



EDITING IN MS Word (365) 101

Instructor: Rachel E. Newman

LESSON #2

Advanced Track Changes and Auto Proofing

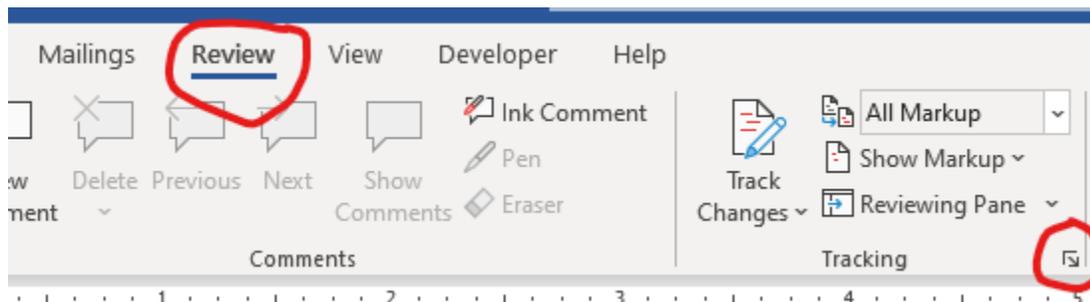
Last week we learned how to turn on Track Changes, add and delete comments, and reject or accept changes. This week we will learn how to change our preferences for Track Changes, and we will explore the options Microsoft Word offers for automatic proofing.

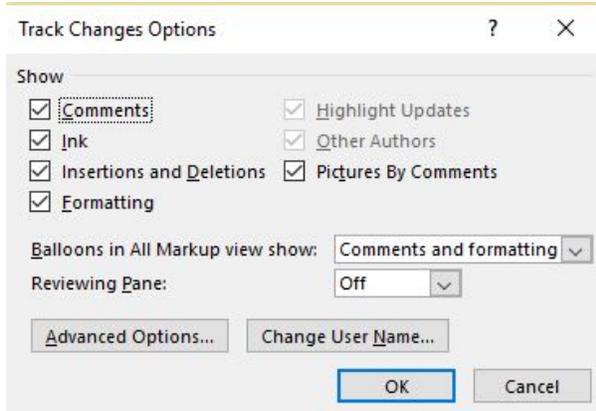
Advanced Track Changes

Microsoft Word offers advanced ways to track the changes you make to a document. To access these options, click on the Review tab.

In the Tracking area, click on the dialog box launcher in the bottom right-hand corner.

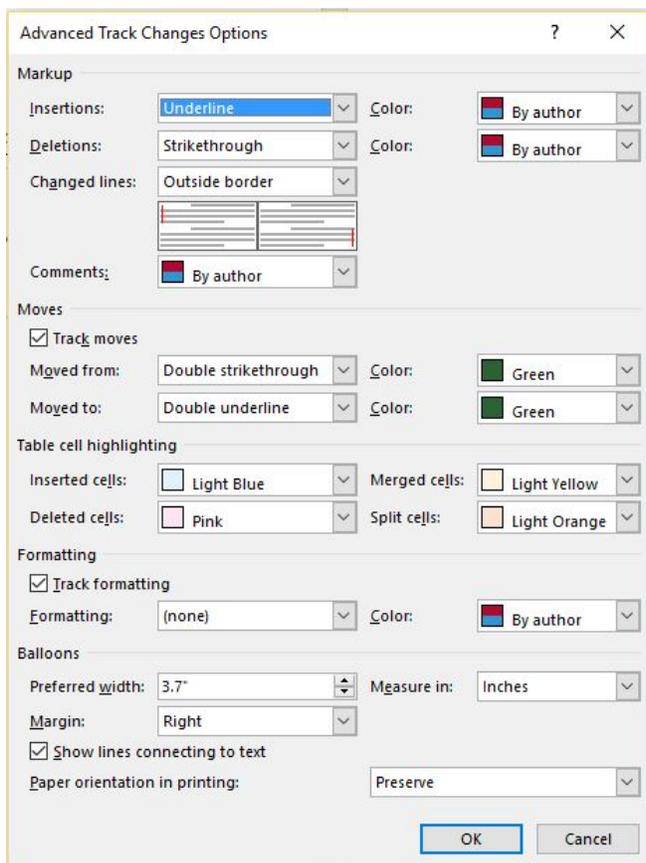
This will open Track Changes Options.





Here you can see that you have the option for Microsoft Word to show your comments, ink, insertions and deletions, and formatting as well as your picture next to comments. You also have the option to change what is shown in the balloons on the side by clicking on the drop-down box for balloons. You can also turn on your reviewing pane if you prefer to track your changes that way. I prefer to see the changes directly on the text, not in a reviewing pane. But you have that option if it works better for you.

You also have access to Advanced Options by clicking on the designated button. When you click on this button, the following dialog box will open.



Here you can change the way Microsoft Word treats text that has been changed. By default, it underlines anything you add and indicates deletions with a strikethrough. If “By author” is selected, it color codes the changes according to the person who made the change. So your changes will be in one color, and your client’s changes will be in another color. You don’t get to choose the colors if you select this option. I like to track my moved text with a double strikethrough/underline and the color green.

The other thing I want to bring your attention to on this window is the Balloons area. You can change the width of the balloons which will allow you to have larger text and make it easier to see. There are other options you can play with, but these are the main ones you will use. I don’t want to overwhelm you with the others. Most of them are self-explanatory.

Remember when I mentioned you can choose to show your picture next to your comments? Well, the way you do this is by setting up a picture with your Microsoft account. You can make changes to your account by clicking on the name in the upper right-hand corner.



When you click on the name, a pop-up menu will appear. If there are more people than just you in your house with a Microsoft account, it may be their name that is showing. You’ll have to change your account before you can change the picture. Regardless of which option you choose, once you select it you will be rerouted to your online Microsoft account where you can upload a picture. Once you’ve uploaded a picture, you can choose to show it in the comments. If your client has Microsoft Word for Microsoft 365, they will be able to see your picture too.

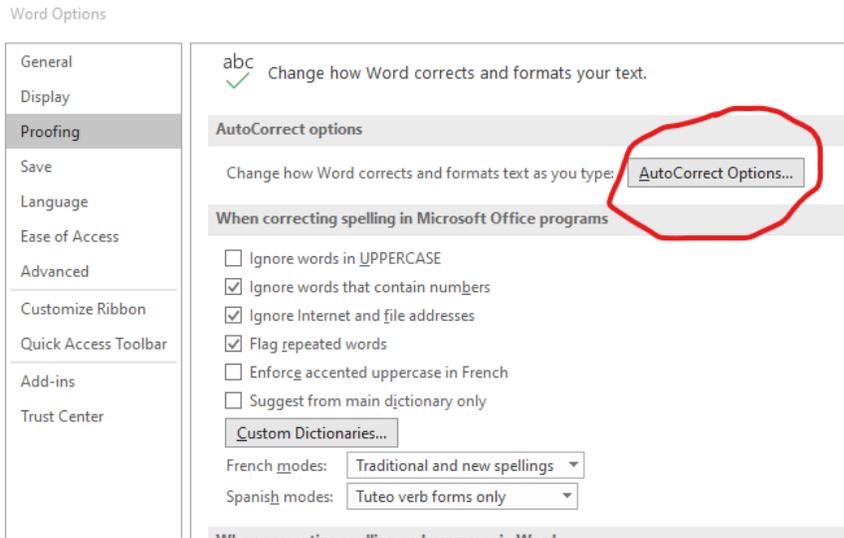


This isn’t a necessary feature, but it does add a personal touch and helps your clients feel more connected to you.

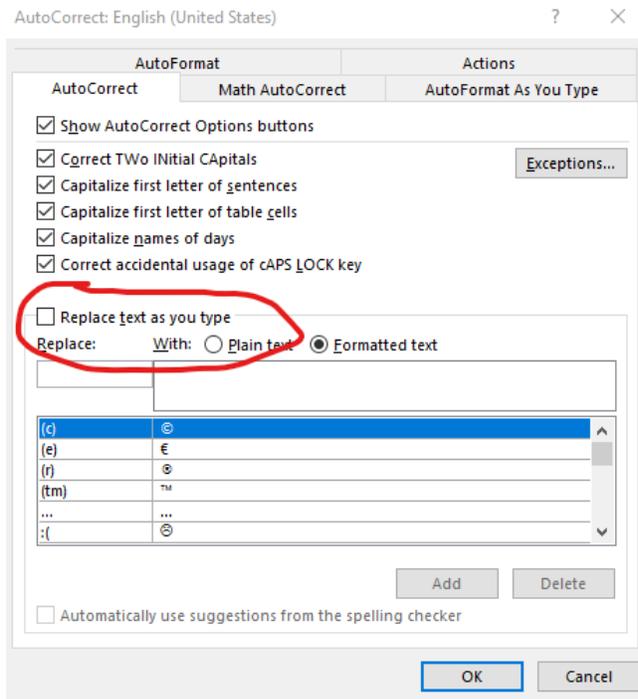
Auto Proofing

One of the nice features in Microsoft Word is that it has a built-in proofing system. It will check spelling, grammar, and word usage. This is nowhere near as accurate or efficient as a real-life proofreader. But it will help you catch things you might otherwise miss as you are proofreading.

Because it is not as accurate as a live person, however, you want to turn off the AutoCorrect feature immediately. If AutoCorrect is on, Microsoft Word will identify issues and correct them without notifying you. To access your AutoCorrect Options, click on the File tab. Along the left-hand side, select the last item, Options. In the Word Options window, select the third option on the left-hand side, Proofing.

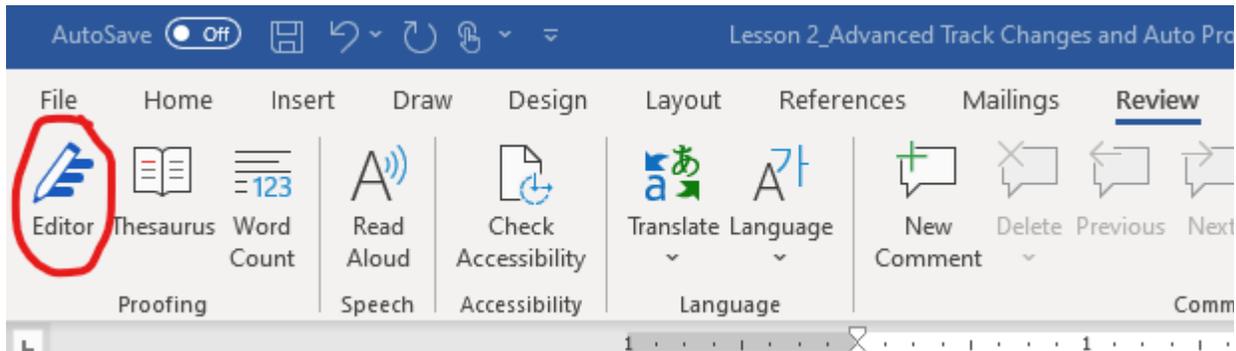


Click on the button AutoCorrect Options. There are many different options you can choose to customize your Microsoft Word experience. But for now, just remove the checkmark from “Replace text as you type.” Click OK. Then click OK again.



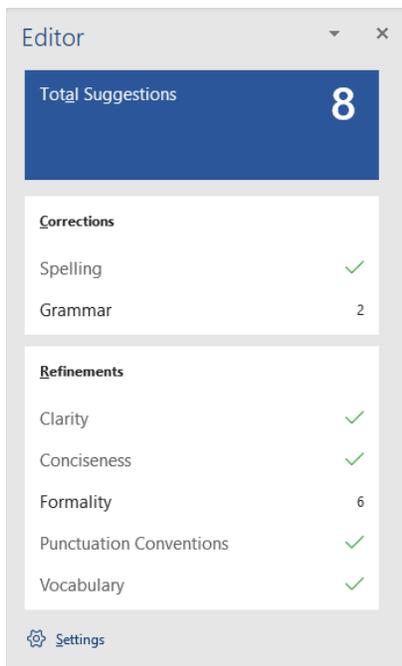
This will prevent Microsoft Word from making automatic corrections. But it will still mark problems it identifies so you can review them for yourself. You can address each of the marked problems consecutively before you return the edited material to your client. There is a long and a short way to do this.

The Long Way: Click on the Review tab. On the far left, select “Editor.” (Note this was formerly called Spelling & Grammar.)



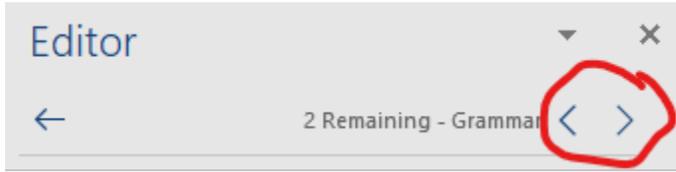
The Short Way: F7

This will bring up spelling, grammar, and writing suggestions on the right side of the screen. If it has any suggested corrections, it will show the number of corrections. If there are no corrections in a category, it will have a green checkmark.

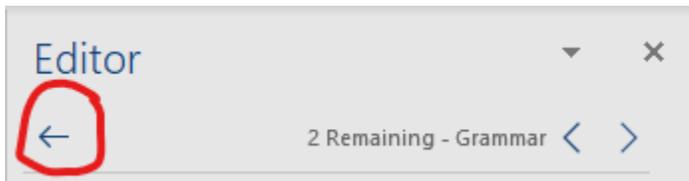


You can click on a category, and it will show you what it thinks is a problem and how it thinks you can fix it. You have different options on how to handle the issue including telling Microsoft Word to ignore the perceived problem. You’ll notice after you click on a category that there are

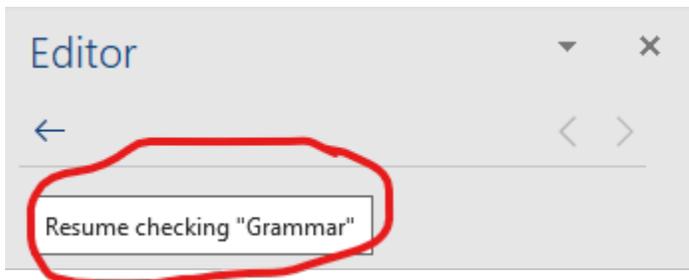
two arrows in the upper right corner of the Editor section. Use these to toggle through the different suggestions within that category.



To return to the list of categories, use the back arrow in the upper left corner.

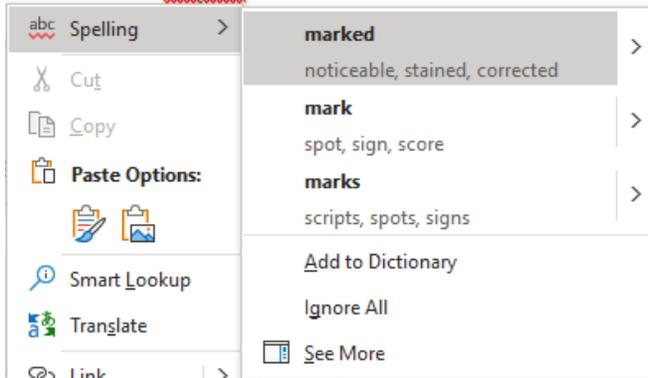


If you click within the text to make changes, the editor window will become shaded to indicate it is inactive. To run the Editor again, click on the button "Resume checking 'Grammar'."



As you work through the manuscript, Microsoft Word will underline words that have been misspelled with a red squiggly line. It will identify grammar issues with a blue double underline. And it will mark suggested refinements with a purple dotted underline. I like to address these flagged items as I encounter them throughout the manuscript. You can do that by right clicking over the word that has been marked. This will bring up a drop-down menu with options on how to treat the text.

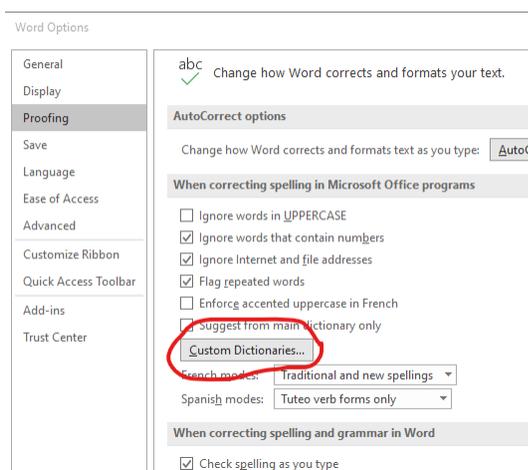
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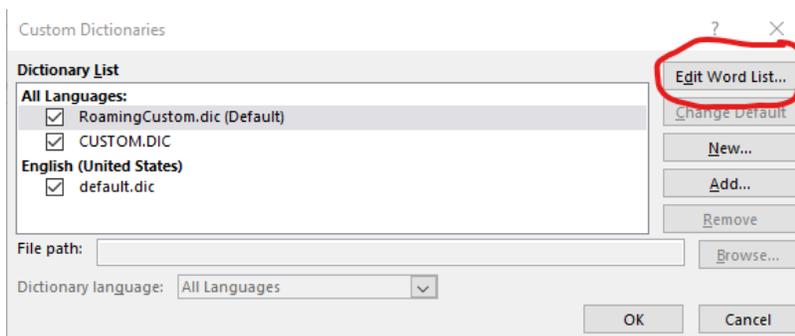
Once I've completely edited a manuscript, I run the editor as one of the final tasks. If you've taken care of a lot of these items as you went, this portion of the job becomes much more manageable.

If I'm working with uniquely spelled words or names Microsoft Word doesn't recognize, I like to add them to my dictionary, so Microsoft Word won't flag them. If the correct spelling is in the dictionary, then Microsoft Word can correctly flag typos in the spelling. To add a word to the dictionary, simply right click on the flagged word and select "Add to Dictionary" on the drop-down menu.

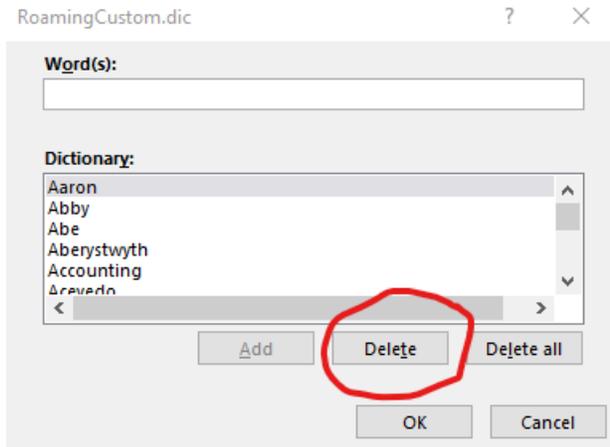
If you accidentally add a word to the dictionary, you can also delete that word from the dictionary. To do this, click on the File tab. Along the left-hand side, select the last item, Options. In the Word Options window, select the third option on the left-hand side, Proofing. Click on the button labeled "Custom Dictionaries."



Select the default dictionary for "All Languages," and click on "Edit Word List."



Then you can find the word on the list and click "Delete."



Communicating with Your Clients

It's not safe to assume all your clients know how to use Track Changes to accept and reject the changes you've made. And some clients also have trouble viewing and answering comment balloons. For these reasons, you must explain to your clients how to maximize their use of your edits (after all, they've paid a pretty penny to get them) when you return a project to them.

The main points you want to hit are identifying insertions and deletions, viewing comment balloons, and responding to comment balloons. I advise creating a template you can personalize for each client.

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LESSON #2 ASSIGNMENTS

To receive a Certificate of Completion, you must successfully complete a designated number of assignments per lesson. For this lesson, you must complete two assignments.

Assignment #1

Attached is the same document you edited last week. Open the document. Then play with the Advanced Track Changes features, and make many of the same edits you made last week. Observe how they are different, and email me your altered version. Do you like the differences? Or do you like the default settings better?

Assignment #2

Turn off your “Replace text as you type” feature.

Assignment #3

Open the Proofing area in Word Options. Explore the many ways you can customize the way Microsoft Word proofs your document. Share an option with the class we didn’t mention in this lesson that you think will be helpful in your editing.

Assignment #4

In the attached document, add one of the words that is flagged as misspelled to the dictionary. Then open your custom dictionary and delete that word from the dictionary. Tell the class about your experience.

Assignment #5

Create a template for teaching your clients how to view the changes and comments you’ve made using Track Changes. If you don’t mind your classmates learning from and using some of your creation, share it with the class. If you’d rather keep it to yourself, send it to me privately.