WORD 2013

Collaborating in Word

Word 2013 makes it easy for project teams to collaborate on drafting documents. Team members can exchange documents across the country as easily as they can across the hall. In addition to the ability to insert comments in a document, Word has several features that make collaboration activities more efficient. For example, Word can track all of the changes made on a document by each team member and combine these changes into a single document for review. In this lesson, you will work with these collaboration tools.

CASE STUDY: COLLABORATING ON A MANUAL

Raritan Clinic East is a pediatric medical practice serving patients ranging in age from newborn to 18 years. As a member of the human resources department, you have been finalizing the company manual, and it's now ready for review. As others review the manual, they will use Word's collaboration tools to mark suggested changes. Some reviewers will insert comments to identify their recommendations, while others will use Word's Track Changes feature to mark suggested edits. Some will highlight text to identify wording that needs revising. Your task will be to review all suggested edits and comments and finalize the document for printing.

LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Use the highlighter tool
- Work with Track Changes and comments
- Send Word emails
- Use AutoSave and AutoRecover

LESSON TIMING

- Concepts/Develop Your Skills: 2 hrs 30 min
- Concepts Review: 15 min
- Total: 2 hrs 45 min

Using the Highlighter

Word's highlighter pen works just like its real-life counterpart (except that you can easily erase the highlighting). The pen applies a transparent color to the background of the text. You apply a highlight by selecting a highlight color and dragging over text, or you can select the text and then click the Text Highlight Color button to apply the color to the selected text.
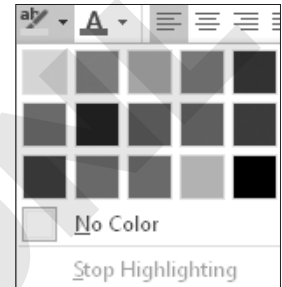
The Text Highlight Color pen offers a variety of highlighting colors, so you can color-code the highlights you use in a document if you wish. For example, you might highlight a note to yourself in yellow and a "waiting for information" reminder in green.

DEVELOP YOUR SKILLS WD01-D01
Highlight Text

Before You Begin: Navigate to the student resource center to download the student exercise files for this book.

1. Open **WD01-D01-PolicyManual** from your **WD2013 Lesson 01** folder and save it as `WD01-D01-PolicyManual-[FirstInitialLastName]`.

2. Make sure the insertion point is at the beginning of the document.

3. Search the document for *Pediatric General Medicine*, and position the insertion point at the beginning of the first line where the text appears on page 2.

4. Type this text: `Chin has more information about these specialties:` then tap [Spacebar]

5. Choose **Home→Font→Text Highlight Color** menu button ▼ and then choose **Bright Green** from the gallery.

6. Drag the pen across the text you just added to highlight it.

7. Choose **Home→Font→Text Highlight Color** to turn off the pen.

8. Press [Ctrl]+[End] to move to the end of the document.

9. Type this text: `Check with Finance to see if they have information to add.`

10. Select the sentence, choose **Home→Font→Text Highlight Color** menu button ▼, and then choose **Yellow**.

11. Select the sentence again.

12. Choose **Home→Font→Text Highlight Color** menu ▼.

13. Choose **No Color** to remove the highlight.

14. Click **Undo** enough times to remove both added sentences.

15. Save the file and leave it open.

Tracking Changes to Documents

The Track Changes feature is one of Word's most useful collaboration tools. You can electronically distribute copies of a document to different team members, and with Track Changes, Word marks the changes they make. You can merge the changes from all copies into a single document, and you can then review each change and accept or reject it.

Reviewers can also use Word's Comment feature to leave messages in a document as a means of communicating and collaborating with the originator.

Steps in a Typical Editing and Reviewing Process

Following are the steps showing how a typical review process might progress in today's world of requests for instant feedback.

THE EDITING AND REVIEW PROCESS		
Step	**Description**	**Performed by**
1	You send an electronic copy of the document via email to all those who need to review it.	You
2	Each reviewer makes revisions to the copy of the document. Word's Track Changes feature marks the edits and identifies the date and person making the edit, as well as the type of revision made.	Reviewers
3	Reviewers return the edited document to you.	Reviewers
4	After receiving all copies of the document, you can review each document manually and accept or reject the edits, or you can combine all edited documents into one document so you have one document that contains all edits from all reviewers.	You

Viewing Tracked Changes

Word offers options for viewing edits made to documents using Track Changes.

- **Inline:** Edits are marked directly within sentences and paragraphs. Text that is deleted by the reviewer is colored and marked through with a line, and text that is added appears underlined and in a different color.

- **Balloons:** Comments and edits appear in balloons on the right side of the document text. Each balloon identifies the person who made the edit as well as the type of edit made—inserted text, deleted, and so forth.

Tracked changes shown in line with the text

Patient·Management·Procedures¶

→ It·is·important·that·standard·management·procedures·be·used·to·maintain·the·standards·of··· treatment·that·each·patient·deserves.·These·procedures·are·described·in·the·following·page.¶

for·each·patient·is·determined.·When·schedule/room·changes·occur,·the·supervisor·and·practicum· student·are·notified·via·the·Notice·of·Schedule/Room·Change·Form.·Children·must·be· accompanied·to·the·appointment·by·the·custodial·parent·or·legal·guardian.·If·unable·to·attend,·the· parent·or·legal·guardian·must·sign·a·Release·expressing·permission·for·the·services·to·be·

Suzanne Student
Deleted: (see·Appendix·B)

Suzanne Student
Deleted: (see·Appendix·C)

Tracked changes shown as balloons in the Markup Area

The following table describes different ways you can display tracked changes and comments.

DISPLAY OPTIONS FOR TRACKED CHANGES AND COMMENTS	
Show Markup Views	**Description**
Show all revisions inline	■ Deleted text appears in the document body with a strikethrough font; added text is underlined in the document body. ■ Comments highlight the selected text, and you read the comment by hovering the mouse pointer over it. ■ Moved text uses a strikethrough font at the *moved from* area, and it appears underlined in the body of the document in the *moved to* area.
Show revisions in balloons	■ Deleted text, comments, and formatting changes appear in balloons in the Markup Area to the right of the document being reviewed. ■ Added text is underlined in the body of the document. ■ Moved text appears in a balloon at the *moved from* area; it appears underlined in the body of the document in the *moved to* area.
Show only comments and formatting in balloons	■ Comments and formatting changes appear in balloons; all other changes appear inline.

The descriptions in the preceding table relate to working in a view called All Markup. Variations occur when you make other viewing choices. You will learn about viewing choices later in this lesson.
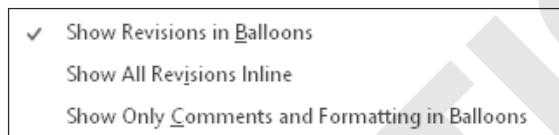
The Show Markup Balloons menu provides options for displaying marked changes.

Setting the Username and Initials

The Track Changes feature uses information set up in the Word Options dialog box to identify your username for edits you make to a document. As a result, whenever you collaborate on a document where Track Changes is used, it is important to make sure your username and initials are set correctly.

Setting Reviewer Ink Colors

Track Changes can use different colors to distinguish the edits of each reviewer who works on the document. Each reviewer can specify colors for his or her comments and tracked changes. This makes it easier to rapidly identify changes submitted by a specific reviewer. It also allows you to keep a consistent color for a reviewer you work with frequently, rather than settling on colors Word may assign automatically.

In the Formatting and Insertions examples (square with red on top and blue on the bottom), Word will automatically assign colors.

Track formatting

Formatting:	(none)		Color:	By author	
Insertions:	Underline		Color:	By author	
Deletions:	Strikethrough		Color:	Bright Green	
Changed lines:	Outside border				
Comments:	By author				

Bright Green was chosen in the Deletions example.

The Comments example is set up for Word to automatically choose the color.

DEVELOP YOUR SKILLS WD01-D02

Change Tracking Colors, Username, and Initials

1. Choose **Review→Tracking→dialog box launcher** ⌐, and then click the **Advanced Options** button.

2. Follow these steps to choose options for your reviewer ink color settings.

ⓐ Set the color for Insertions to **Blue**.

Insertions:	Underline		Color:	Blue	
Deletions:	Strikethrough		Color:	Red	
Changed lines:	Outside border				
Comments:	Teal				

ⓑ Set the color for Deletions to **Red**.

ⓒ Set the color for Comments to **Teal**.

ⓓ Click **OK** once.

3. Click the **Change User Name** button at the bottom of the Track Changes Options dialog box, enter your username and initials, and click **OK** twice.

Adding Comments to a Document

Word's Comment feature is a great collaboration tool. It allows reviewers and originators to communicate about a document by posting comments to each other. A reviewer might want to point out the reason for a deletion, for example. You can place comments in the body of a document, in a balloon in the Markup Area to the right of the document, or in the Reviewing Pane, which you can position at the side or bottom of the Word window. Word displays the name of the comment's author and the date and time the comment was inserted.
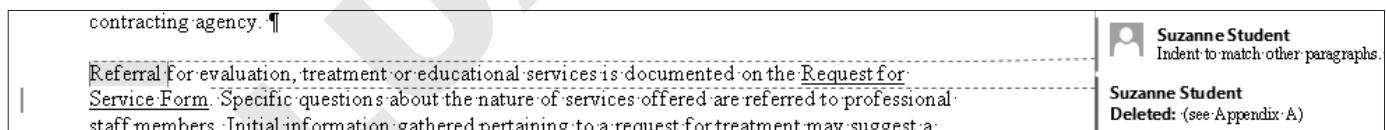
Suzanne Student 2 minutes ago
This phrase sounds awkward; please consider rewording.

Margarita Leone A few seconds ago
How does it sound now?

Suzanne Student A few seconds ago
Yes, I like that!
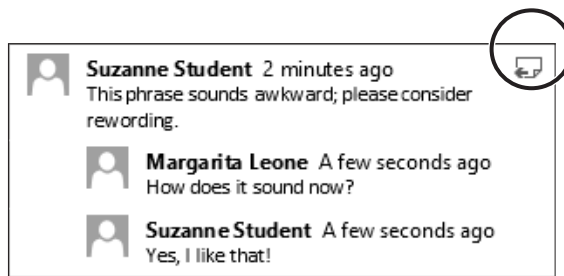
The reply button in the comments balloon allows threaded conversations between the originator and reviewers.
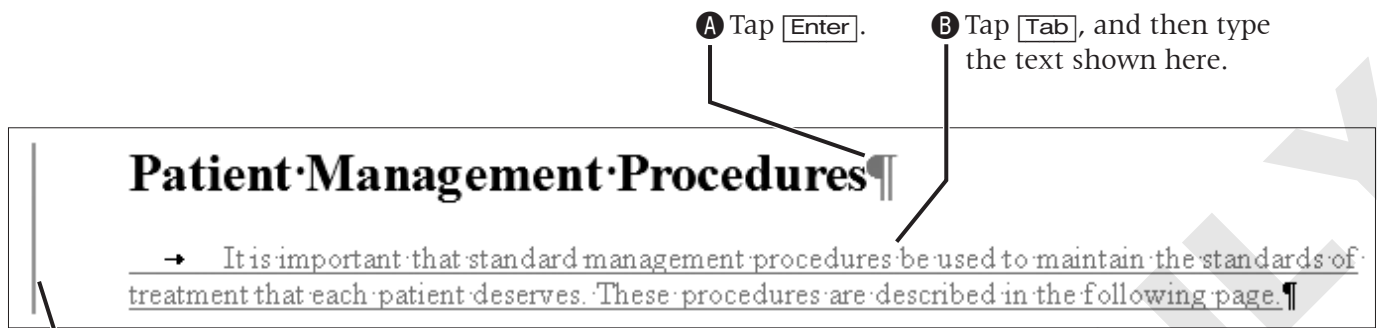
DEVELOP YOUR SKILLS WD01-D03
Work with Track Changes

1. Save your file as **WD01-D03-PolicyManual-[FirstInitialLastName]**.

2. If necessary, choose **Review→Tracking→Display for Review** then choose **All Markup** form the menu.

3. Choose **Review→Tracking→Track Changes** .

4. If necessary, display formatting marks.

5. If necessary, choose **Review→Tracking→Show Markup→Balloons→Show Revisions in Balloons**.

6. Scroll to **page 2**. In the last paragraph on the page, select *Referral* at the beginning of the paragraph.

7. Choose **Review→Comments→New Comment** .

8. Type this text in the comment balloon: **Indent to match other paragraphs.**

9. Locate and select the text *(see Appendix A)* in the next line; delete it.

contracting agency. ¶

Referral for evaluation, treatment or educational services is documented on the Request for Service Form. Specific questions about the nature of services offered are referred to professional staff members. Initial information gathered pertaining to a request for treatment may suggest a

Suzanne Student
Indent to match other paragraphs.

Suzanne Student
Deleted: (see Appendix A)

10. Follow these guidelines to continue with deletions:

   ■ Search for the word *see* to locate each additional cross-reference to an appendix.

   ■ Delete the cross-references for **Appendices B–K**.

   ■ Delete extra spaces between words where appropriate.

11. Search for *Patient Management Procedures*, then position the insertion point at the end of the heading.

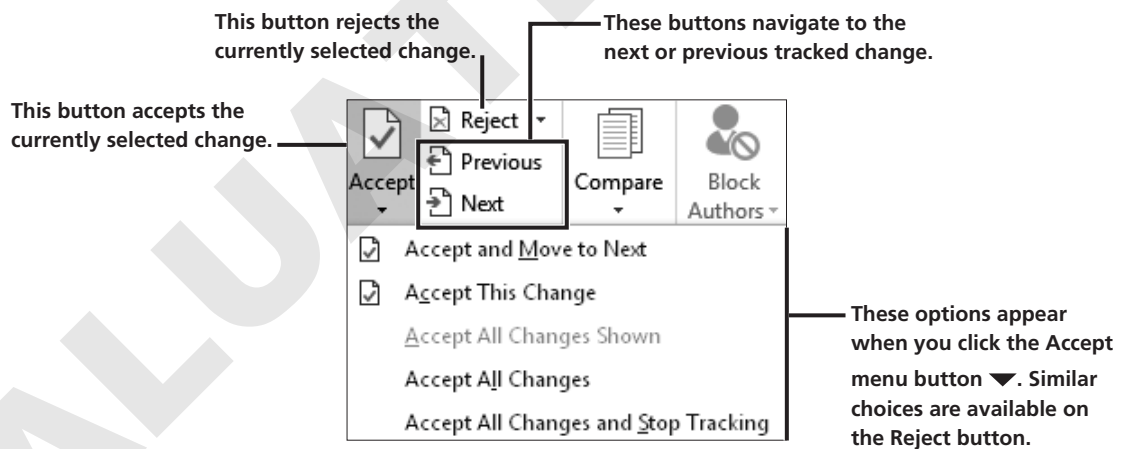**12.** Follow these steps to insert introductory text for the heading:

Ⓐ Tap ⎡Enter⎤.   Ⓑ Tap ⎡Tab⎤, and then type the text shown here.

Patient·Management·Procedures¶

→   It is important that standard management procedures be used to maintain the standards of treatment that each patient deserves. These procedures are described in the following page.¶

C Notice the gray change bar in the left margin that helps locate changes.

13. Save the file and leave it open.

Reviewing Tracked Changes

Word makes it easy to find and review changes to a document. When you review changes, Word jumps from one change to the next, giving you the opportunity to accept or reject each change. You can also accept or reject all changes at once. After you accept or reject a change, Word removes the revision marks.

This button rejects the currently selected change.

These buttons navigate to the next or previous tracked change.

This button accepts the currently selected change.

☒ Reject ▾
⤶ Previous
⤷ Next

Accept ▾

Compare ▾   Block Authors ▾

☑ Accept and _M_ove to Next
☑ A_c_cept This Change
Accept All Changes Shown
Accept A_l_l Changes
Accept All Changes and _S_top Tracking

These options appear when you click the Accept menu button ▾. Similar choices are available on the Reject button.

Displaying Tracked Changes

Word allows you to display tracked changes in four distinctive views. Depending on the type of detail you want to focus on, each view offers specific advantages. For example, you may want to view how the document would look after the changes are incorporated. In this case, you would choose the No Markup option. If you want to see how the document looked before any changes were made, you would choose Original.

All Markup ▾
Simple Markup
All Markup
No Markup
Original
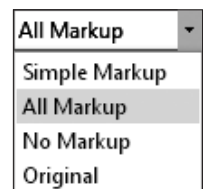
VIEWS FOR TRACKED CHANGES	
Markup	**Description**
Simple Markup	Shows where a change occurred with a red change bar in the margin. Clicking the change bar displays the markup details.
All Markup	Shows all markups.
No Markup	Hides all markups and displays a final document appearance with the proposed changes.
Original	Shows the original document appearance without the changes.

DEVELOP YOUR SKILLS WD01-D04
Review Tracked Changes

1. Save your file as **WD01-D04-PolicyManual-[FirstInitialLastName]**.

2. Choose **Review→Tracking→Display for Review 🖹 menu ▼**, choose **Original**, and scroll through the document.

3. Choose **Review→Tracking→Display for Review 🖹 menu ▼**, choose **All Markup**, and scroll through the document.

4. Choose **Review→Tracking→Display for Review 🖹 menu ▼**, choose **Simple Markup**, and scroll through the document.

5. Choose **Review→Tracking→Display for Review 🖹 menu ▼**, choose **No Markup**, and scroll through the document.

6. Position the insertion point at the top of the document.

7. Choose **Review→Changes→Next 🔁**.

8. Choose **Review→Changes→Accept ☑**.

9. Choose **Review→Changes→Accept ☑**.

10. Choose **Review→Changes→Accept ☑**.

Suzanne Student 5 minutes ago
Formatted: Normal

11. Choose **Review→Changes→Next 🔁** to skip the comment and move to the next change, the Deleted reference to Appendix A.

12. Choose **Review→Changes→Reject ⊠**.

13. Reject each deleted reference to an appendix.

14. Choose **Review→Comments→Delete 🗎**.

15. Choose **Review→Tracking→Track Changes 📝** to turn off the feature.

16. Position the insertion point at the beginning of the paragraph starting with *Referral* (bottom of page 2) and tap `Tab` to indent the first line.

17. Save the file and keep it open.

Saving and Sending Files

Before reviewers can do their job, you must decide how to get the document to them. You can use the Internet to share your document several ways, including the following:

- Email
- Network drive

This lesson uses email as the method for sharing files.

Sharing Files via Email

Sharing files via email is a simple procedure, but as with any process, it has its strengths and weaknesses.

PROS AND CONS OF SHARING VIA EMAIL	
Strengths	**Weaknesses**
■ No Microsoft Account ID is required	■ Managing several versions of the same document can be time consuming
■ Most users are already familiar with using email	■ Large documents containing video, audio, or other linked files can be problematic to email
■ Attaching a document to an email is a simple process	■ Each reviewer must have Word installed to edit the document or insert comments
■ As reviewers must have Word, they can add comments directly to the document	

The Share tab of Backstage view contains an Email option that includes commands to attach the current document as a Word file, a PDF file, or an XPS document. When you choose one of these options, Word displays an email form with the file attached. You just need to address the email and type your message. You can also change the Subject line, which defaults to the name of the file you are sending.

The Outlook message window (with document automatically attached) waiting to be addressed

Selecting an Email Program

When you use the send via email directly from Word feature, your email message is automatically created and the document automatically attached to the message. Word works with any email program or webmail service that you can select from the Windows Control Panel. If you want to change the default email service, you should make this selection before starting Word. Some email services (for example, most webmail services) don't support attaching the presentation automatically, so you must do so manually.

Naming Reviewer Copies

Experience shows that it works best to name each copy of a document sent for review with the reviewer's name. Then, as the documents are returned from review, it's easy to track which reviewer sent each one.

DEVELOP YOUR SKILLS WD01-D05

Send a Document for Review

1. Choose **Review→Tracking→Track Changes** 📝.
2. Choose **File→Share→Email** ✉ and then choose **Send as Attachment**.
3. Follow these steps to complete the email form:

Ⓐ Enter your actual email address here (don't type the text shown).

Ⓑ Verify that the attachment appears here.

Ⓒ Add this message for the reviewers.

4. Send the email.
5. Choose **Review→Tracking→Track Changes** 📝 to turn it off.

Reviewing Changes from Multiple Reviewers

If you set up a document to track changes, you can send copies of the document for review by others. As these reviewers make revisions, Word tracks their changes. When the reviewers send you their edited copies, you can combine the tracked changes into a single document. Word marks each reviewer's changes in a different color, so you can recognize input from different reviewers. After the changes are merged, you can navigate through the combined document and accept and reject edits from all users at one time. In fact, by seeing the edits from all reviewers in one document, you will be able to identify the trouble spots in the document, because different reviewers may try to modify the same area of the document.

# Reviewing a Summary of Proposed Changes

The Reviewing Pane summarizes reviewer changes in a window that you can scroll through to examine the proposed changes. When you click a change in the Reviewing Pane, the document scrolls to the location of the change so you can see it in context.
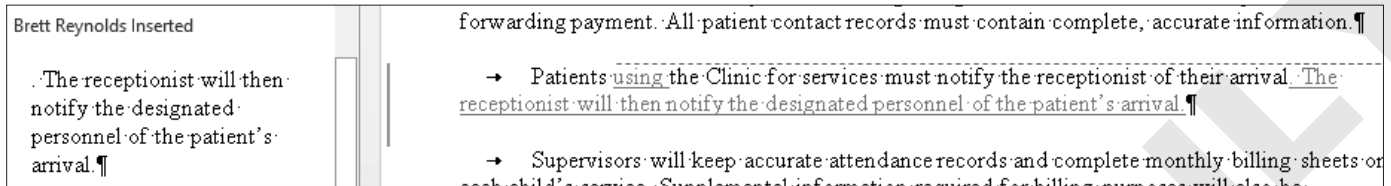
The Reviewing Pane on the left with the document scrolled to the selected change

Showing Source Documents

There are different views you can use to compare the original with reviewed documents. The view you choose is a matter of personal preference. You may find that you switch views depending on the type and extent of a reviewer's changes. It may be helpful, for example, to display the original and the marked documents side by side for comparison purposes, or hide the summary of changes list to get a larger view of the combined document.
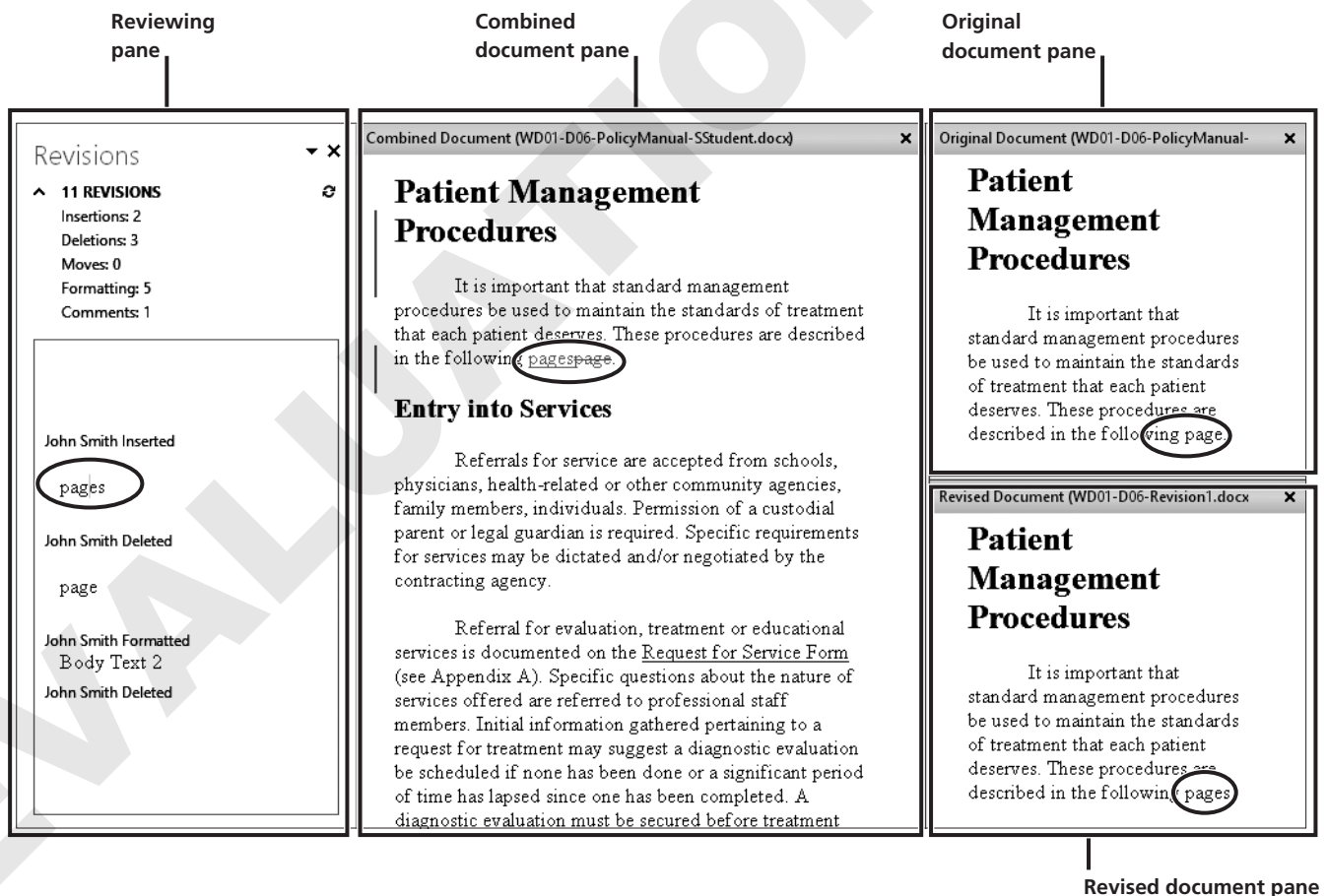
SOURCE DOCUMENT VIEWS	
Option	Description
Hide Source Documents	Displays the original document with the reviewer's changes embedded.
Show Original	Displays the original side-by-side with the marked document. The documents scroll simultaneously for easy comparison.
Show Revised	This view displays the original with the reviewer's changes embedded in the original next to the reviewer's tracked changes document.
Show Both	This view displays the unmarked original, the marked reviewer document, and the original with the reviewer's changes embedded.

Displaying Specific Markups

Word offers numerous options for displaying tracked changes for combined documents. For example, you may want to look at only the insertions and deletions suggested by reviewers. Word stores one set of formatting changes at a time. If you don't need to keep track of formatting changes, you may wish to turn off the Formatting option so Word won't prompt you to choose whether to keep the original formatting or the formatting from the reviewer's copy.
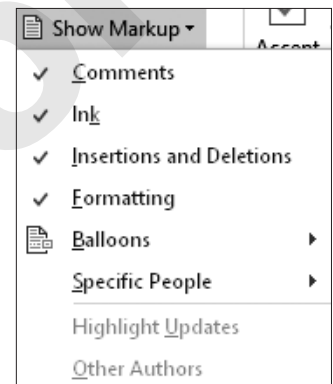
Displaying Specific Reviewers

If you combine two reviewer documents with the original, you can choose to see changes from both at once, or you may wish to focus on the proposed changes from just one reviewer, which you can do by removing the checkmark in front of the other reviewer's name.

DEVELOP YOUR SKILLS WD01-D06
Combine Tracked Changes from Two Reviewers

1. Save your file as **WD01-D06-PolicyManual-[FirstInitialLastName]**.

2. Choose **Review→Compare→Compare** and then choose **Combine**.

3. Follow these steps to begin combining documents:

Ⓐ Choose **WD01-D06-PolicyManual-[FirstInitialLastName]** here.

Ⓑ Click **Browse** and open **WD01-D06-Revision1** from your **WD2013 Lesson 01** folder.
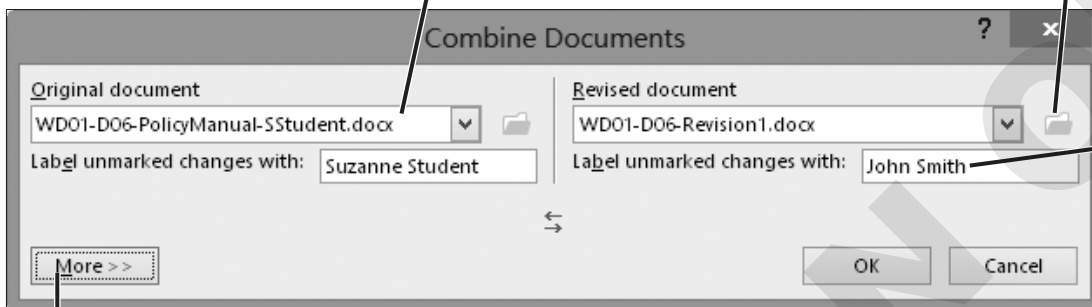
Ⓒ If necessary, type **John Smith** here so you'll know who suggested any unmarked changes.

Ⓓ Click **More** to expand the dialog box.

4. Follow these steps to control document display:

Ⓐ Ensure that **Word Level** is active.

Ⓑ Choose **Original Document**.

Ⓒ Click the **Less** button to collapse the dialog box; click **OK**.

5. Choose **Review→Compare→Compare**, slide the mouse pointer to **Show Source Documents**, and then if necessary, choose **Hide Source Documents**.

6. Repeat the procedures outlined in steps 2–4 to combine the second reviewed document named **WD01-D06-Revision 2** with the original document.

7. Type **Brett Reynolds** in the **Label Unmarked Changes With** field.

8. Click **OK**.

9. If necessary, choose **Review→Tracking→Reviewing Pane** menu ▼ and then choose **Reviewing Pane Vertical**.

10. Scroll down the Reviewing Pane to the suggested change by Brett Reynolds, where he deleted *attending*.

11. Click *attending* in the Reviewing Pane and notice that Word scrolls the document to the location of the change.

12. Click **Close** ⊠ at the top of the Reviewing Pane.

13. Press Ctrl + Home to move to the top of the document.

14. Use techniques learned earlier in this lesson to review all changes to the document:

- Delete all comments and accept all formatting changes.
- Accept all edits by John and Brett with one exception: On page 3, John deleted a space between *(see Appendix B)* and *Children*. Reject that change.

15. Save the file as **WD01-D06-Combined-[FirstInitialLastName]**, and then close it.

Comparing Documents

Sometimes documents that are sent for review are returned with no visible edits. Reviewers might turn off Track Changes so that the edits they make are not immediately evident. To determine whether edits have been made, you can use Word's Compare feature. It enables you to merge two documents into one file; then Word examines each document and automatically marks up the document using Track Changes so that you can locate edits.

Combining or Comparing Documents?

The basic procedures are the same for comparing and combining documents, but each command has a different use.

The Combine command allows you to combine the *tracked* changes from *one or multiple* reviewers in one document, and then you can go through the single document to accept or reject the changes.

The Compare command is designed for comparing two documents: *one* edited version of a document, where the reviewer *did not* use Track Changes, and the original. If you attempt to use the Compare feature to add a second reviewer's document, Word will advise you that it will automatically accept the first person's changes before comparing the second edited document. Thus, you won't have the option of accepting or rejecting changes from the first reviewer.

DEVELOP YOUR SKILLS WD01-D07

Compare Two Unmarked Documents

1. Open **WD01-D06-PolicyManual-[FirstInitialLastName]** from the **WD2013 Lesson 01** folder and save it as **WD01-D07-PolicyManual-[FirstInitialLastName]**.

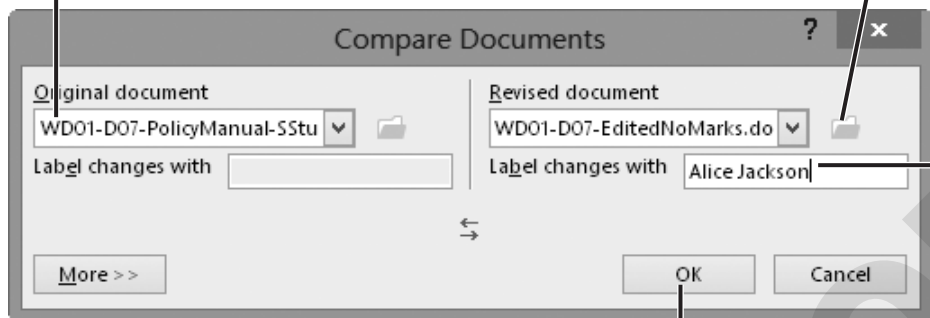**2.** Choose **Review→Compare→Compare** 📄 and then choose **Compare** from the menu.

3. Follow these steps to compare this file with another document:

Ⓐ Choose **WD01-D07-PolicyManual-[FirstInitialLastName]** here.

Ⓑ Click **Browse**, navigate to the **WD2013 Lesson 01** folder, and open **WD01-D07-EditedNoMarks**.

Compare Documents

Original document

WD01-D07-PolicyManual-SStu

Label changes with

Revised document

WD01-D07-EditedNoMarks.do

Label changes with   Alice Jackson

Ⓒ Type **Alice Jackson** here to identify the reviewer.

More >>   OK   Cancel

Ⓓ Click **OK**.

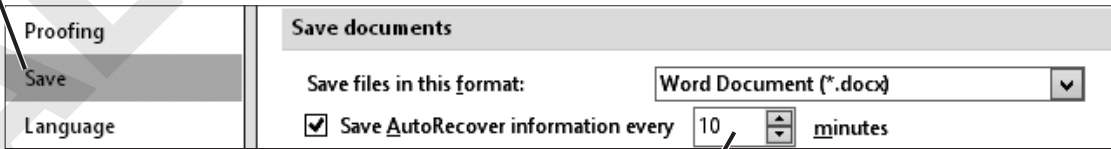**4.** If you are prompted to continue with the comparison, click **Yes**.

5. Scroll through the document and observe Alice's edits.

6. Save the file as **WD01-D07-AliceEdits-[FirstInitialLastName]** and then close it.

# Using AutoSave and AutoRecover

As you work, Word automatically saves your document every ten minutes by default. Whether you close a file without saving or something causes Word to close before you complete your work, the ability to retrieve the document is important. Word allows you to restore the last autosaved copy of the document the next time you open the file.

You choose this option in the Word Options dialog box to work with Word's Save settings.

| Proofing | **Save documents** |
| Save | Save files in this format: Word Document (*.docx) |
| Language | ☑ Save AutoRecover information every 10 ⬍ minutes |

You can change the frequency of automatic saving here.

The automatically saved versions of your opened document appear in the Info screen in Backstage view. You can compare or restore a specific version.
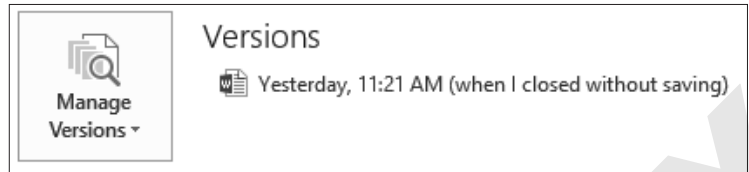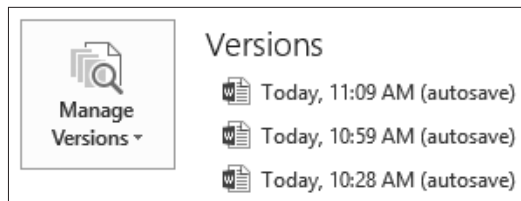
When you choose the version you want to open, Word displays an alert bar.

This option compares the selected autosaved version to the currently open version. Word marks differences between the versions using Track Changes.
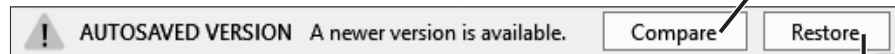
This command abandons the current version and opens the autosaved version.

Recovering Unsaved Documents

You can also recover recent unsaved documents using the Recover feature. If you are creating or editing documents and you accidentally lose your connection to Word, you can still recover all edits made to the documents up through the last autosave. Here are some guidelines for recovering these files.

■ If the document was one that had already been saved and named, Word displays the autosaved version in the Document Recovery task pane when you open the original file again. You can view the autosaved version to determine whether it is more recent than the original to help determine which version to keep.

■ If the document is a new document that has not yet been saved, you can use the Recover Unsaved Documents command in the Info screen in Backstage view. Word displays a folder containing all unsaved files, and you can open each one to determine if it is the document you created and lost. An alert bar will prompt you to save a recovered document if you wish to keep it.
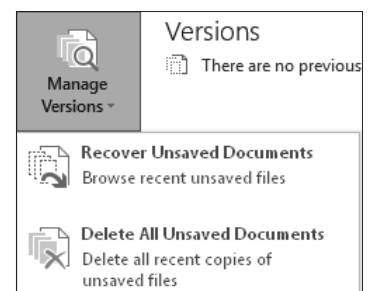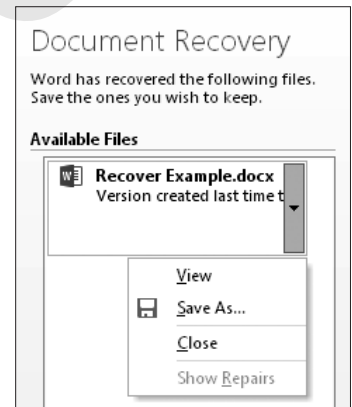
DEVELOP YOUR SKILLS WD01-D08
Work with AutoSave Versions

1. Open **WD01-D07-PolicyManual-[FirstInitialLastName]** from your **WD2013 Lesson 01** folder and save it as `WD01-D08-PolicyManual-[FirstInitialLastName]`.

2. Choose **File→Options** to open the Word Options dialog box.

3. Choose the **Save** category in the left-hand pane.

4. Follow these steps to ensure options are set:

   Ⓐ Ensure that the **AutoRecover** option is checked.
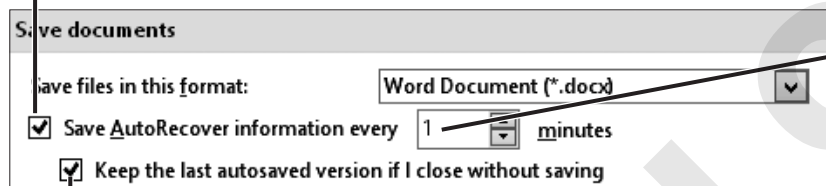
   Ⓑ Set the minutes to **1**.

   Ⓒ Ensure that this option is checked.

5. Click **OK**, change the word *AND* in the title to an ampersand (&), and wait for at least one minute.

6. Choose **File→Info→Versions** and review the information.

7. Choose **File→Options**, and then choose **Save** in the left-hand pane.

8. Change the AutoRecover duration to ten minutes and click **OK**.

9. Save and close the file.

Concepts Review

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz on the student resource center.