

# **Collaborative Editing Issues and Tools in Word**

## **Why Use These Tools?**

Anyone who has had to gather comments and integrate multiple versions, sometimes with conflicting edits, into a single, publishable document knows this work can involve tedious comparison of different versions with scrutinizing care, and pain-staking text re-entry.

The organization involved in distributing copies of the file to those who should edit it, retrieving the various versions with their different comments and changes, and then integrating these into a single document is time consuming.

A common problem for reviewers is how to make their comments and changes stand apart from the body of the text and to communicate clearly what they are thinking with the editor responsible for the document. File management of various drafts can also become a problem.

Co-authoring or editing a document can be very cumbersome. In working with multiple authors, reviewers or editors, common problems include:

- How to share a file
- How to keep track of drafts and versions
- How to add comments and communicate opinions or issues without affecting how the body of the text reads
- How to call attention to changes made in the body of text
- How to gather changes and integrate multiple versions or edits into one final version.

In addition, keeping track of all of the versions created along the way takes up storage space and can lead to later confusion.

## **Solutions:**

There are several things that can make co-authoring or co-editing a document much easier:

- Choose one person as the coordinator who will produce the final version who has Word97
- Use one file among multiple users on a shared location on the network (such as S:/Departments, R:/Public/Share, R:/Students, etc.)
- Use Word's "revision tools" and its "reviewing toolbar" – once you learn how to use them, they make this work much easier:

## **Distributing the File Among Multiple Authors, Reviewers and Editors**

A successful editing project begins with smart file distribution. It is generally best for everyone to work on a single copy of the file when possible to save reentering the changes into another document later, and to ensure everyone is always editing the current version.

To distribute the file internally at UMBS, it is easiest to place one copy of the file in a shared location on the network. The editor responsible for the document should keep a second current backup copy as the work progresses. Everyone involved can use Word's revision tools to mark their changes and insert color-coded comments by name. The final editor can choose which comments to include, which changes to accept or reject, and easily produce the final version.

Be aware of the versions of software that the other authors\editors will be using, and save the file in the lowest common denominator file format (such as Word97).

Unless you relay a single file from one author to the next, you will end up with multiple edited versions that the editor responsible for the document will need to compile. It is simpler if everyone is responsible for a separate section, chapter, or sub-document, and more time-consuming if they are editing the same sections and chapters in different files. This is when a single file with Word's revision tools is very useful.

The editor responsible for the document may wish to coordinate edits by distributing a single version of the file sequentially, from one reviewer to the next, rather than simultaneously for their review at the same time. If multiple versions are distributed, the editor responsible for the document needs to facilitate communication and ensure the others are always reviewing the most recent copy.

When possible, it is preferable to divide responsibility by section, or to sequentially distribute a single copy of the file.

## Word's Revision Tools

### With Word you can...

- Track Changes – mark them on screen or on printed copy, and then you or another can choose to accept or reject them.
- Insert and delete comments to communicate with other reviewers
- Use toolbar button shortcuts on the Reviewing Toolbar for the most common commands
- Save and manage multiple versions within the same file and easily recall older versions for comparison.
- Work with Master and Sub Documents and manage multiple files from within one file
- Insert existing documents into your current document

### Tracking Changes:

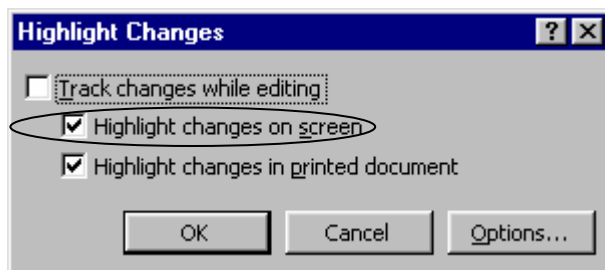
First you must turn on the Track Changes feature under Word's Tools menu. Turn it off if you wish to make changes that are unmarked. The editor responsible for the document can then see which changes you've made and choose to accept or reject each change.

### Word XP

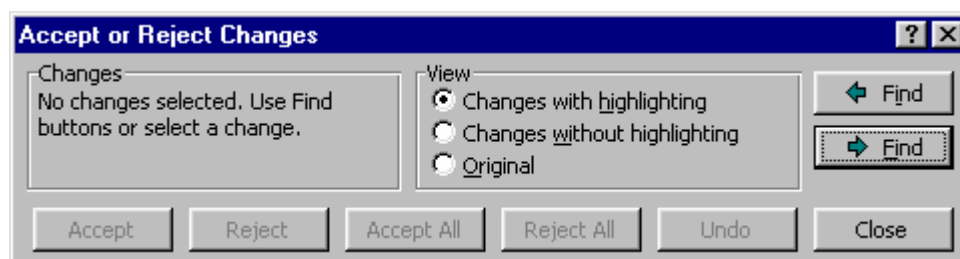
In Word XP, simply pressing Control + Shift + E will turn the Track Changes feature on and off. When the feature is turned on, you can right click on each change marked, and choose to Accept or Reject it.

### Older Versions of Word

To view changes, turn the marking feature on and off under the *Tools* menu -*Track Changes*. In older versions of Word, then choose *Highlight Changes* and checkmark what you'd like to do.



When changes are marked, you can rest your mouse over a change, and see who made it. You can scroll through the document from change to change and choose whether or not to keep them. This feature is under the *Tools* menu – *Track Changes* – *Accept or Reject Changes*. If you wish to accept your revisions and remove the marks, click on the *Accept All* button.



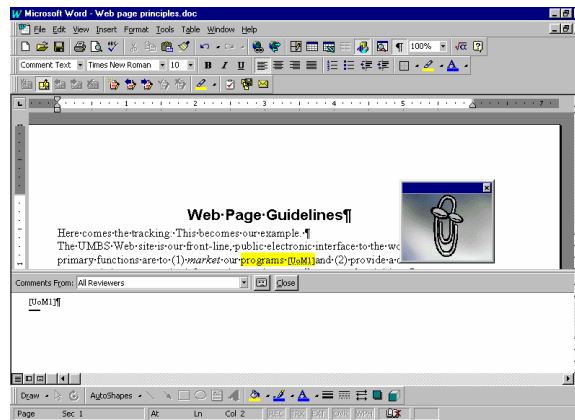


To add a comment:

1. Select the text to be annotated and then choose *Insert* menu – *Comment*.
2. Type your comment in the box that appears, then click on the *Close* button.

The text with the comment attached will be highlighted in yellow. Double click on this yellow text to reopen its comment to edit or add further comments.

From the *Reviewing Toolbar* you can also insert comments, edit comments, jump from



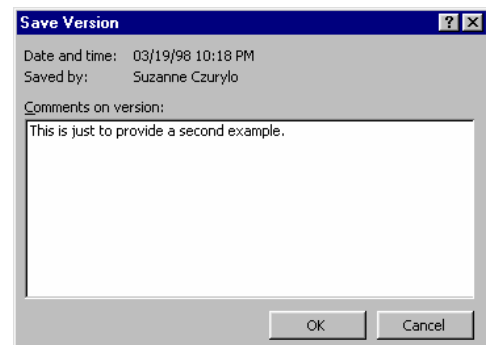
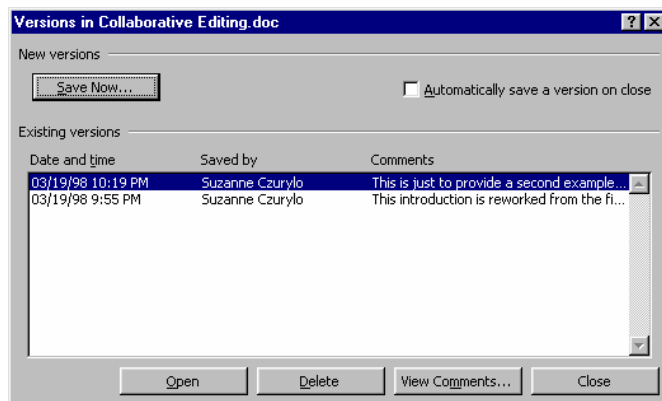
comment to comment, and delete the comments that is selected. You can also manage your comments by right clicking on them and choosing these choices from the shortcut menu.

If you wish to show or hide the fields with the reviewers' initials, click on the *Show/Hide* button on the Standard Toolbar.



## ***Saving Multiple Versions within the Same File***

Most people use the *Save As* command to save different versions of a document. Word allows you to save different versions within the same file. This is all managed under *File* menu - *Versions*:



Every time you want to create a separate version, choose the *Save Now* button in the *Versions* box.

You can easily return to previous versions by selecting them from the list in this box. If you open a previous version, it will split the Word window in two so you can easily compare it with the current version. If you want to actually change the earlier version, open it first and then choose *Save As* from the *File* menu to create a separate new file to edit.

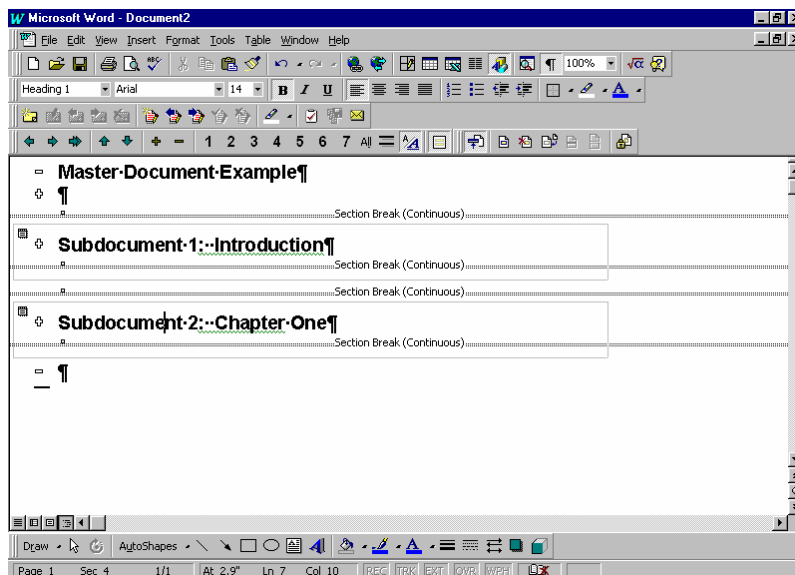
The *Versions* feature is very useful for keeping track of changes made by different reviewers when you select the "Automatically save a version on close" box under *File* menu – *Versions*. Every time every reviewer opens, edits, and closes the file, it will be saved automatically as a "version" that can be evaluated, and changes accepted or rejected, individually. This protects the original and each subsequent set of revisions.

## ***Inserting Master and Sub-Documents***

You can coordinate a large document by creating a Master document and then defining sub-documents that are saved as separate files but can be managed from within the Master document. You can either edit and manipulate each of the files independently or from within the Master document.

You can create a Master document from a new file, or turn an existing document into the Master. In the document you wish to be the Master, select *View – Master*. Then use the Master document toolbar that opens automatically to create, insert or remove subdocuments, as well as view different levels of the outline. Double clicking on the icon next to the left of the sub-document title will open the sub-document file for editing.

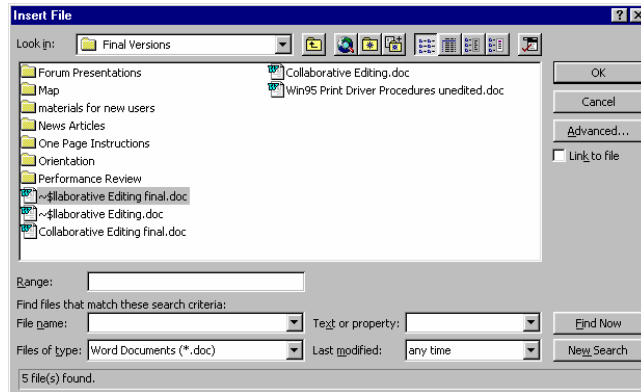
To create a subdocument from text originally in the Master document, select the text, and click on the *Create Sub-document* button on the Master toolbar. This creates a sub-document with section breaks above and beneath it within the Master document. Sub-document creation requires the use of heading styles. The name of the resulting new document is created from heading text, so you may need to do a little work to prepare your document with heading styles in advance if you find that this is causing problems when trying to create sub-documents.



It is sometimes useful to insert an existing document into the master document.

### ***Inserting Related Documents***

You can also insert a separate file into your current file from the *Insert – File* menu. The contents of the selected file will be inserted at the cursor’s location and will become part of the new file. The old file will still remain intact. This is a useful feature if multiple people create and submit different parts of what will be combined into one document.



These are some of the tools you can use to help you in your editing projects. The more you use them, the more tricks you will discover.