Revising and Reviewing Documents

Chances are that you'll create some documents on your own, but for other documents you'll need to work with other people—either sharing the documents on a network or via the Internet, or using e-mail to send the documents back and forth.

Word includes strong features for working together on documents. In this chapter, I'll start by reviewing your different options so that you're clear about the different choices. After that, I'll show you how to work on a document simultaneously with your colleagues—if you have the technology required—and how to share documents but work on them one person at a time.

Next, you'll learn how to use the Track Changes feature, also called revision marking, to track all the edits you and your colleagues make to a document so that you can keep an audit trail. You can then review the changes and decide which to keep and which to remove.

After that, I'll show you how to add comments to a document, how to compare two documents to identify their differences automatically, and how to incorporate changes from two or more copies of a document into a single file. Lastly, you'll learn how to dig into Word's archives to recover an old version of a document after something horrible happens to the current version.

Understanding How You Can Work on Documents with Your Colleagues

In Word, you can work on documents with your colleagues either together or separately:

- **Work on the same copy of the document simultaneously**: If you have a SharePoint site or you store documents on Windows Live, you and your colleagues can store the document on the site, each open it at the same time, and work on it together. Microsoft calls this *coauthoring*.

- **Work on separate copies of the document**: If you don’t have a SharePoint site, Word warns you when you’re opening a document that someone else is using. When this happens, you can decide whether to wait until your colleague stops using the document or whether to open a separate copy and then integrate any changes you make back into the main copy.

- **Circulate a copy of the document, and each work on it in turn**: This method is easiest, as you use only a single copy of a document, and each person has free rein
when they’re editing it—but it usually takes longer than the other methods. To see clearly which changes each person has made to the document, you’ll normally use Word’s Track Changes feature, as discussed in this chapter.

**Note** If you have a SharePoint site, chances are you will want to try simultaneous editing and see how well it works for you. But if you find that running into conflicting changes creates more problems than it solves, you may be better off using the older means of collaboration. Coauthoring is technically very impressive and it can be great in the right situation, but it’s not suitable for everyone.

Whichever way you work, you can use four main features for revising and reviewing documents with your colleagues:

- **Track Changes**: When you turn on this feature, Word tracks the insertions, deletions, formatting changes, and most other changes to the document. You can then view the changes, accept the changes you want to keep, and reject the others.

- **Comments**: You and your colleagues can attach comments to items in the document to offer opinions or suggest changes, without actually changing the text itself. You can then view the comments and remove them once you’ve dealt with them.

- **Document Compare**: This feature makes Word analyze and mark up the differences between two versions of the same document. Document Compare is useful when you need to amalgamate changes from two or more different versions in which you haven’t tracked changes.

- **Versions**: Word stores different versions of a document within the same file. You may sometimes need to go back to a previous version of a document to recover text that you or a colleague has deleted.

**Editing a Document Simultaneously with Your Colleagues**

Word’s most advanced way of working on a document with your colleagues is for each of you to open the same copy of the document at the same time, and all work on it together. Here’s what happens:

- **Create the document**: You create the document as normal (for example, by using a template) and store it on your SharePoint site or on Windows Live SkyDrive.

**Caution** Unless you have a fast and reliable Internet connection, simultaneous editing of a large document stored on Windows Live SkyDrive can be slow enough to make collaboration difficult.

- **Open the document**: The first person opens the document as normal. When another person opens the document, they see a pop-up message (see Figure 9-1)