

## Tracking Changes

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The Track Changes feature is used to show where revisions, such as deletions and additions, are made in a document. To facilitate online review, Microsoft Office provides an easy way to make and view tracked changes and comments in a document. In order to preserve the layout of the document, the programs show some markup elements in the text of the document while others are displayed in balloons that appear in the margin in Word, by a red mark that appears in the corner of a cell in Excel, and by a box with the reviewer's initials in PowerPoint. As part of the Track Changes feature, documents may be sent to others in the organization for review.

To use Track Changes:

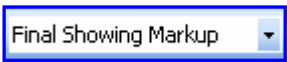





- ❖ Open the document that is to be revised.
- ❖ On the **Tools** menu, click **Track Changes**.
  - When the **Track Changes** feature is enabled, **TRK** appears on the status bar at the bottom of the document (see illustration). TRK
  - When **Track Changes** is turned off, **TRK** is dimmed.
- ❖ Make the desired changes in the document by inserting, deleting, or moving text or graphics.






### Notes

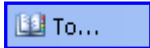
- It is possible to change the color and other formatting that the programs use to mark changed text and graphics.
- If change tracking is used and then the document is saved as a Web page, tracked changes will appear on the Web page.

### Sending the Document for Review

- ❖ Open the document that is to be reviewed.
- ❖ Turn on **Track Changes** by using one of the following procedures:
  - Click **Tools, Track Changes** on the **Menu Bar**.
  - Double-click the **TRK** option on the **Status Bar** (at the bottom of the Program Window).
    - It is shaded **Gray** until after it is selected. TRK
    - It will then turn to **Black**.
- ❖ The **Reviewing Toolbar** should be displayed below the **Formatting** toolbar or somewhere else in the toolbar area. The buttons on the toolbar from left to right are:

Toolbar Button	Description
<b style="color: red;">Display for Review</b> 	Four options appear here. Choose one of the options or leave the default which is Final Showing Markup. This option shows the changes that have been made.
<b style="color: red;">Show</b> 	Lets the user choose what types of revisions are to be displayed.
<b style="color: red;">Previous</b> 	Displays the previous change or comment.
<b style="color: red;">Next</b> 	Displays the next change or comment.
<b style="color: red;">Accept Change</b> 	Accepts the current change or comment. Click the drop down arrow to see the other available options.
<b style="color: red;">Reject Change/Delete Comment</b> 	Rejects the current change or comment. Click the drop down arrow to see the other available options.

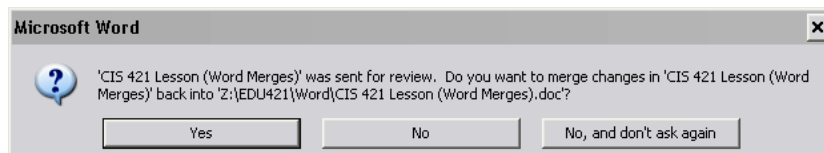
Toolbar Button	Description
<b>New Comment</b>	 Inserts a new comment into the document. Click the drop down arrow to edit or delete a comment.
<b>Highlight</b>	
<b>Track Changes</b>	 This is a toggle button that turns the Track Changes feature off or on. It might be a good idea to turn this feature off before the reviewing of the document is started so the changes made from this point on are not tracked in the document.
<b>End Review</b>	 This button only appears when a document has been sent to the recipient using email. This option will stop the reviewing process. A dialog box will appear asking if the review process should really be stopped.
<b>Reviewing Pane</b>	 Opens a pane at the bottom of the window and displays changes/comments there.




- ❖ Click **File** on the **Menu Bar**.
- ❖ Point to **Send to** from the list of options.
- ❖ Choose **Mail Recipient (for Review)** from the next list that appears.
- ❖ A window will open that will look similar to email messages in Outlook.
- ❖ Click the **Address Book** icon next to the word **To** (see the illustration at the right) to select the recipients from the **Address Book** or key in the addresses of the people in the **To** box. 
- ❖ If the **Address Book** is chosen, a list of contacts will appear just like in any other email Address Book.
- ❖ Select the recipients for the document.
- ❖ The following areas will have text or documents already displayed in them:
  - **Subject** – A message will appear asking the recipient to review the document.
  - **Attach** – The document will be already attached to the email message.
  - **Body of email** – Another message will appear asking the recipient to review the attached document.
- ❖ Make any changes to the subject line or the body of the email, if desired.
- ❖ Click the **Send** button to send the email message and the document.

### Accepting/Rejecting Changes

When the documents are returned, the choice may be made to merge them into the original document. To do this:

- ❖ Double-click the attachment while in **Outlook**.
- ❖ The **Opening Mail Attachment** dialog box will display.
- ❖ Click the **Open** radio button to choose that option.
- ❖ The message box at the right will display.
- ❖ Choose **Yes** to merge the attachment with the original document.

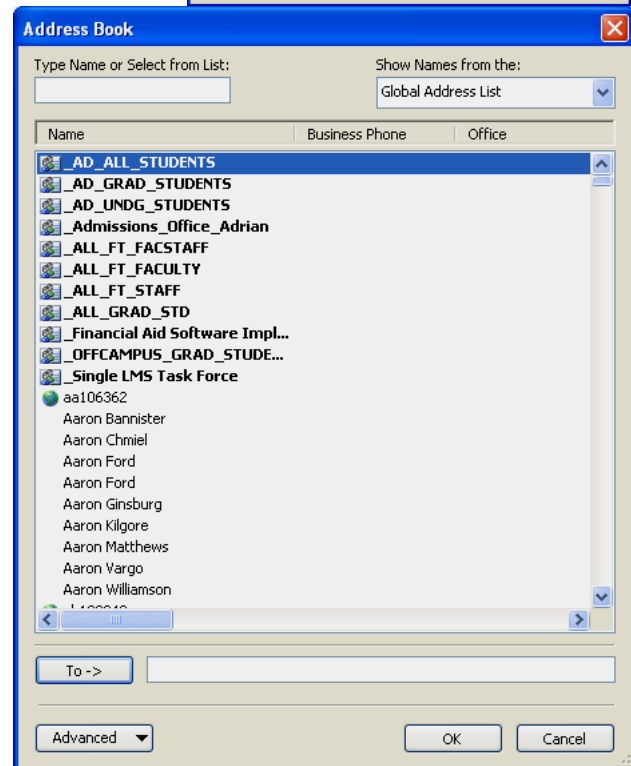
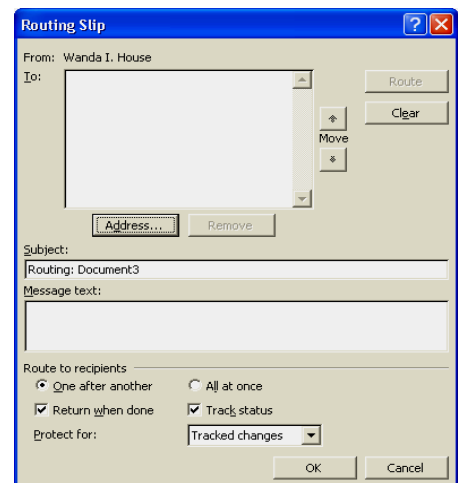


- ❖ The two documents will be merged together with the changes from the **Reviewer** highlighted.
  - Click the **Next** button (see top illustration) on the **Reviewing** toolbar to move to the first change. 
  - Click the **Accept Change** button (see middle illustration) to accept the change and remove the original word or phrase. 
  - Click the **Reject Change/Delete Comment** button (see bottom illustration) to reject the change and leave the original word or phrase. 
  - Continue this process until all of the changes have been accepted or rejected.
- ❖ Some of the changes will appear in different colors. Some will appear in **bubbles** at the right side of the page with a line pointing to the change.
- ❖ A black vertical line will appear in the left margin of the document indicating that a change has been made in that line.

### Routing a Document

Instead of sending a copy of the document to each individual person, it is possible to send the document to each individual in turn by putting the recipient on a routing list. To do this:

- ❖ Open the document that is to be routed.
- ❖ Turn on **Track Changes** so the revisions made to the document can be quickly reviewed when it is returned.
- ❖ Click **File** on the **Menu Bar**.
- ❖ Click **Send To** from the list of options.
- ❖ Click **Routing Recipient**.
- ❖ The **Choose Profile** dialog box may appear.
- ❖ Another message may appear stating that the program is trying to access the Address Book.
- ❖ Click **Yes** to accept this. **DO NOT** click anywhere in the document at this point or the computer may lock up.
- ❖ The **Routing Slip** dialog box will appear.
- ❖ Click the **Address** button in the middle of the dialog box.
- ❖ The **Address Book** dialog box will display.
- ❖ Click the **Show Names from the** drop-down arrow.
- ❖ Choose the list where the names are to be chosen from.
  - The **Global Address List** contains the names of all students, faculty, and staff at Siena.
  - The **Contact** list contains the names of the people in a personal address book.



- ❖ The first person on the list will receive the document.
- ❖ In the **Type name or select from list** box:
  - Enter a name and then click **To**.
  - Repeat this step for each additional recipient, and then click **OK**.
- ❖ Select the desired routing options from the following:
  - **One after another** – Sends the document to one recipient at a time.
  - **All at once** – Sends the document to all the recipients at the same time.
  - **Return after done** – After the last recipient reviews the document, it will be sent back to the person who sent it.
  - **Track Status** – Shows who has the document at a specific time.
- ❖ Input a **Subject** for the message, if desired. The default is **Routing Document**.
- ❖ If desired, input a message for the recipients in the **Message** box.
- ❖ To change the order of routing, click the **Move Up** or **Move Down** buttons.
- ❖ After all the selections have been made, do one of the following:
  - To route the file, click **Route**.
  - To close the dialog box without routing the file, click **Add Slip**.
  - To route the file at a later time, do the following:
    - Choose **File** on the **Menu Bar**.
    - Select **Send To** from the list of options.
    - Choose **Next Routing Recipient**.
- ❖ Several messages may be received when routing a file. Read them and make the appropriate decision about what to do.
- ❖ Instructions on how to route the file are included in the e-mail message that is automatically created when the file is first routed.

### **Change the Routing Slip of a Routed File**

- ❖ Open the file that has the **Routing Slip** that is to be edited.
- ❖ On the **File** menu, point to **Send To**.
- ❖ Click **Other Routing Recipient**.
- ❖ When the file has been sent for Review, the following can be done:
  - The originator of the file can change the desired options.
  - A recipient can change the order in which other recipients see the file. To do this:
    - Select the recipient whose order of receipt is to be changed.
    - Click the appropriate arrow: **Move Up** or **Move Down**.
- ❖ Do one of the following:
  - To route the file, click **Route**.
  - To close the dialog box without routing the file, click **Add Slip**.