Best Practices for Collaborating on Documents
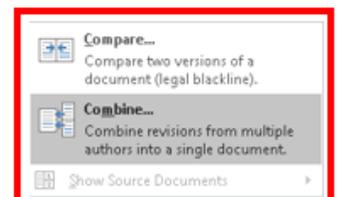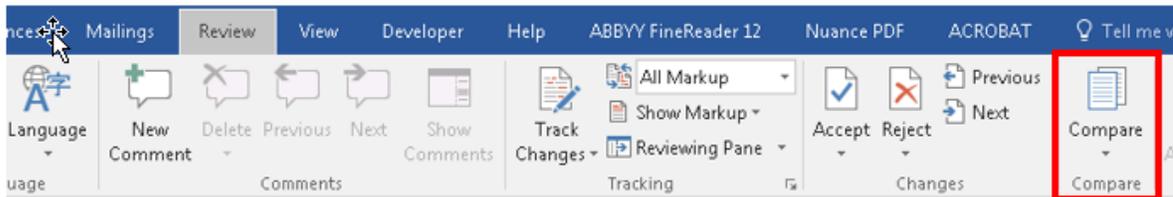
Merge Document Changes

This is for instances where you have several copies of the same document that have been edited. The key is to work with two documents at a time, reviewing all the changes and then bringing in the changes from the next document.

Review the two documents to ensure that there aren't too many comments in the same section that may lead to confusion (i.e. contradict each other). Also do a quick check to ensure that no major formatting issues were introduced by the reviewer, if so, you will need to fix the issues before moving forward. Using the 'draft view' option (found under **View Tab**, under **Views**) is helpful for viewing formatting that was applied.
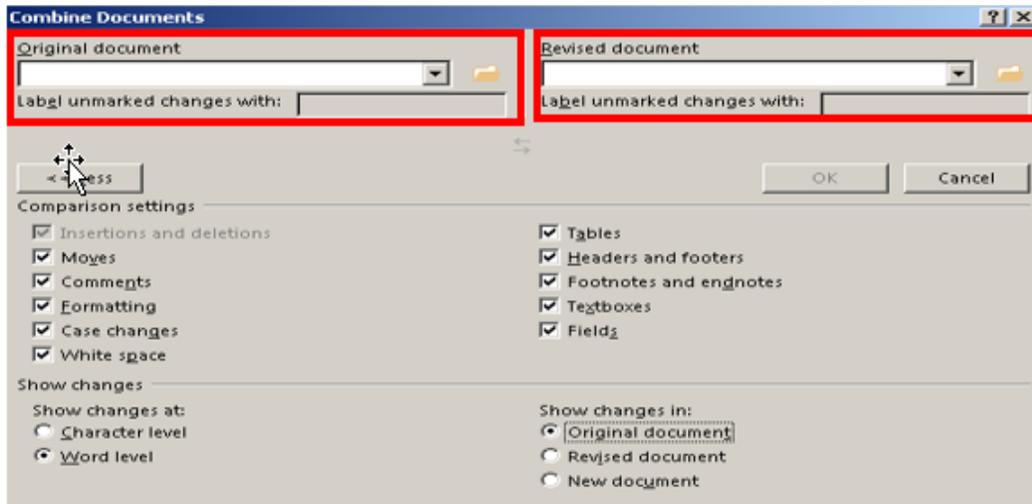
Update the TOC, LOT, and LOF with each merge.

Select the 'Compare' option (Review Tab)

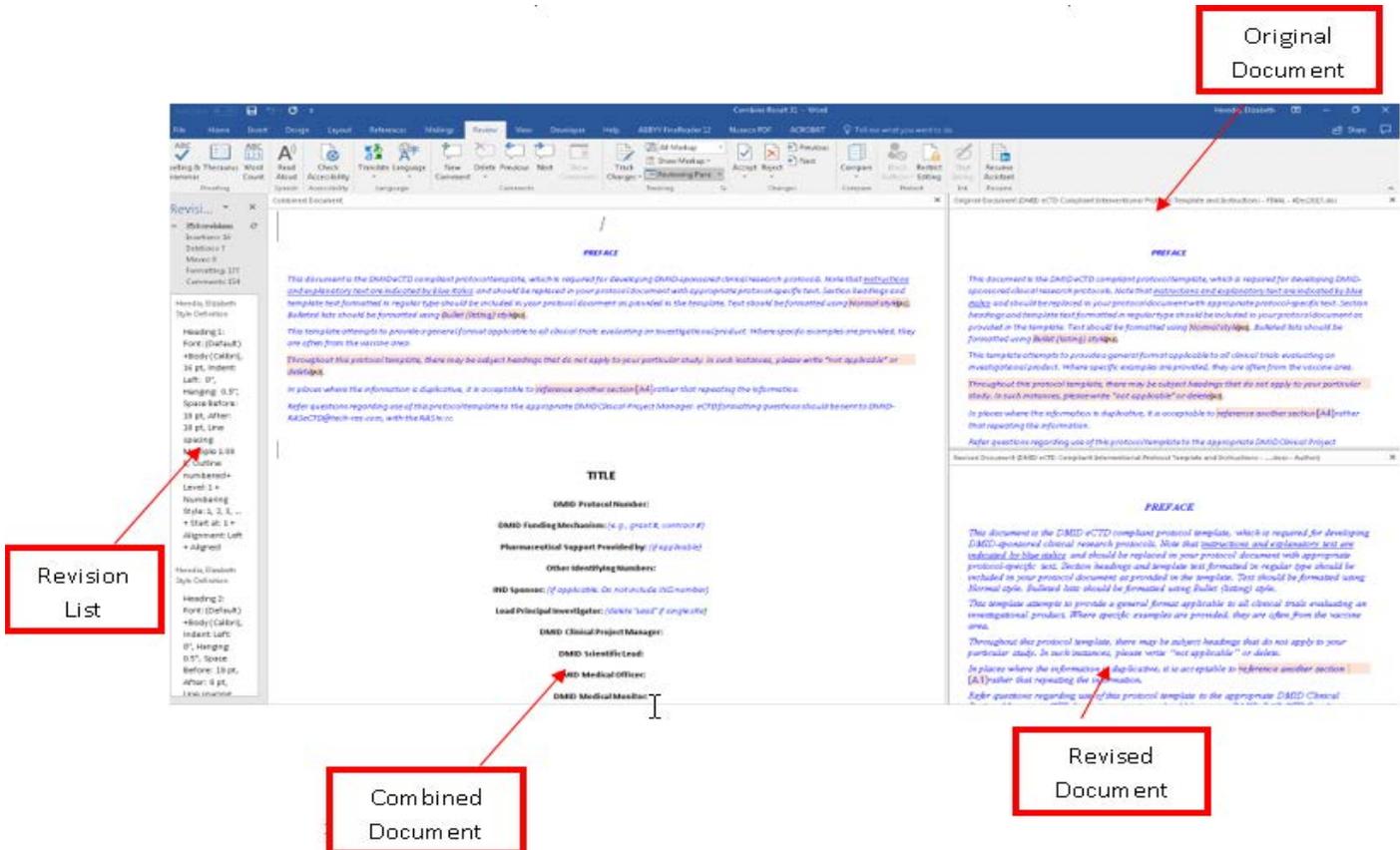1. Under the Review Tab, in the Compare Button, choose the Compare Option. Select the Combine Function.

2. Select the documents you want to compare.
   a. In the **Combine Documents dialog box**, select the original document (drop-down on the left side of dialog box).
   b. Select the revised document you want to compare to the original document (drop-down on the right side of dialog box).
   c. More Button: Displays Advance Formatting options. Choose the options you want to use.
      i. *Comparison Settings*: Options for displaying or hiding the various changes made to a document.
      ii. *Show Changes*: Allows you to select where you want to see the compared changes-in the original, revised or new document. By default, Word will show all the changes in a new document- this is the suggested way to view changes.
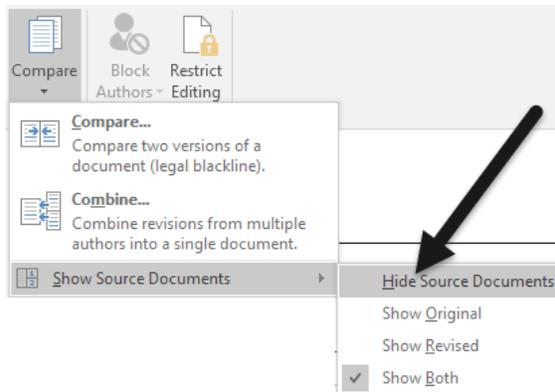
A new document will open that combines the original document and the revised one that was merged in. There are several different sections that are displayed:

- A scrollable list of revisions (left-hand side).
  - If you double-click on any of the headings, it will move the cursor to that exact position in the document.
- The combined document showing all the changes (center). Changes will appear as colored markups.
- The original (top, right-hand side) and revised Documents (lower, right-hand side).
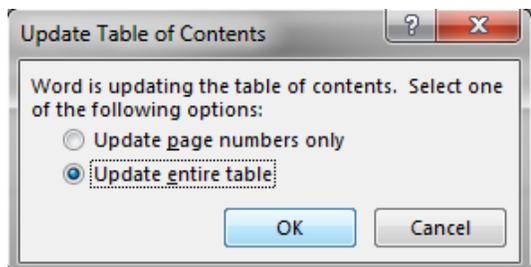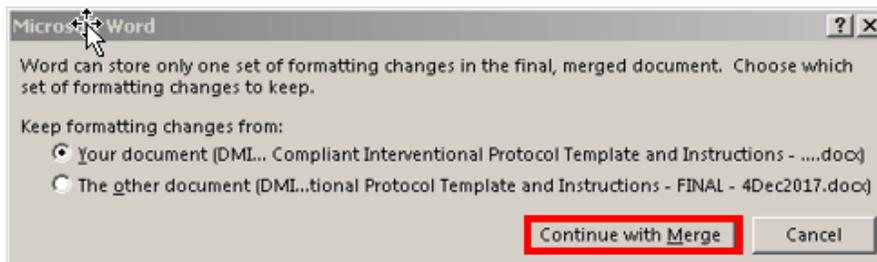
If you don't want to view all the documents at the same time, you can choose which document you want to view by clicking the Compare Button, Show Source Documents Option.

If there are formatting as well as text changes you will receive the following warning message. Word can only save one set of formatting changes at a time. You have the choice of keeping the changes from the original document or from the one you are currently merging.

Suggestion: Choose which document has the formatting that you need (if prompted). Select 'Continue with Merge'. [For example, if your original document is the document that has the proper formatting, then it is suggested to choose Your Document]. You will then be prompted to update the TOC, it is suggested to choose 'update entire table' if you want to update the page numbers and the text.

3. If you want to merge in more copies, save the document that contains the combined changes of the first two copes. Repeat the process using the most recently saved file as your original document, until all files have been incorporated into one final combined document. Formatting should be checked and updated each time you merge documents.
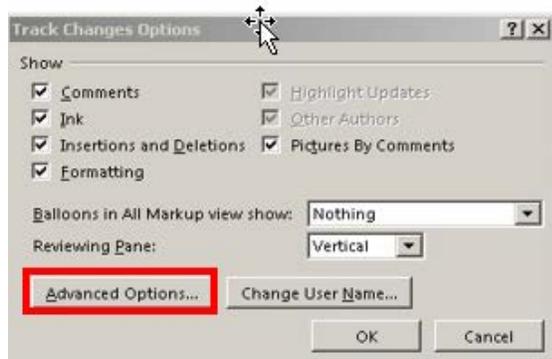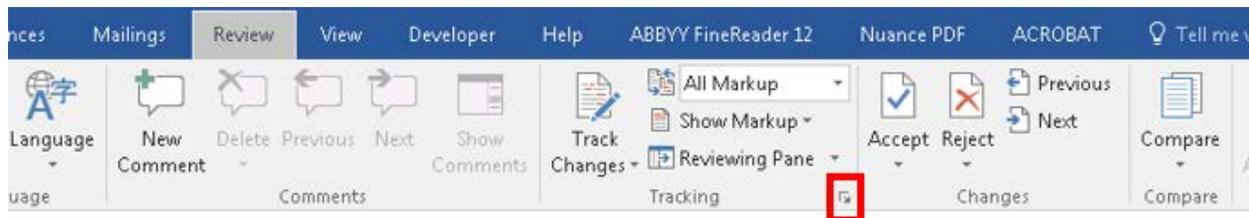
How to Review a Document (Tracked Changes and Comments)

Advanced Tracking Options

To change the Tracked Changes Options:

1. Under the Review Tab, in the Tracking Group, choose the arrow icon.
2. Select 'Advanced Options'.
3. The **Advanced Tracked Changes Options dialog box** appears. Choose the options you want to use.

This option allows you to control how different types of markups appear and how they are colored (insertions and deletions). You can also format and track different move actions, choose how changes are handled within a table (highlight inserted cells or deleted ones) and whether formatting is tracked.

Break Down of Options:

Markup

Shows how tracked changes are displayed for insertions, deletions, changed lines (vertical lines you see next to text that is changed) and comments.

- *Insertions and Deletions* can be viewed using a different color, underline feature (default for Insertions), or strikethrough feature (default for Deletions)
- *Changed Lines* can be viewed on the left border, right border or outside border of the document.
- *Comments* can be viewed by reviewer (each users comment is a different color).

Moves

Distinguishes when a section of text has been cut and pasted from one location to another in your document.

- *Track Moves* can be viewed using a specific color as well as change options (default is green with double strike-through and double underline).
- *Table Cell Highlighting* allows you to view various formatting options in the tables in various colors.
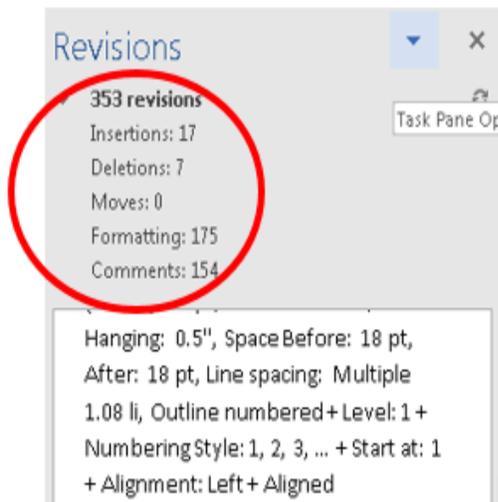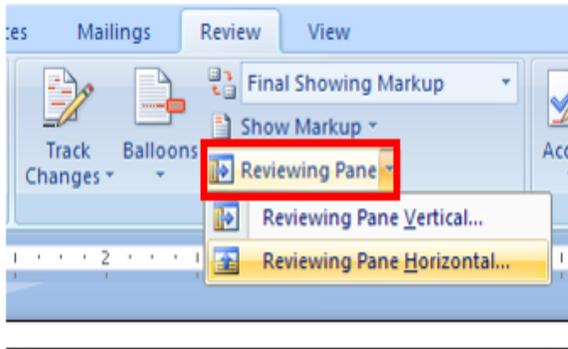
Formatting

Allows you to view formatting changes (font, size, tabs, margins, spacing, style etc.) in tracked changes.

Balloons

Allows you to format track changes itself. For example, it allows you to view changes as balloons in the margins of a document.

Summary of Tracked Changes:

Make sure the Reviewing Pane is turned on. This displays all of the changes that currently appear in your document, the total number of changes, as well as the number of each type of change. On the Review Tab, in the Tracking Group, select Reviewing Pane to view the summary.
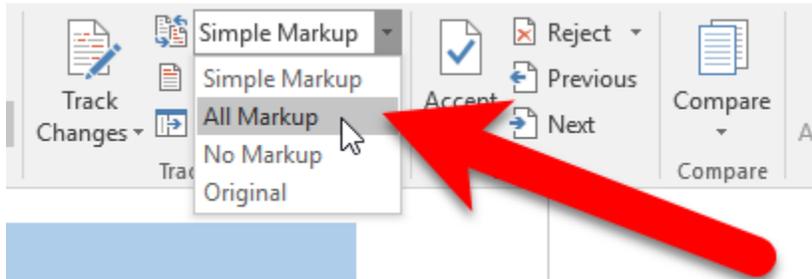

To review each tracked change and comment in sequence, use the previous and next options in the Review Tab, in the Changes Group. In this section you can also Accept or Reject changes. The Reviewing Pane will show you how many tracked changes remain in the document (see above screenshot).
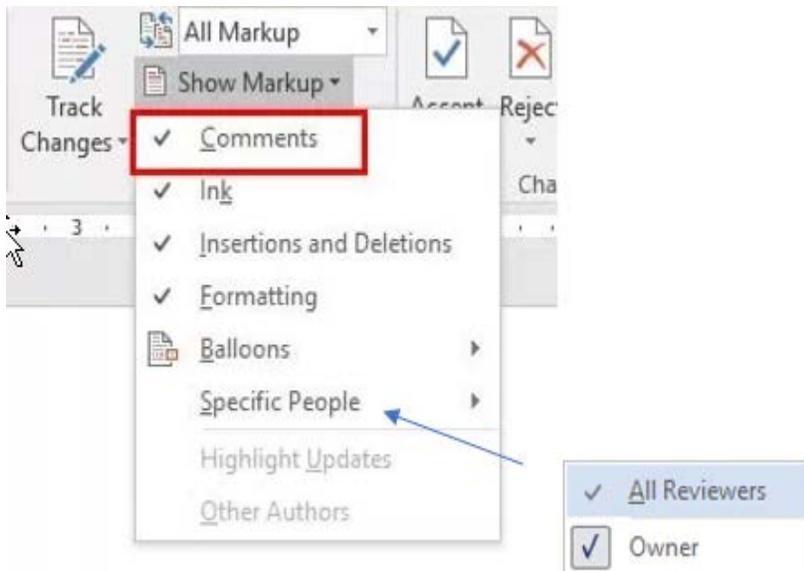
Review Changes by Type of Edit or by a Specific Reviewer

- *Simple Markup*: The default option in word. It indicates where the changes are with a red line in the margin.
- *All Markup*: Shows all tracked changes and comments in the document.
- *Markup*: Shows you the document with all the tracked changes accepted.

Show Markup

Allows you to control what markups you see. You can turn on or off markups for comments, insertions and deletions, formatting and even specific reviewers (from the list displayed).

Break Down of Options:

Comments

Shows comments that have been added to the document.

Ink

Shows markups created with a stylus tool. Not an option that is used often.

Insertions and Deletions

Shows what has been added and deleted from the original document.

Formatting

Shows what formatting changes have been made to the document.

Balloons

Shows changes as balloons in the margins of the document or as inline markups. Another option is to show only comments and formatting in balloons.

Specific Reviewers

Shows you changes of all reviewers or those you have selected to view.

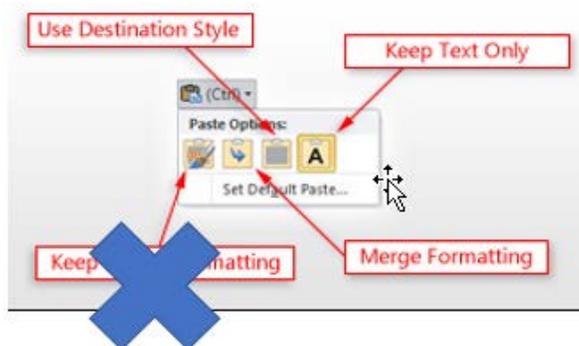# Copy/Paste into One Properly Formatted Document

Pasting Text with Tracked Changes

1. Open both documents.
2. From the source document, copy the information that you want to paste into the target document.
3. In the target document, click where you want to add the copied content and use one of the following options. The suggested method is to choose Merge Formatting.

Acceptable ways to copy/paste (to ensure the formatting is retained in the target document):
Note: DO NOT use the Keep Source Formatting Option or use 'Ctrl + V' to copy/paste.

- **Use Destination Styles:** Matches the formatting where you pasted your text.
- **Kept Text Only:** Discards both the text formatting and the non-text elements you copied, such as pictures or table, and then matches the formatting where you pasted the text
- **Merge Formatting**: Keeps the formatting of the text you copied without changing the formatting of the destination document, e.g., if you cut and paste a sentence from another document that had a different font type or size.

The key to this is that tracked changes has to be turned off in both documents you are working with. If tracked changes are not off in the original document prior to copying, Word assumes you want to copy the text as if the changes were accepted.

Managing Document Versions

Collaboration software such as Share Point, Google docs, One Drive, etc. allow multiple individuals to work on a document at the same time (i.e. co-authoring) in a controlled manner.

This type of platform allows a group of people to edit and revise the document in real-time.

- There is only one version of the document that everyone can work on.
- Every reviewer can see what work has been done, so you can decrease duplicate effort.
- It removes the need to merge documents or copy, paste, and reformat from multiple documents.
- The owner of the document can easily take the comments and make changes to the file as appropriate.
- It saves time spent finalizing the document and makes it easier to ensure you end up with a clean document.