
- 6 Repeat step 3 to reject the comment
- 7 Accept the next 4 changes, then reject the final change
You will receive a message that there are no comments or tracked changes...
- 8 Click on **[OK]**, then save and close the document

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Energy and ~~&~~ Business

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Energy and Business

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The design of the building is of major concern with respect to the amount of external heat entering the building and therefore how hard the air conditioner will need to work to maintain the set temperature. In poorly designed buildings, some simple ways of reducing this effect include:

- insulation
- double glazing
- window tinting or reflective coating
- window coverings (e.g. blinds, shutters etc)

As well as gaining heat from outside of the building, objects within the building can also generate heat and you should look to minimise this. Internal heat gain may be induced by:

- lighting
- equipment
- occupants

High Efficiency Motors (HEM)

High efficiency motors are those that are efficient energy savers. By replacing standard motors with high efficiency motors, substantial savings can be made. The other benefits that they carry include:

7

For Your Reference...

To **accept** or **reject** a revision:

1. Click on the revision, then click on the **Review** tab
2. Click on **Accept**  or **Reject** 
3. Click on **Track Changes**  to turn this feature off when finished

Handy to Know...

- Right-click on a revision to display a shortcut menu and select to **Accept** or **Reject** the change.
- Select a portion of the document containing multiple revisions, then right-click and select **Accept** or **Reject** to accept or reject all changes.