**Editing a Tracked Document in Word**

Please don’t be insulted if you already know all this stuff! The goal here is to make your life easier.

If you’re a visual learner, this is a good video for step-by-step instructions for how to edit a document using Word Track Changes:

https://www.youtube.com/watch?v=m-K0FlZPwCM

If you want a written version, here’s our quick guide:

* Download the document and click “Enable Editing” (it’s a yellow box at the top of the page).
* Under the “Review” tab, enable “Track Changes.”
* Along the bottom of the screen, make sure the word count matches what the client has reported and that Word is set to flag spelling and grammar issues in the English style the client has requested (United States, United Kingdom, etc.).
* Make sure you know what type of service the client has requested and that it is accurate.
* For **editing** you will:
* Correct spelling errors, grammar errors, and typos
* Make sure the format is consistent within the document and with the requested guidelines
* Make comments and suggestions that will help improve the document and refine the message
* Make changes and offer suggestions to help improve clarity, flow, structure, and readability
* For **proofreading**, you will:
* Correct spelling errors, grammar errors, and typos
* Make certain the format is consistent within the document and with the requested guidelines
* Editing v. Proofreading:
* We charge a little more for editing; if the paper needs deeper corrections (say for fluency in ESL documents), let us know, and we will suggest that the client request editing rather than proofreading. At first, we will be looking at all documents and bidding the job to the client before it ever gets to you.
* BEFORE you begin editing, **save a copy**. We use this format: document.name\_TRACKED\_COPY.
* We advise working in the “Simple Markup” pane (in the Review Tab) because you can see how the document will look to the client without the tracking (which can be distracting while you’re editing).
* Comments
* It is our opinion that it’s better if the client doesn’t see a face/name behind the editor. You will never have to deal directly with the client (let us, “customer service,” do that for you). Therefore, you will need to anonymize the comment bubble. To do this, under the “File” tab, choose “Options.” In the “General” tab (the first one that comes up), choose “Personalize your copy of Microsoft Office.” In “Username” just type in “…” and that will come up at the top of the comment bubble. If it defaults to “Author,” you will need to go to the trust center (File → Options → Trust Center → Trust Center Settings → Privacy Options → **Uncheck** “Remove personal information before opening or when saving” [remember, your personal information is “…”])
* The second or third time a writer makes a mistake, we suggest giving him/her a concise rule (see the Editor Cut-and-Paste document), but we try not to give more than about three rules per paper. Some people will learn from your comments; others just want you to fix everything and not bother them with rules.
* Be kind and polite when you make comments (e.g., don’t say “Unclear,” say “Can you clarify the wording/meaning here?”). If you want to call the writer an idiot, do it and erase it. We have given you a sheet of “cut and paste” comments that we use frequently to save you time. You’ll add to this as you spot the same errors over and over.
* It’s always nice if you can give the clients positive feedback when they do something well (e.g.,“You certainly understand the power of the three-word sentence.” “Wonderful description; I can see this character.”).
* **Returning** the document to the client:
* When you have completed the document, go to the “Changes” tab and click on “Accept all Changes.” This will give you a “Clean” copy that only shows your comments. Save it as document.name\_CLEAN\_COPY and return both to the client through us (at the beginning).
* The TRACKED\_COPY document will show all the revisions so that the client can see and review all the changes that have been made. It will also show all your comments.
* The CLEAN\_COPY document will only show your comments. The client will be instructed how to remove comments. We leave them there so they can take your advice about suggested changes and make the changes directly on the clean copy.
* When you return the work, please include a short note to the client that contains general comments and suggestions that will help the client improve the document and refine his/her message. For fiction/memoir, the comments and suggestions will focus more on how the client can improve style, develop characters, improve plot organization, provide additional details, improve voice, etc.
* If there are extensive changes that the client will need to make, you can invite him/her back for a final proofread at a discounted rate.

**Helpful Hints for Navigating Word**

**Right to Left Comments:**

Sometimes, if a document originates in the Middle East (and we usually try to avoid them), when you type comments, they will appear from right to left. To fix this:

From the Home tab click the Left-to-Right Text Direction button. [enter image description here](https://i.stack.imgur.com/qA8te.png)

**Word Shortcuts:**

Ctrl + Mouse wheel: Will make text appear smaller or larger

Ctrl + c: Will copy a selected text

Ctrl + v: Will paste a selected text

Ctrl + x: Will delete a selected text

Ctrl + i: Italicize

Ctrl + b: Bold

Ctrl + u: Begin underline or underline a selected text

Ctrl + z: Will undo what you just typed infinitely