Document Collaboration

for Microsoft Word 97/98

Document collaboration is a term which refers to the development and review process to create a document by multiple individuals.

Prepare a document for review

With Microsoft Word, you have several options for sending a document to review and for tracking, incorporating, and keeping a record of changes made.

- If you have a document that you want reviewed by your team and you want final control over which changes to accept or reject, you can prepare copies of a document and distribute the copies to others for electronic review and markup.

  Word uses *revision marks*[1] to track changes so that after the document is reviewed, you can see the changes and *comments*[2] made by each reviewer. You can merge each reviewer's comments and changes into the original document so that you can review and accept or reject each change. You can send a copy to each team member simultaneously or route a single document so that each reviewer sees the previous reviewers' changes and comments.

- If you have a document that may be revised in the future by you or others, you can set up the document so that Word saves a "snapshot" of the current version automatically each time you or another reviewer closes the document after making changes. All versions are stored within one document, although Word displays only the current version by default. For each version in the document, Word records the date and time the version was saved and the name of the person making the changes. You can view any one of the previous versions in a separate window by opening that version from the Versions dialog box.

Prepare copies of a document to be reviewed and merged

1. Open the document you want to prepare for review.

2. Check whether the document contains multiple versions by clicking **Versions** on the **File** menu. If multiple versions exist, save the current version as a separate document with a different name, and use this copy as the review copy. Otherwise, reviewers can open and view previous versions of the document.

3. On the **Tools** menu, click **Protect Document**.

4. To let others change the document and insert comments and to track all changes with revision marks, make sure **Tracked Changes** is selected. To let others insert only comments and not change the contents of the document, click **Comments**.

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[1] *revision mark* A mark that shows where a deletion, insertion, or other editing change has been made in a document. Word can track changes in one of two ways: by marking the revisions as you make them, or by marking the revisions later when it compares the two versions of the document.

To specify whether Word should show tracked changes and how you want inserted, deleted, and changed text to appear, click the Track Changes tab in the Options dialog box (Tools menu).

[2] c*omment* A note or annotation that an author or reviewer adds to a document. To view comments online, rest the pointer over text shaded with light yellow. Word displays the comment and the name of the comment's author in a ScreenTip above the shaded text. If comments don't appear, click Options on the Tools menu, click the View tab, and then select the ScreenTips check box. Note that in previous versions of Word, comments were referred to as "annotations."

To let only authorized reviewers add changes and comments, type a password.

5. Send the document to others for review via email or copy the document to a shared network drive.

Notes

*   If a document is not protected with a password, anyone can unprotect the document (by clicking Unprotect Document on the Tools menu) and then make changes that will not be tracked.

*   You can quickly send a document for online review by clicking Send to Mail Recipient on the Reviewing toolbar and then entering the names of the reviewers in the message header (requires MAPI mail client such as Outlook 98.)

Set up versioning to automatically save a version on close

1. On the **File** menu, click **Versions**.

2. Select the **Automatically save a version on close** check box.

3. Click **Close**.

Review a document

You can review documents online by typing in comments and proposed changes. Word tracks each reviewer's comments and revisions in a distinct color to help the author distinguish between the different reviewers' marks.

When you insert a comment, Word numbers it and records it in a separate comment pane. You can view comments in ScreenTips or in the comment pane. You can also modify the comments you or others have made.

To enter proposed changes, turn on the Track Changes feature before you start reviewing the document. Word uses revision marks to show where you want text, graphics, or formatting to be added, deleted, changed, or moved. Later, the author can review and accept or reject each change.

Change the name or initials used in comments

Before you begin reviewing a document or adding comments you need to make sure that your workstation is setup to include your name and initials. Your name and initials are displayed when you make changes or add comments to a document.

1. On the **Tools** menu, click **Options**, and then click the **User Information** tab.

2. Type the name and initials you want in the **Name** and **Initials** boxes.

Note   The information you type in the **User Information** dialog box is used by all Office applications. For example, if you're using the change tracking feature in Microsoft Excel, this name appears in the ScreenTip above the change.

Insert a comment

1. Select the text or item you want to comment on, or click at the end of the text.

2. On the **Reviewing** toolbar, click **Insert Comment** .

3. Type the comment text in the comment pane at the bottom of the screen.

Note   If your computer has a sound card and a microphone, you can record voice comments. If you have a pen-equipped system, you can add pen comments.

Modify a comment

1. Click the light yellow text that's associated with the comment.

2. On the **Reviewing** toolbar, click **Edit Comment** .

3. Modify the comment in the comment pane at the bottom of the screen.

Track changes while you edit

1. Open the document you want to revise.

2. On the **Reviewing** toolbar, click **Track Changes** .

3. Make the changes you want by inserting, deleting, or moving text or graphics. You can also change any formatting. Word uses revision marks to show the changes.

4. To add a comment, click **Insert Comment** on the Reviewing toolbar.

Notes

- You can change the way revision marks look and work in a document by clicking Options (Tools menu), clicking **Track Changes**, and then modifying one or more of the options listed.

Incorporate reviewers' comments and changes

You can incorporate or delete comments that reviewers have inserted in your document.

- If reviewers propose changes using revision marks, you can accept or reject their suggestions.

- If change tracking was not used, and you have the original copy of a document, you can review the changes by comparing the edited copy with the original copy.

Incorporate suggestions made with comments

1. On the **Reviewing** toolbar, click **Edit Comment** .

2. In the comment pane, select the comment text or item.

3. On the **Edit** menu, click **Copy**.

4. Click in the document where you want the text or item to appear.

5. On the **Edit** menu, click **Paste**.

Delete a comment

1. Display the comment you want to delete.

2. On the Reviewing toolbar, click Delete Comment . Word automatically renumbers any remaining comments.

Incorporate or reject changes made with revision marks

You can review tracked changes in two ways: by using the Reviewing toolbar or the Accept or Reject Changes dialog box. To review changes by using the toolbar, first make sure changes are highlighted on the screen. If the ScreenTips option is turned on, you can see who made each change by resting the pointer over the highlighted revision.

- If revision marks don't appear in the document, point to Track Changes on the Tools menu, and then click Highlight Changes. Select the Highlight changes on screen check box.

- If the reviewer information doesn't appear above the change when you rest the pointer over it, click Options on the Tools menu, click the View tab, and then select the ScreenTips check box.

To	Do this
Review one change at a time	Click **Next Change** or **Previous Change** on the **Reviewing** toolbar.
Accept the change	Click **Accept Change** .
Reject the change	Click **Reject Change** .
Accept or reject all changes in one pass	On the **Tools** menu, point to **Track Changes**, click **Accept or Reject Changes**, and then click **Accept All** or **Reject All**. If you change your mind, you can click **Undo**.
See how the document would look if you accepted all changes	On the **Tools** menu, point to **Track Changes**, click **Accept or Reject Changes**, and then click **Changes, without highlighting**.
Display the original, unchanged document so you can see how the document would look if you rejected all changes	On the **Tools** menu, point to **Track Changes**, click **Accept or Reject Changes**, and then click **Original**. However, if the document contains formatting changes, Word displays the changed formatting, not the original formatting.

Compare two copies of a document

1. Open the edited copy of the document.

2. On the **Tools** menu, point to **Track Changes**, and then click **Compare Documents**.

3. Locate and click the name of the original document, or type its name in the **File name** box.

4. Click **Open**.

5. Accept or reject the changes.

Notes

- You can change the color and other formatting Word uses to mark changed text and graphics. For more information, click .

- If you've used the **Versions** command on the File menu to save multiple versions of the document in one file and you want to compare the current version with an earlier one, then you must first save the earlier version as a separate file under a different name.

Save a version of a document as a separate file

1. On the **File** menu, click **Versions**.

2. Click the version of the document you want to save as a separate file.

3. Click **Open**.

4. On the **File** menu, click **Save As**.

5. In the **File name** box, enter a name, and then click **Save**.

Combine comments and changes from several reviewers into one document

1. Open the copy of the original document into which you want to merge changes.

2. On the **Tools** menu, click **Merge Documents**.

3. Locate and click one of the documents that has changes to be merged, and then click **Open**.

4. Repeat steps 2 and 3 until all copies of the document are merged.

5. Review the comments and accept or reject the changes made.

Notes

- If you didn't set up the document you sent out for review for change tracking, but you have the original copy of the document, you can still find where changes were made by comparing the edited copy with the original copy.

- If you used Microsoft Exchange to route copies of a document to multiple reviewers, double-click the document icon in the returned mail message to open the document. In the Merge Documents dialog box, click OK to merge the changes into the original document.

Ways to add comments and keep track of changes

The **Reviewing** toolbar contains all the common tools you need to revise documents online. You can easily insert or review comments; track, accept, or reject changes; and highlight text. To display this toolbar, point to **Toolbars** on the **View** menu, and then click **Reviewing.**

You can add comments to a document without changing the document text. Word inserts a comment reference mark and highlights the text you're commenting on. When you point to the text, the comment pops up above the text.

John Smith:
Provide full name:
Bryan Allen.

B. Allen, [JS3] the "pilot and engine"

To insert a comment, click the **Insert Comment** button on the **Reviewing** toolbar, and then type your comment in the comment window at the bottom of the screen.

When you track your changes while reviewing a document, the document's author can see where you've made changes. The author can then accept or reject each change. If more than one person is reviewing a document, Word marks each reviewer's changes with a different color.

Deleted text

Even though theThe Condor's frame had been made of lightweight aluminum, but its weight made it impossible

Changed line   Inserted text

To track your changes while editing, click the **Track Changes** button on the **Reviewing** toolbar.

Use the Reviewing toolbar

The Gossamer Albatross

Even though theThe Condor's frame had been made of lightweight aluminum, but its weight made it impossible for a person to keep it aloft for more than a few minutes.[JJ1]

Track changes

For the Albatross, MacCready replaced the standard aluminum tubing with hollow tube of carbon filament, which MacCready's team members made themselves. They used Mylar for the skin, just as they had on the Condor, but they "shrinkwrapped" it on the Albatross instead of letting it flap loosely, making it much more aerodynamic. [JS2]

Highlight text

B. Allen,[JS3] the "pilot   **Make comments**   atross, as he likes to refer to himself,

From: All Reviewers   Close   Comments

[JJ1] Run in this paragraph with paragraph below.
[JS2] Has this been verified?
[JS3] Provide full name: Bryan Allen.

Add, edit, and review comments

The comment window shows the comments that have been inserted into a document. You can edit and review comments in this window.

You can leave the comment window open while you work, or you can close it to see more of the document. To open the comment window, click the **Edit Comment** button on the **Reviewing** toolbar.

Use the **Highlight** button to emphasize text. When you send a document with highlighted text, others can easily scan the document and see important points.

Click the **Highlight** button, and then select the text you want to emphasize.