Best Practices for Collaborating on Documents

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General Tips for Collaboration

The following tips should be considered when collaborating with your team on revising a document:

1. Track Changes – When editing a document, it's best to enable track changes to easily see and monitor changes made by others. This feature will also help to see if any formatting changes have occurred due to edits in the document.
2. Comments – Most documents allow you to attach comments to the text in the file. Comments are great for asking questions, getting clarification, and making recommendations.
3. Combine and Compare Changes – With this feature, you can review a previous version of the document next to a newer version and even merge changes.
4. Share files – Sharing files via email is one approach to team collaboration. But sometimes files are too large to send via email, and other times edits get lost in the constant back-and-forth and overlapping of edits. File-sharing through a cloud storage service is more efficient and works with virtually all file types, including PDFs. For example, some functional tools to work on your documents include Google Docs, SharePoint, Microsoft Office 365, etc. These tools also allow the user to set roles such as document owner, collaborator, reader, commentator, etc.

Within this document you will find best practices for comparing documents, merging documents, reviewing a document, managing tracked changes, copying/pasting correctly, how to keep styles from changing in your document, and further information on using collaboration software.

Comparing Two Versions of the Same Document

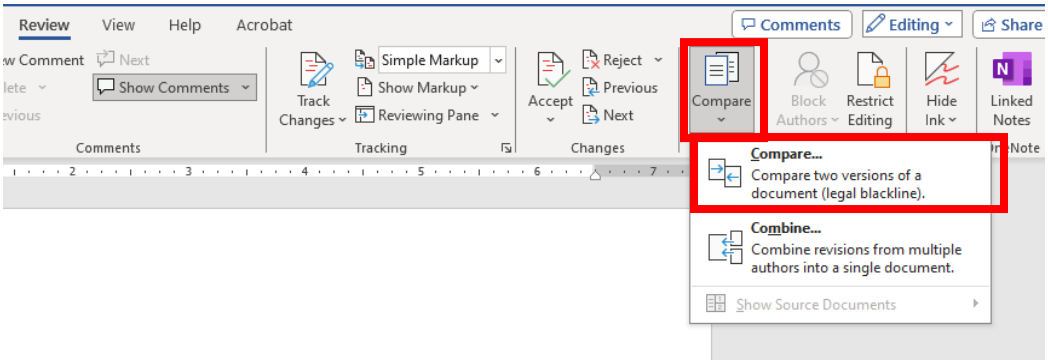
If you want to compare two documents to see what changes were made between the original document and the revised one, the Compare feature in Microsoft Word should be used.

Compare Feature: This feature allows you to compare two versions of a document and see the differences between them in a third separate document. The Compare feature lets you take two documents, an original and an edited document to create a redline version. This feature is useful when you want to see how a document has changed over time, especially if tracked changes was not used to make the updates within the edited document.

Select the 'Compare' option (Review Tab)

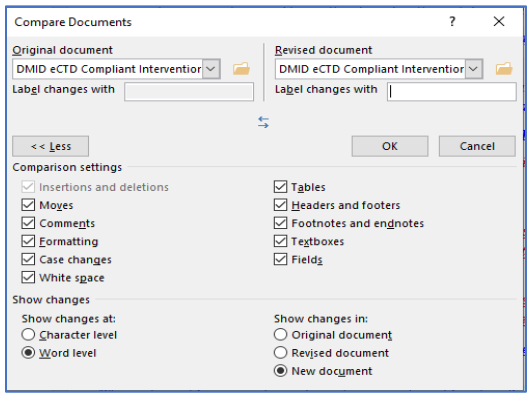
1. Under the Review Tab, in the Compare drop-down, choose the Compare Option. See **Figure 1**.

Figure 1- Review Tab, Compare Drop-Down, Compare Option



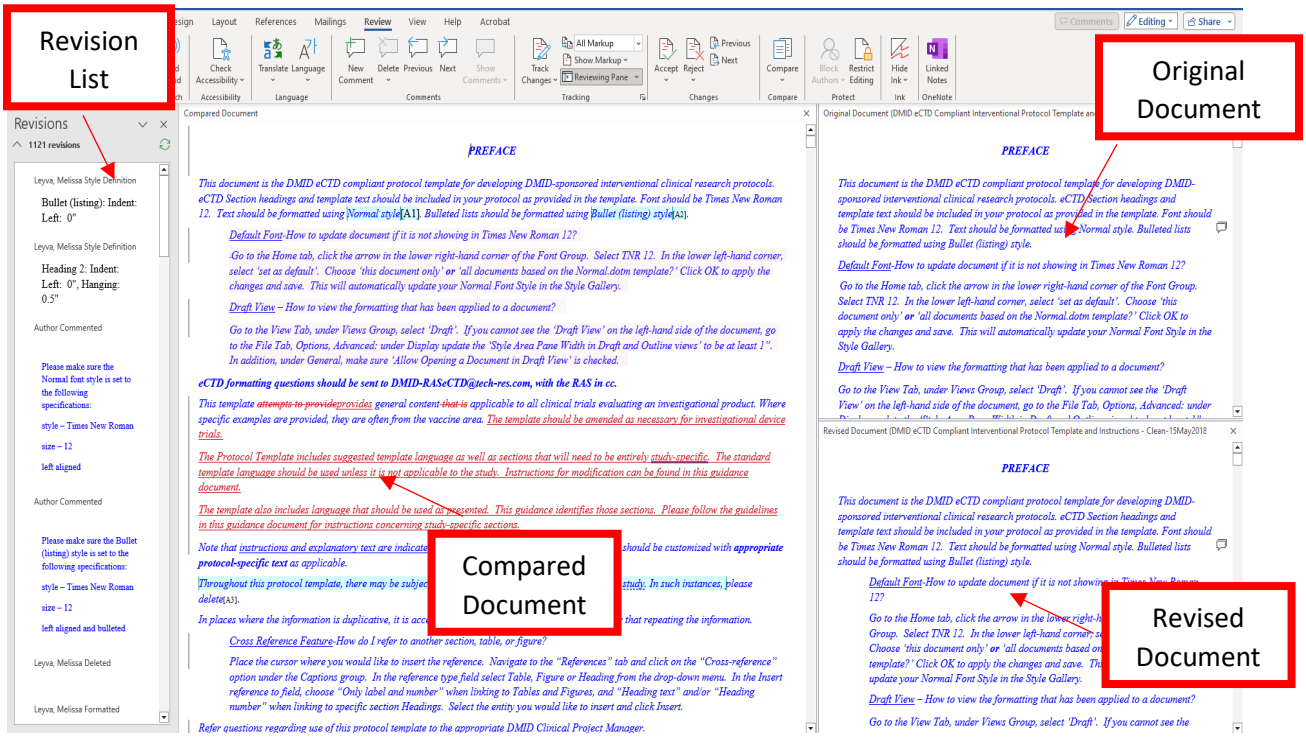
2. Select the documents you want to compare.
   a. In the **Compare Documents dialog box**, select the 'Original document' (appears as a drop-down on the left side of dialog box) by clicking on the drop-down or the folder icon to browse and select the original document.
   b. Select the 'Revised document' you want to combine with the original document (appears on the right side of the dialog box) by either clicking on the drop-down or clicking the folder icon to browse and select the edited/revised copy of the document with changes. See **Figure 2**.

Figure 2- Compare Documents Dialog Box



3. Word will automatically open a new document as seen below. There are three different sections that are displayed. See **Figure 3**.
    a. A scrollable **list of revisions** (left-hand side).
        i. If you double-click on any of the headings, it will move the cursor to that exact position in the document.
    b. The **compared document** showing all the changes (center). Changes will appear as colored markups.
    c. The **original** (top, right-hand side) and **revised** documents (lower, right-hand side).

Figure 3- New Document with Different Sections Displayed for Compare Feature



Merging Two Versions of the Same Document

After you have sent a document out for review, you may get several copies back with suggestions and revisions and will need to combine all of the edits and feedback into one document. This can be accomplished by using the Combine feature in Microsoft Word.

Combine Feature: This feature is used to merge two similar documents that contain tracked changes, usually two versions edited by different people starting from the same original.

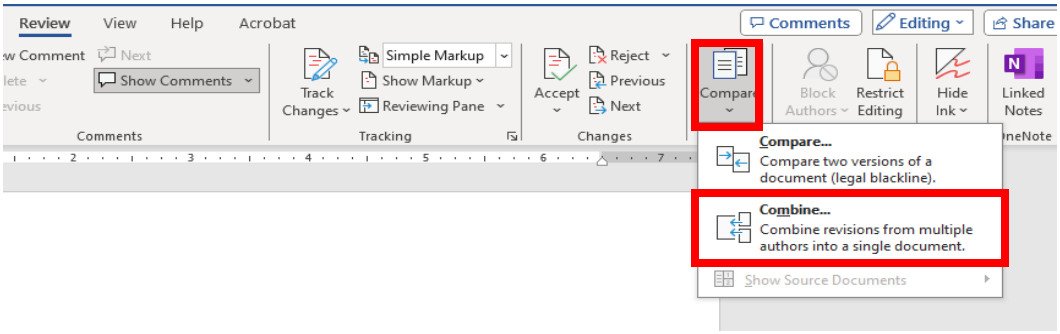
Reminders: The key is to work with **two documents** at a time, reviewing all the changes and then bringing in the changes from the next document. It is best to start with the most current version of the eCTD compliant document, which will be the original document to which the edits from the revised document will be brought in via the Combine feature. This ensures proper formatting from the get-go and version control.

Merging Comments and Changes from Multiple Documents

Select the 'Combine' option (Review Tab)

1. Under the Review Tab, in the Compare drop-down, choose the Combine Option. See **Figure 4**.

Figure 4-Review Tab, Compare Drop-Down, Combine Option



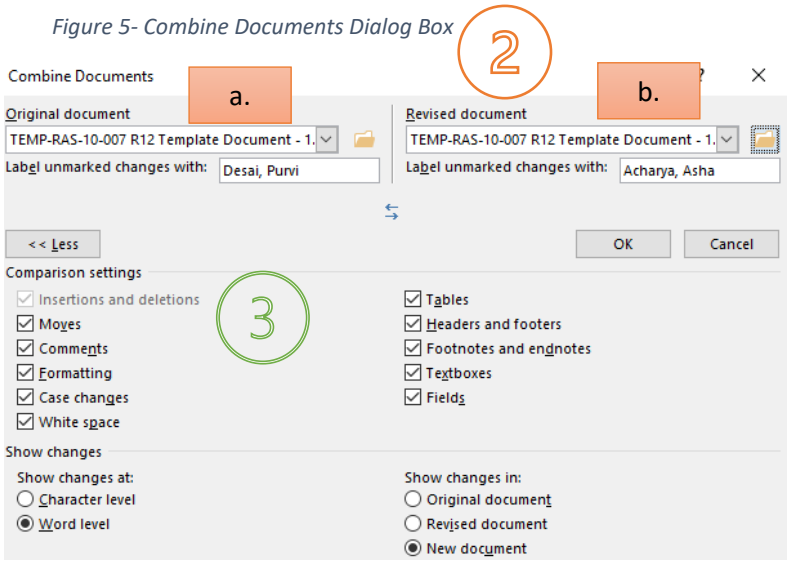
2. Select the documents you want to combine.
    a. In the **Combine Documents dialog box**, select the 'Original document' (appears as a drop-down on the left side of dialog box) by clicking on the drop-down or the folder icon to browse and select the original document.

    Note: **It is best to have the latest version of the eCTD compliant document with the desired formatting selected as the 'Original document'**.

    b. Select the 'Revised document' you want to combine with the original document (appears on the right side of the dialog box) by either clicking on the drop-down or clicking the folder icon to browse and select the edited/revised copy of the document with changes. See **Figure 5**.
3. Merge Comments, Formatting and More
    a. One option you can select when merging documents is the 'more' button. This allows you to merge and retain comments, formatting, headers, footers and more.
    b. This feature displays **Advance Formatting** options. Choose the options you want to use. Once you have selected your preferences click **OK**.
        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.

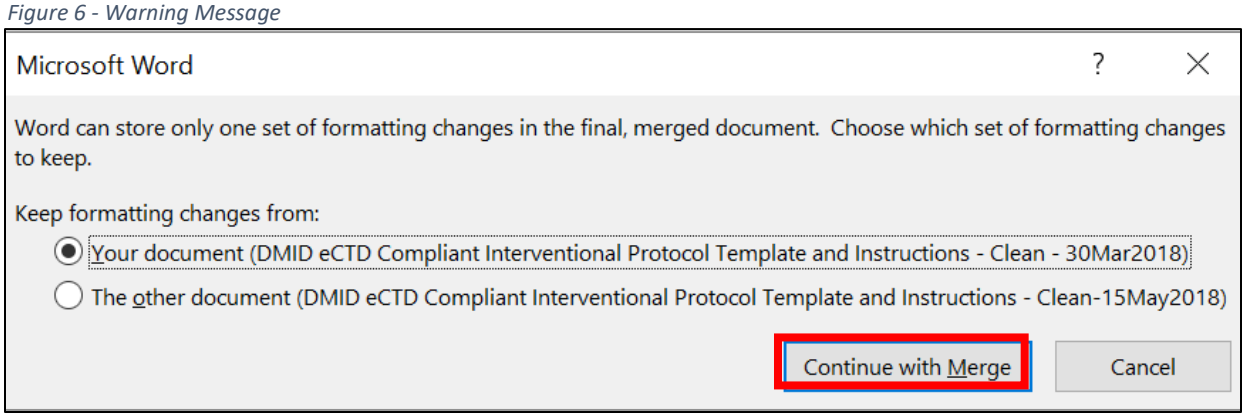
Figure 5- Combine Documents Dialog Box



4. **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. See **Figure 6**.

   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].

Figure 6 - Warning Message

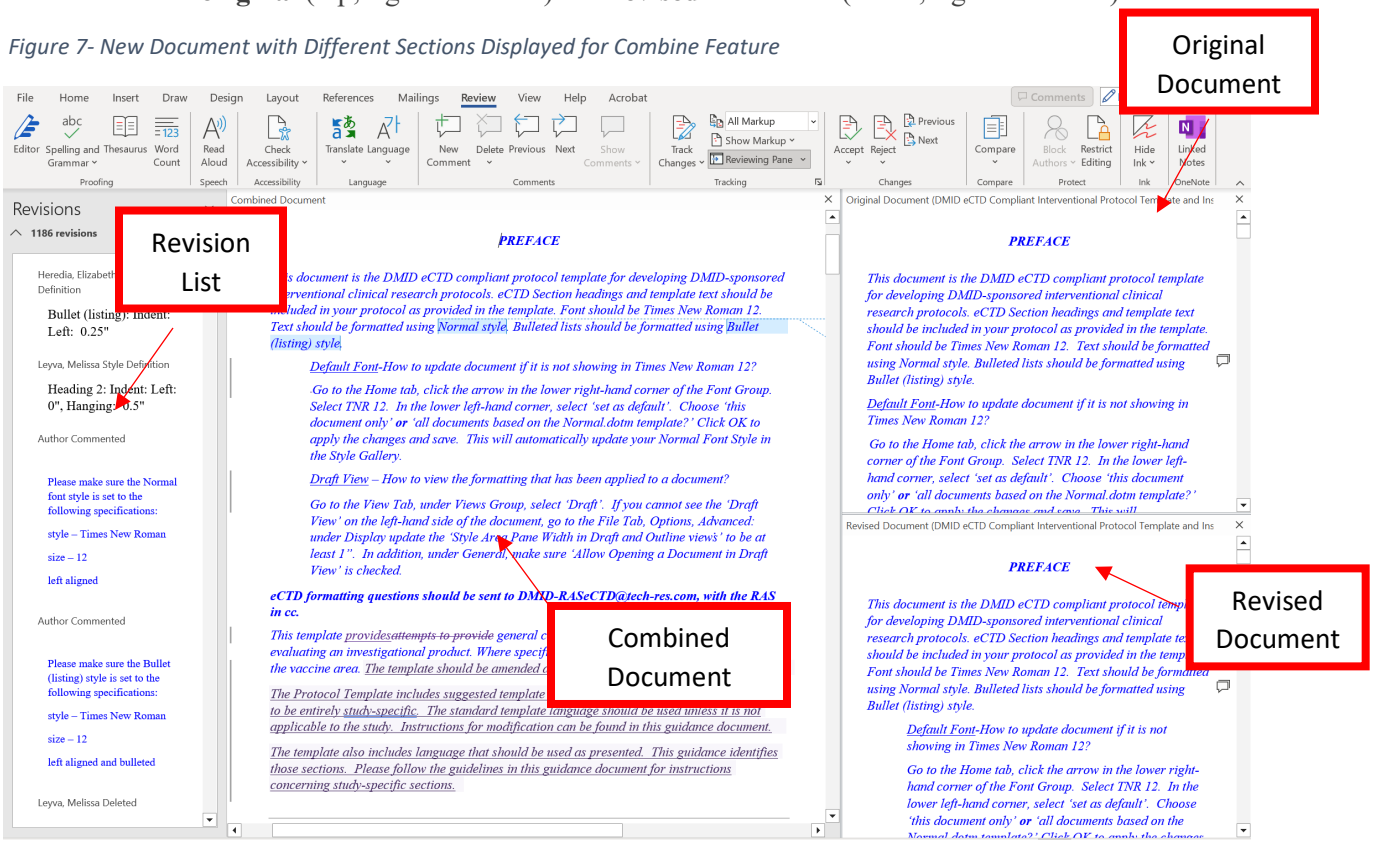


5. A new document will open that combines the original document and the revised one that was merged in. There are three different sections that are displayed. See **Figure 7**.
   - A scrollable **list of revisions** (left-hand side).

- If you double-click on any of the headings, it will move the cursor to that exact position in the document.

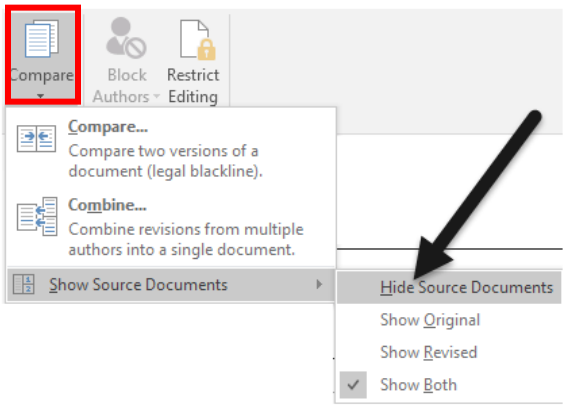
- The **combined document** showing all the changes (center). Changes will appear as colored markups.
- The **original** (top, right-hand side) and **revised** documents (lower, right-hand side).

Figure 7- New Document with Different Sections Displayed for Combine Feature



6. 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 drop-down, Show Source Documents Option. See **Figure 8**.

Figure 8 - Show Source Documents Option



7. ***Reminder***: Before merging more copies, it is good practice to review the initial combined document.
8. Save this document that contains the combined changes of the first two copies.
9. 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.

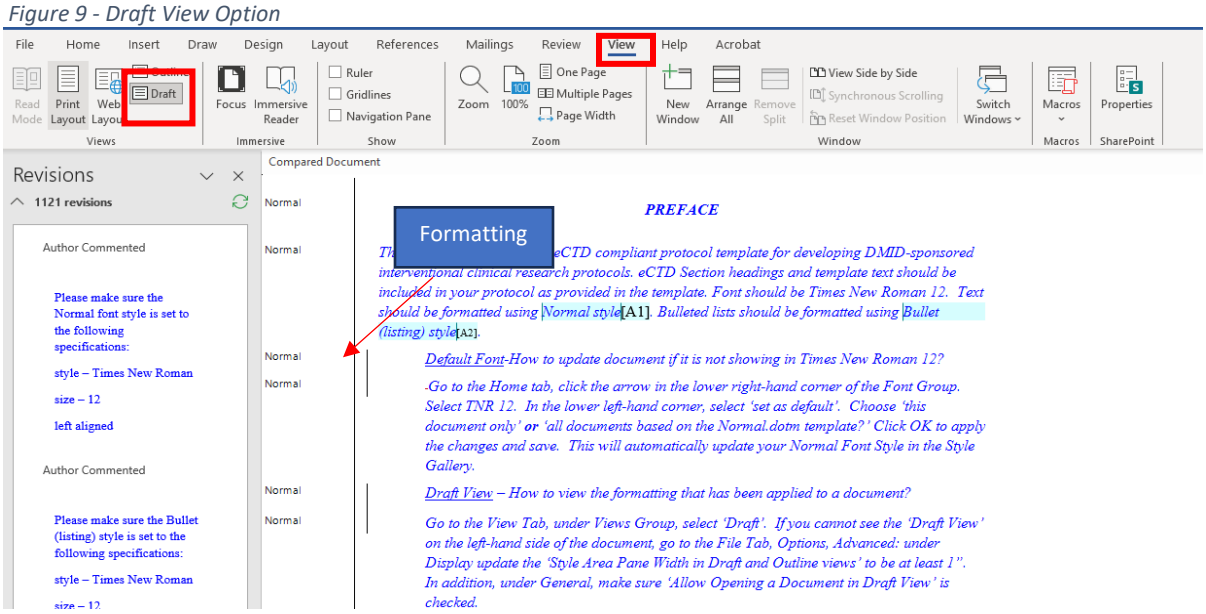
Review the Combined Document

Once the documents have been combined, the next steps are to review the document as noted below.

1. 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).

2. Do a quick check to ensure that no major formatting issues were introduced by the reviewer in the revised document, 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. See **Figure 9**.

Figure 9 - Draft View Option



3. If there are formatting issues, you will need to fix them before moving forward (see *Preparation of eCTD Compliant Documents: Areas to Focus On* for further details on the DMID CROMS Protocol Development website). See **Table 1**.

Table 1 - Formatting Options

Microsoft Word Font Styles	If sections and/or headings have been added, ensure that the appropriate front style is applied to all section headings as this will allow them to appear in the Table of Contents (TOC). For example, Heading 1, Heading 2, Heading 3, Normal, etc.
Table and Figure Captioning	Inserting captions for all tables and figures allows them to pull into a List of Tables (LOT) or List of Figures (LOF). Ensure that the orientation of the figures and tables are correct, and tables are not split across the pages, especially with the addition of columns or rows.
TOC	If a document is more than 5 pages, insert a TOC. Ensure that the additional sections/headings, added or deleted in the edited document, are also pulled into the TOC.
TOC, LOT, and LOF	Ensure updating these with each merge. It is best to select the option to 'Update entire table' when prompted. This will update the page numbers and the text (extremely important when sections/headings/tables/figures have been added or deleted).

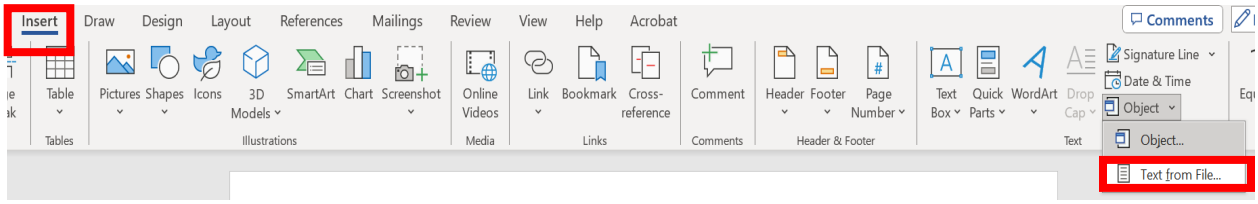
Merging the Text of Multiple Different Documents

This feature is used when you want to merge the text from completely different documents.

Go to **Select the 'Text from File' option (Insert Tab)**

1. Under the Insert Tab, in the Text Group, choose the Object drop-down. Select 'Text from File'. See **Figure 10**.

Figure 10- Text from File Option



2. Select the files to merge into the current document. This is done by browsing to the location of the file and selecting Insert. **Note**: **Word will keep the original document's formatting**. See **Figure 11**.

Figure 11- Document with Inserted Text

Place the cursor where you would like to insert the reference. Navigate to the "References" tab and click on the "Cross-reference" option under the Captions group. In the reference type field select Table, Figure or Heading from the drop-down menu. In the Insert reference to field, choose "Only label and number" when linking to Tables and Figures, and "Heading text" and/or "Heading number" when linking to specific section Headings. Select the entity you would like to insert and click Insert.

Refer questions regarding use of this protocol template to the appropriate DMID Clinical Project Manager.

Test Document for Demonstration Purposes

1 SAMPLE HEADING 1

Text for the first paragraph under Sample Heading 1.

3. Repeat the process for each document you want to add.
4. Save the document once you are finished.

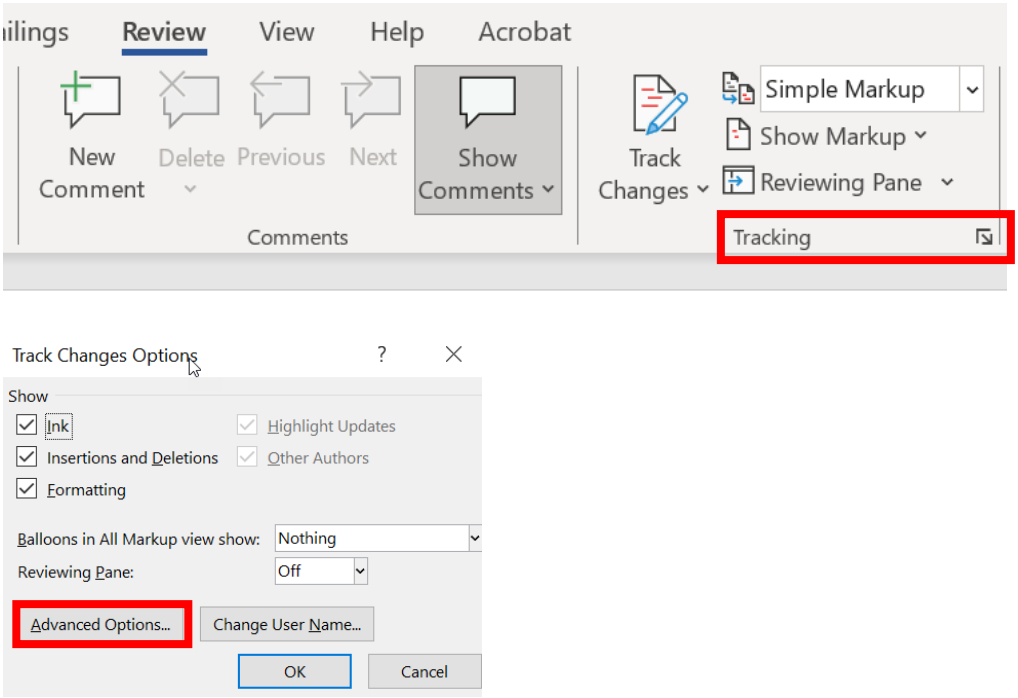
How to Review a Document (Tracked Changes and Comments)

Advanced Tracking Options

To change the Tracked Changes Options:

1. Under the Review Tab, in the **Tracking** Dialog Launcher, choose the arrow icon. Select Advanced Options. See **Figure 12.**

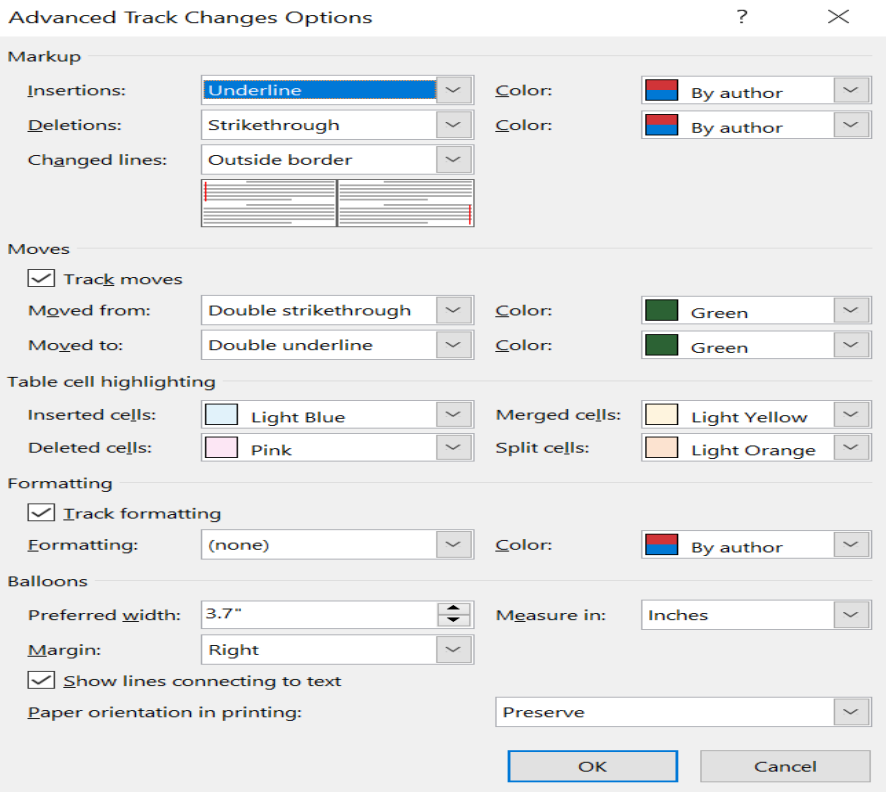
Figure 12- Tracking Dialog Launcher Option



2. The **Advanced Track Changes Options dialog box** appears. Choose the options you want to use. See **Figure 13**.

   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 how text has moved within the document, choose how changes are handled within a table (highlight inserted cells or deleted ones) and whether formatting is tracked.

Figure 13 - Advanced Track Changes Option



Break Down of Advanced Track Changes Options

Markup

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

- ***Insertions and Deletions*** can be viewed using a different color, the underline feature is the default for Insertions and the strikethrough feature is the default for Deletions. **Note**: By author option gives each user a different color.
- ***Changed Lines*** can be viewed on the left margin, right margin or outside margin of the document.

Moves

Tracks Text movements within the document.

- ***Track Moves*** distinguishes when a section of text has been cut and pasted from one location to another in your document. The default for this is on.
    - It can be viewed using a specific color as well as change options (default is green with double strike-through for 'moved from' and double underline for 'moved to').
- ***Table Cell Highlighting*** allows you to view various formatting options in the tables in various colors.
    - ***Inserted Cells*** sets color of table cells when you insert new ones. The default color is light blue.
    - ***Deleted Cells*** sets color of table cells when you delete them. The default color is pink.

- ***Merged Cells*** sets color of table cells when you merge multiple cells. The default color is light yellow.
- ***Split Cells*** sets the color of table cells when you split a cell. The default is light orange.

Formatting

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

- ***Track Formatting*** turns on/off track changes on for formatting, such as making something bold or changing font size. Choices are changing the color only or the color and its formatting while in track changes.

Balloons

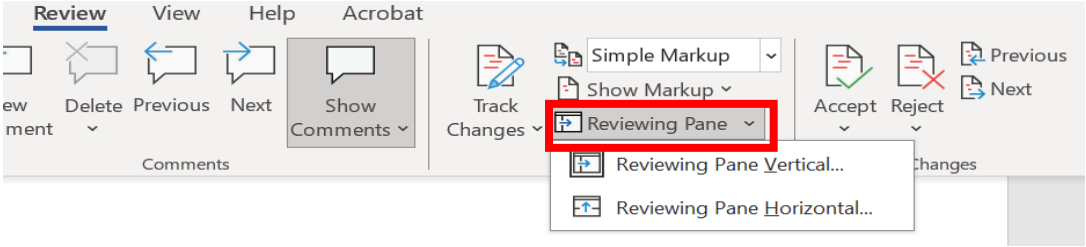
Some editing changes are noted using balloons. The settings in this section allow you to specify how those balloons appear in the document.

- ***Preferred Width*** sets the width of the formatting change note.
- ***Margin*** sets which site of the document the formatting change note appears. By default, this is on the right side of the document.
- ***Measure In*** sets the units to use for the preferred width of measurement.
- ***Show Lines Connecting Text*** sets whether comments are connected to the text that was commented on in a sentence. The default is On.
- ***Paper Orientation in Printing*** sets the printing orientation.

Several Options for Managing Tracked Changes

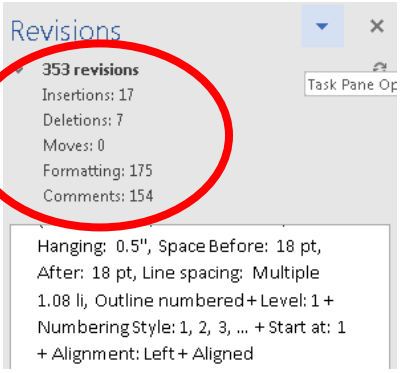
Make sure the Reviewing Pane is turned on. On the Review Tab, in the Tracking Group, select **Reviewing Pane** to view the revisions list. See **Figure 14**.

Figure 14- Reviewing Pane Option



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. See **Figure 15**.

Figure 15 - Revision List with Revision Counts

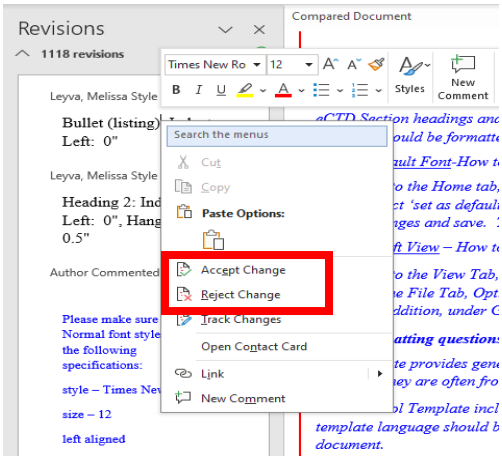


Accepting and/or Rejecting Edits

Now all the differences are displayed in the combined file, and you need to determine which changes to keep and which you want to discard.

The most efficient way to do this is to use the revisions list on the left-hand side of the page. You can either right-click on each change and select **accept** or **reject** or you can place your cursor on the text under each listed revision and change it accordingly. Word will automatically update the text in the main document as you go along. Once you have worked through all of the changes you can save the final document. See **Figure 16**.

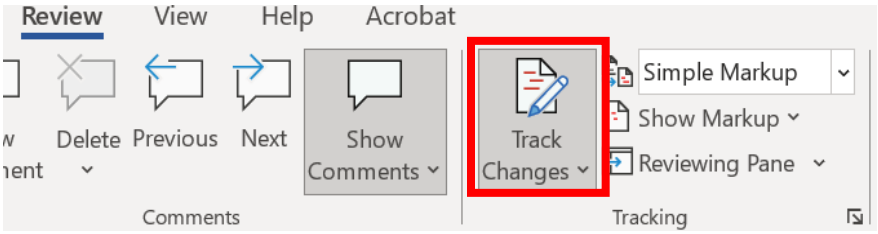
Figure 16 - Accept or Reject Changes Options within Revision List



See or Hide Track Changes

Click the Review Tab and toggle the Track Changes option on or off. See **Figure 17.**

Figure 17- Tracked Changes Drop-Down

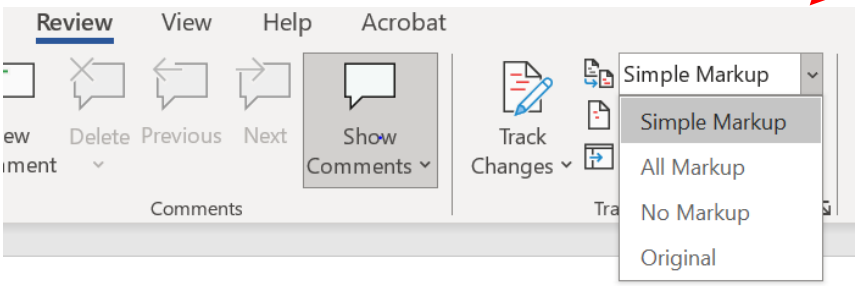


Choose Type of Changes Shown

Click the Review Tab and choose Display for Review drop-down. This allows you to change the way redlines are displayed in your current view. See **Figure 18**.

- *Simple Markup*: This option hides markups, shows comments and indicates changes with a red vertical line in the margin.
- *All Markup*: This option shows all tracked changes and comments in the document.
- *No Markup*: This option shows you the document with all the tracked changes accepted.
- *Original*: This option shows you the document in its original form, without any redlines or comments.

Figure 18- Display for Review Drop-Down

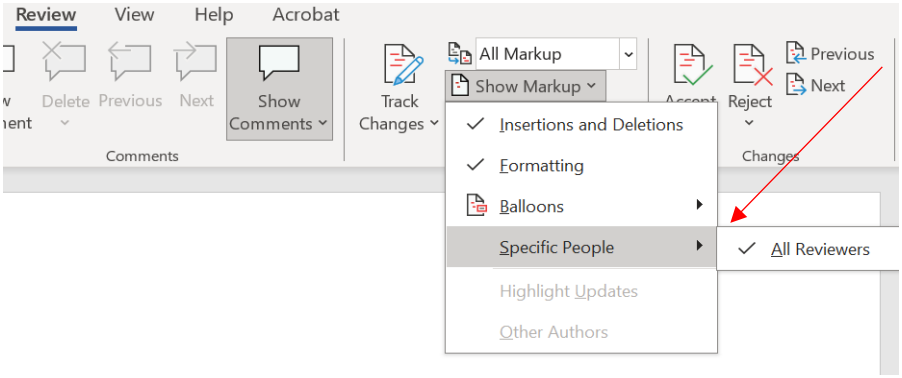


Review Changes by Type of Edit or by a Specific Reviewer

Show Markup

Allows you to control what markups you see. You can turn on or off markups for insertions and deletions, formatting, balloons, and even specific reviewers (from the list displayed). See **Figure 19.**

Figure 19- Show Markup Option on Review Tab



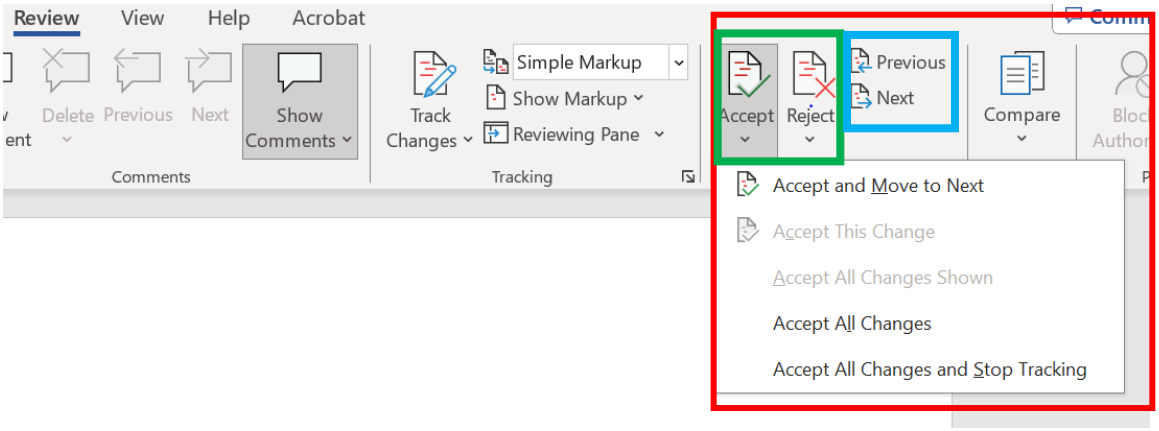
Move to the Previous/Next Change/Comment:

To review each tracked change and comment in sequence, click on any changed text and use the previous and next options in the Review Tab, in the Changes Group.

Accept or Reject Changes: Click on any changed text and select the Accept or Reject Button. See **Figure 20**.

The Reviewing Pane will show you how many tracked changes remain in the document (see above Figure 15).

Figure 20- Accept or Reject Changes and Previous and Next Options in Review Tab



Break Down of Options:

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

If you want to pull text with tracked changes from one document into another, the following steps should be followed. To ensure the correct use of this feature, the tracked changes should be turned off in both the documents you are working with. If tracked changes are not off in the source document prior to copying, Word assumes you want to copy the text as if the changes were accepted.

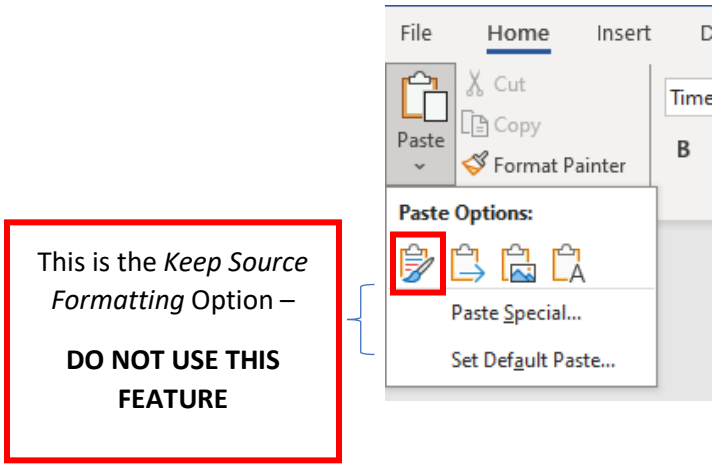
Pasting Text with Tracked Changes

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 'Paste Options' in the **Home Tab** (see **Figure 21**). 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**.

- **Picture** : This option converts copied text into a picture. You would use this option in limited circumstances, and you cannot modify it.
- **Kept Text Only** : This option removes 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**: This option, Word changes the copied text's formatting to match the text in your target document but keeps certain elements such as bulleted lists and links. This option allows you to paste text while adopting the formatting of the surrounding text in the target document, e.g., if you cut and paste a sentence from another document that had a different font type or size.

Figure 21 - Paste Options on Home Tab

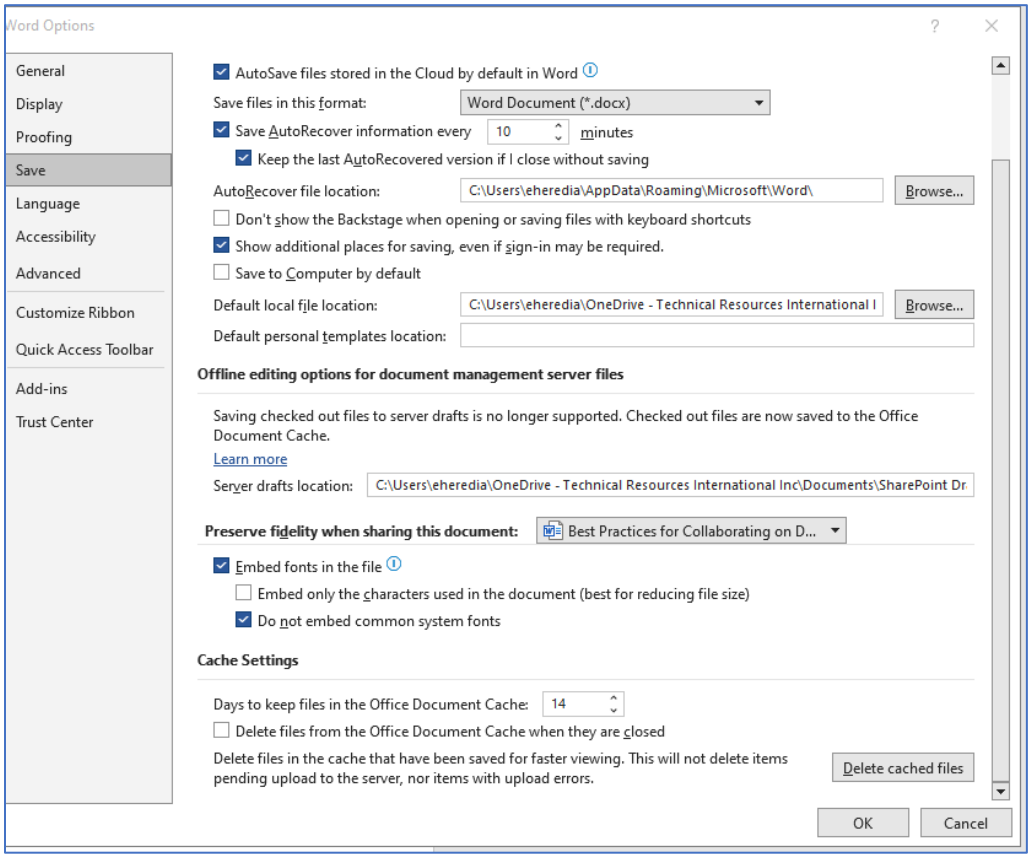


Preventing Styles from Changing

If a document uses a font that is on your system, and then that document is opened on a system that doesn't have the same font, Microsoft Word will substitute a different font for the missing one. This can affect the appearance of the document, even when you subsequently open it back on your original system. To avoid this, make sure that you have Word configured so it will embed TrueType fonts with the document. See **Figure 22.**

1. Click the File Tab and then click Options.
2. Click on Save at the left side of the dialog box.
3. Near the bottom, click the Embed Fonts in the file option.
4. Select Do not Embed Common System Fonts.
5. Click Ok.

Figure 22 - Word Options to Embed True Type Fonts



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.

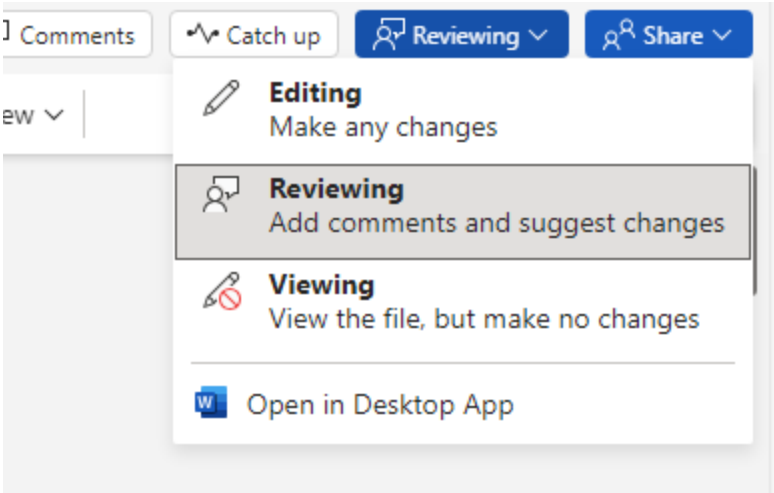
- There is only one version of the document that everyone can work on.
- Every reviewer can see what work has been done, so you can decrease duplicate effort.
- It removes the need to merge documents or copy, paste, and reformat from multiple documents.
- The owner of the document can easily take the 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.

With an account on SharePoint or Microsoft OneDrive, you can store files, such as your Word documents, to one of those places, then use the Share command to let others read or edit your copy of the file.

When someone shares a Word document with you, the email you receive includes a link that opens the document in your web browser: in Word for the web.

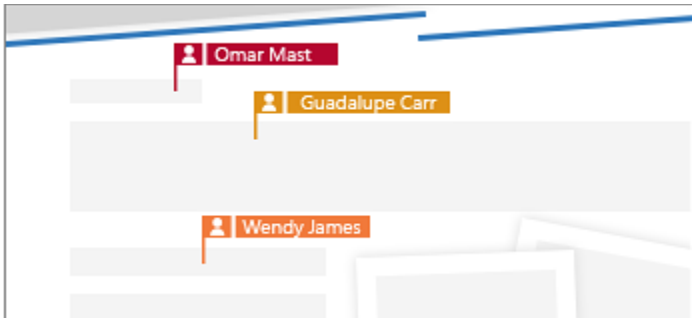
1. Select Reviewing – following options will show up (see **Figure 23**):
    a. Editing
    b. Reviewing
    c. Viewing
    d. Open in Desktop App

Figure 23 - Options for Reviewing



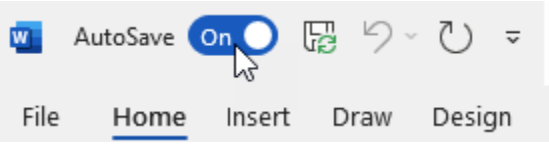
2. If anyone else is working on the document, you'll see their presence and the changes they're making. We call this coauthoring, or real-time collaboration (see **Figure 24**).

Figure 24 - All Reviewers in Real-time Collaboration



3. Make sure that the Tracked Changes is enabled before making any changes.
4. To work in the Desktop App click on the 'Open in Desktop App' under Reviewing.
5. Once the document opens in the Word App, ensure that the AutoSave (top left corner) is turned 'On' (see **Figure 25**)

Figure 25 - AutoSave Option



6. Once you are done working on the document, you can simply close the document. With the AutoSave mode on, all your changes would have been saved.

Note that whenever a link is received via email, there is an option to download a local copy of the document, but it is highly recommended to edit online so that everyone gets access to the most current version of the document.