

GH Editorial Guide #2

Working with tracked changes and comments in Word

If you ask an editor or proofreader* to work on a Microsoft Word document, the chances are that they'll use the *Track Changes* function when editing it, and use the commenting feature to provide notes, advice, queries and so on.

The results can be daunting if you're not used to dealing with this kind of thing, especially if there are so many changes and comments that each page looks like a sea of red (it won't *necessarily* be red, though – we'll come back to that later).

However, once you've learned to deal with change tracking and commenting, you'll almost certainly see how valuable they are.

It's important to see exactly *what changes* the editor has made, rather than just looking at the overall results. Firstly, this makes it easier to check that the text still means what you intended it to mean. It also might help you to learn how to make better use of

wording, punctuation, formatting and so on in your future work, as you see the improvements that an editorial professional has made.

Also, comments from your editor will help you to understand *why* certain changes have been made. Queries are often essential in ensuring everything is right – the editor can't always be sure of your intended meaning, and therefore can't always simply make a correction or improvement without asking you about it.

The idea behind this guide is to help you to find your way around the change tracking and comments that you'll get from your editor, and to work out what to do with them as you work towards the finished product.

* *From here onwards, for simplicity, I'll use the word 'editor'.*

Graham Hughes



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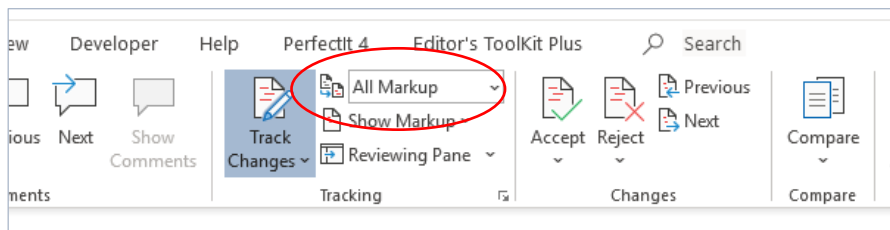
Please note: The detailed advice and screenshots in this guide are based on the Office 365 Business version of Word at the time of writing (Version 1905), running on Windows 10. Some details might be different in your installation, but hopefully not enough to make my suggestions difficult to follow.

Working with tracked changes

What you'll see

Using *Print Layout* (from the *View* menu) gives much better results than using *Draft View*, which doesn't provide such helpful visibility of tracked changes and comments. From here on, I'm assuming you will use *Print Layout*; if you don't, some things will turn out differently.

A further way of controlling what you will see is the *Display for Review* function, which you'll find in the *Review* toolbar (though I recommend also adding it to your [Quick Access Toolbar](#)). This gives you a drop-down menu, as you'll see here:



Your choices are:

- *Simple Markup* – Where there are tracked changes, you'll only see a marker in the left margin to indicate that they exist; you won't see what they are. Comments are shown.
- *All Markup* – Tracked changes are shown in detail (see *Types of tracking* below), along with comments.
- *No Markup* – The amended version of the text is shown, with no change tracking or comments.
- *Original* – The original version of the text is shown, with no change tracking or comments.

Types of tracking

There are three main kinds of tracking to look out for:

- **Insertions** – These appear *only* within the page itself, in red with underlining. If you just scan down the right-hand margin, you'll miss them, as it doesn't flag them up at all.
- **Deletions** – By default, these are shown in the right-hand margin, preceded by 'Deleted:'. (If you'd rather see them in the main text, use the *Show Markup* function in the *Review* toolbar, then select *Balloons*, and tick *Show All Revisions Inline* rather than *Show Revisions in Balloons*. This can produce messy results, though.)
- **Formatting changes** – These also show up in the right-hand margin, with 'Formatted:' followed by a description such as 'Font: Bold'. (unless you use *Show All Revisions Inline* as above, in which case they won't appear unless you hover your cursor over them).

This screenshot shows examples of all three types, with details of deletions and formatting changes appearing in ‘balloons’ in the right-hand margin (although these no longer have a balloon-like appearance in recent versions of Word):

Copy-editing or proofreading:

Copy-editing and proofreading are two separate stages in the process of preparing a book for publication. They have different remits and are usually done by different people.

Outside the publishing world, though, many people get these terms mixed up with each other (and with others such as ‘copywriting’).

If your work is very well written and in the required style, and it needs nothing more than an error check, proofreading will be enough (although it might well be done by editing a Word document, rather than marking up a PDF, which is how it’s conventionally done for publishers).

But if it might need improvements in the style and flow of the writing, or a more ‘professional’ tone, it should be *copy-edited* instead. You might want a service somewhere between the two, which could be thought of as ‘proof-editing’ or ‘light copy-editing’. Many editors and proofreaders are flexible about this.

Graham Hughes Deleted: that’s needed

Graham Hughes Deleted: e

Graham Hughes Formatted: Font: Italic

In the second paragraph, ‘up’ has been inserted.

In the third, ‘that’s needed’ has been deleted after ‘the required style’ (as indicated by the broken red line), and the ‘e’ in ‘then’ has been corrected to an ‘a’. This is worth remembering – if some text has been replaced, Word treats this as *two* changes (or *revisions*): a deletion and an insertion.

In the final paragraph, ‘copy-edited’ has been changed to an italic font.

If the right-hand panel is especially ‘busy’, Word might combine some insertions etc. into a single balloon.

Reviewing Pane

If you click on the *Reviewing Pane* option in the *Review* toolbar, this will bring up a panel on the left of the screen (or at the bottom if you open the *Reviewing Pane* menu and choose *Reviewing Pane Horizontal*). This will show the details of all the insertions, deletions, formatting changes and comments, like this:

The screenshot shows the Microsoft Word interface with the **Revisions** pane open on the left. The ribbon includes File, Home, Insert, Design, Layout, References, and Mailings. The Revisions pane shows a summary of 380 revisions: Insertions: 208, Deletions: 139, Moves: 0, Formatting: 6, and Comments: 27. Below the summary is a list of individual revisions:

- Graham Hughes Inserted: **f**
- Graham Hughes Deleted: **F**
- Graham Hughes Inserted: ,
- Graham Hughes Deleted: than
- Graham Hughes Inserted: of
- Graham Hughes Deleted: :
- Graham Hughes Commented: 'AUM' isn't defined anywhere in the paper. Need to be sure the readers will understand it.
- Graham Hughes Formatted: Style Footnote Reference + (Latin) Kalinga 10 pt Black, Font: (Default) Calibri, 11 pt, Font color: Auto

I usually find this pane unnecessary and distracting. It can be tricky and time-consuming to keep it in line with the main display, and it sometimes takes a while for the details to show up.

The statistics at the top of the pane can be useful, though, or at least mildly interesting.

Also, some of the longer or more complex deletions can be difficult to make out in the right-hand margin (sometimes Word automatically opens the pane in these instances); and, as mentioned earlier, a number of deletions and/or formatting changes might be combined into one balloon. In these cases, the *Reviewing Pane* can help to make things clearer.

Useful settings

The *Show Markup* function gives you a few options, including *Balloons* as mentioned above. For example, you might want to look at insertions and deletions only, not formatting changes: in that case, you can untick *Formatting* in the pop-up menu.

Other settings are uncovered if you click on the small arrow next to *Tracking*. The *Advanced Options* button brings up a range of controls over how changes are displayed, including the colouring. If there's some red text in your document, it might make sense to choose another colour for the change tracking and comments.

Accepting and rejecting changes

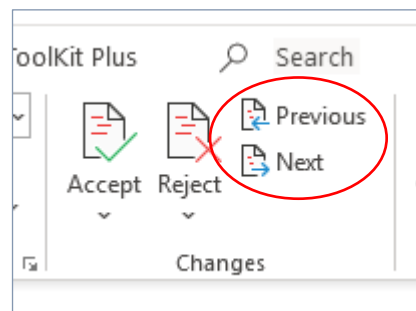
Now you know what tracked changes look like – but what are you going to do with them? This might depend on what you've agreed with your editor, but here I'm going to assume that you've got free rein to do with them as you wish.

Your ultimate aim will be to end up with a 'clean' document, with no tracked changes (or comments). But, for the reasons explained earlier, it's usually worth looking through the changes one by one, paying special attention to any that the editor has commented on.

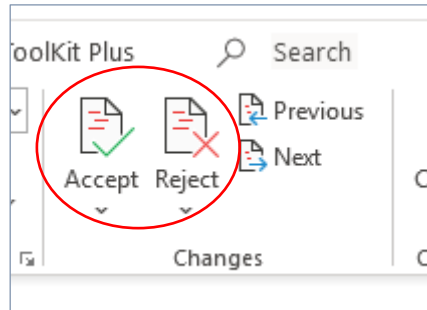
If you *accept* an insertion, deletion or formatting change, the tracking will disappear permanently – there will no longer be any trace of the original text or formatting.

If you *reject* it, this will also wipe out the tracking, but the *original* text or formatting will be restored.

To move on from one tracked change to the next, you can use the *Next* function in the *Review* toolbar. To go back to the previous one, use *Previous* instead. With either of these, if there's a comment between the current cursor position and the next/previous tracked change, it will find that instead.



Alternatively, you can choose a tracked change by clicking either on the relevant text in the body of the text, or on the balloon in the right-hand margin. Once you've selected a change, you can use the *Accept* or *Reject* button to carry out your chosen action, and you will then see the tracking disappear.



Using either of these buttons will then automatically move your cursor to the next tracked change or comment. If you don't want that to happen, there are alternative functions that will just accept or reject the change and leave the cursor where it is. These are in the respective drop-down menus that appear if you click on the downward arrow underneath the *Accept* or *Reject* button – their names are (a bit inconsistently) *Accept This Change* and *Reject Change*.

Accepting or rejecting every single change individually can be too long-winded at times. Instead, you can accept or reject a series of consecutive changes. To do this, just select an area of text that encompasses those changes, and use the relevant *Accept* or *Reject* function.

Taking things a step further, to accept or reject *all* of the changes in the document in one swift action – if you're really sure that this what you want to do – choose *Accept All Changes* or *Reject All Changes* from the relevant one of those drop-down menus.

If you change your mind or realise you've made a mistake, you can undo any accept or reject operation by using Ctrl + Z or the usual *Undo Typing* function.

One thing to look out for: if you accept or reject a change, or you edit something yourself, you might inadvertently delete a comment that was attached to the original text. If you notice this happening and decide that the comment should be kept, you can undo your action (see above) and then use one of various workarounds, for example:

- Copy the contents of the comment to the clipboard, redo your action, then add a new comment and paste the old contents into it from the clipboard (not very practical if there's been a reply to the comment).
- Reply to the comment, explaining to the editor (or whoever else might review the document next) what you intended to do, saying that you don't want to lose the comment just yet. At some suitable stage, someone should decide that the comment is no longer needed and it's time to repeat your intended action.

Working with comments

What are comments for?

Your editor might have used comments for various reasons, such as:

- explaining why they have changed something
- asking you to check that the meaning is still correct after they've done some rewording
- suggesting possible changes where something seems unclear
- asking you what something is intended to mean
- telling you that something has been duplicated or seems to be missing
- suggesting a better way to format some of the text.

Ways of working

You might have agreed to work with the editor in an interactive or iterative way – in other words, you will respond to their comments (and maybe accept or reject their tracked changes) by either changing the text or answering their queries, and will then send the document back to the editor for another round of editing, and so on until everything has been cleared up.

Alternatively, the editor might have just agreed to do a single edit (or 'pass') and leave the rest to you. In this case, they still might have asked you some questions in the comments, but

they'll be rhetorical ones. For example, if their query is 'Do you mean "XYZ"?', the idea is that *you* will consider whether you mean 'XYZ' and decide whether to change the text accordingly.

Replying to a comment

If you're going to send the document back to the editor with your responses to some of their comments, it's easy to add your replies.

Even if nobody else is going to see the comments, you still might find it useful to reply to them, to help you keep track of which ones you've dealt with and how you've done it – although the *Resolve* function (see below) is another way to do this.

First, move your cursor onto the comment in the right-hand margin. Then, either click on *Reply*, or right-click on your mouse and choose *Reply to Comment* from the menu. You can now type your response, and then exit from the balloon by hitting the *Esc* key or clicking somewhere else – your reply will still be there.

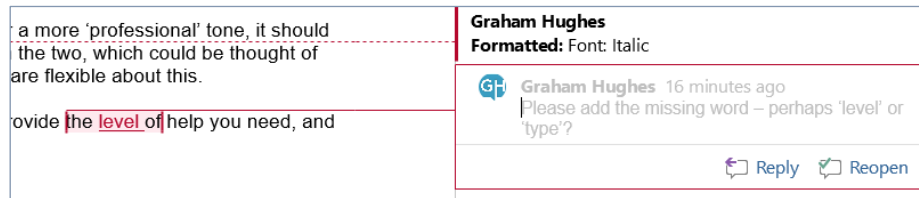
Resolving a comment

If there are any more than a handful of comments, it can be tricky to remember which ones you have dealt with and which are still outstanding.

To help with this, you can mark a comment as 'resolved', which will change its text from black to grey.

You can do this in a similar way to replying: move your cursor onto the comment; then either click on *Resolve*, or right-click

and choose *Resolve Comment* from the menu. The result will look like this:



As you can see in the bottom-right corner, the *Resolve* option has been replaced by a *Reopen* one. You can use this if you need to restore the comment to its old unresolved status, with the text appearing in black again.

If a comment has had one or more replies, you can either mark the whole series as resolved by using *Resolve* on the original comment, or just do this to an individual reply.

Deleting a comment

It's also a simple task to delete a comment or a reply to one. First, move your cursor to the comment or reply. Then you can either use the *Delete* option in the *Review* toolbar, or right-click and select *Delete Comment* from the menu that appears.

If you're working interactively with your editor, make sure you agree on whether or not you should delete comments, and at what stage. The editor might think it best to keep them all (perhaps with some marked as resolved) until everything has been finalised.

You can delete *all* the comments in the document in one go, if you're sure about doing so. To do this, click on the downward-facing arrow under *Delete* in the *Review* toolbar, then select *Delete All Comments in Document*.

Moving between comments

Finally, if the comments are thinly spread throughout the document, it might be useful to use the *Previous* and *Next* functions in the toolbar. These will move your cursor to the previous or next comment respectively.

Closing thoughts

Tracked changes and comments are valuable tools in helping you and your editor to work together productively. It's important to see what changes the editor has made (except, usually, the more trivial or cosmetic changes), and to be aware of their explanations, suggestions and queries.

Using these features can seem long-winded at times, and a screen that's badly cluttered with change tracking and comments can be difficult to work with. But it is worth the effort to learn how to use them effectively and efficiently.

It's useful to add the most frequently needed functions to your Quick Access Toolbar, or to make sure you have easy-to-remember keyboard shortcuts for them – for example: *Delete Comment*, *Next Comment*, *Next Change*, *Accept This Change*, *Reject Change*.

Key points

- Make sure you're clear about how you and your editor are going to interact with each other on change tracking and comments.
- Use a suitable view of the document (using both the *View* and *Display for Review* functions), so that you can see what you need to see, and no more.
- Remember that tracked insertions are only marked in the main text area, not in the right-hand margin.
- You can accept or reject changes either one by one, or as a group of changes in an area of text that you've selected.
- To help keep track of which comments you've dealt with, you can reply to them, mark them as resolved or delete them.

Further reading

- LibroEditing: [‘Working with Track Changes in a document’](#)
- Microsoft Office Help & Training: [‘Track changes in Word’](#)
- CyberText: [‘Word: Accept formatting Track Changes but not text’](#)
- Tips.Net: [‘Comments’](#)

GH Editorial is a service run by Graham Hughes, an editor and proofreader with a background in information technology.

Graham can work with many types of written material, but specialises in business documents and non-fiction books.

To learn more about Graham and how he can help you, please visit www.gh-ed.com or his Society for Editors and Proofreaders directory entry at www.sfep.org.uk/directory/graham-hughes.

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