

# Workshare 3 Quick Reference – Document Review

## Taking Charge of Document Review

Workshare 3 simplifies working on a document with people inside and outside of your firm, whether or not they have Workshare on their machines.

A single Workshare 3 review document keeps track of reviewers' changes. This means that the time-consuming work of coordinating changes in multiple versions of a document and manually entering those changes is eliminated from your work process.

In a typical Workshare 3 review cycle:


1. You send a document for review.
2. Reviewers make changes and return document.
3. You receive all reviewers' changes in a single document, and choose which to accept or reject.

Workshare 3 is integrated with Outlook email, but documents do not have to be emailed to be a part of the review cycle.

## Sending a Document to Other Reviewers

When you send a document for review using Workshare 3 Send for Review, a "W3" file is created behind the scenes. While you never need to work directly in it, the W3 file is what allows you to track the review cycle.

### To Send a Document for Review

1. Click the Show Workshare Pane  button to open the Workshare panel home page, and click the **Send** icon.  
or

Select **Workshare/Send Draft for Review**.


The Send Draft for Review page is displayed.

2. In the **Select File Type** area, select **Word Document**.

#### Select File Type

Select the format in which you want to send this document:

- PDF  Word Document

3. To send more than one document for review, click the [Browse](#) link in the **Additional Documents** area and attach any other documents that will also be included for review.
4. Click the  button. Workshare displays a progress bar and generates a blank email message with the current document(s) attached.
5. Address the email, add any additional text, and send as usual.

The email that appears in the recipient's Inbox looks like an ordinary email and attachment. If the recipient has Workshare 3 installed, additional features are displayed when the attachment is opened in Word.

## Reviewing a Document Sent to You

Whether or not you are working on a machine with Workshare 3 installed, you can open documents sent to you for review, edit them, and send them back.

### To Review a Document with Workshare 3

1. Display the email message with the attached review document.
2. Open the document attachment. The Workshare 3 panel home page opens with the **Return to Sender** icon displayed.
3. Edit the document in Word as usual.
4. Click the **Return to Sender** icon. The Return to Sender page is displayed.
5. Type any comments to appear in the response email message in the text area of the Return to Sender page.
6. When finished, click **return now** and send the email as usual.

### To Review a Document without Workshare 3

1. Display the email message with the attached review document.
2. Open and save the document attachment.
3. Review and edit the document as usual.
4. Send the document back as an email attachment.

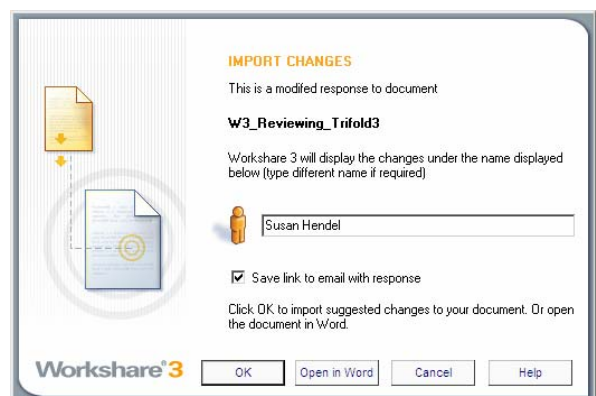
## Seeing Suggested Changes

"Importing" changes allows you to see suggested changes from reviewers without affecting the original document in any way.

### To Import Changes Automatically

When documents you sent out for review are sent back, you are prompted to import changes when you open the attachment.

1. Display the email message with the response document.
2. Open the attachment directly from the email message. The Import Changes dialog box opens.



3. Click **OK**. The document opens with imported changes displayed.

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## To Import Changes Manually

You can also import a set of changes even if the document was not originally sent for review. This process is called a *manual import*.

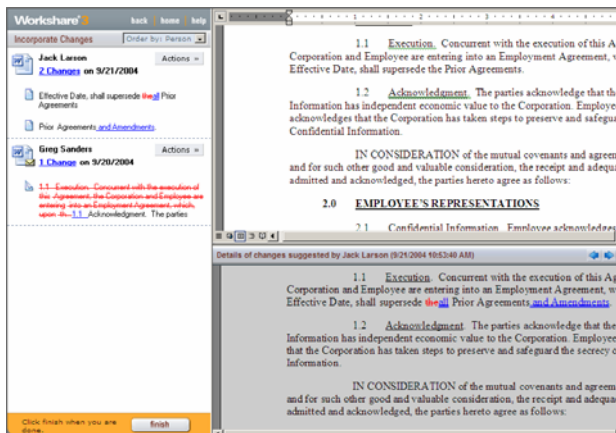
1. With the original document open in Microsoft Word, select **Workshare/Incorporate Changes** from the main menu.  
or  
In the Workshare panel home page, click the **Changes** icon. The Incorporate Changes page is displayed.
2. Click the [Import Changes](#) link. The Import Response page is displayed.
3. Click the [Browse](#) link, and find and select the document you want to import. In the Import Response page, Workshare lists the selected document under **Importing Response**.
4. In the **Name Response** area, enter the name of the person who sent the response.
5. Click the **import now** button. Workshare performs a comparison. The document opens with imported changes displayed.

## Acting on Suggested Changes

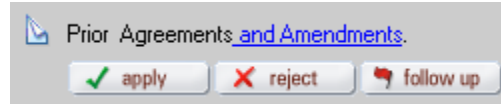
Workshare 3 allows you to see all reviewers' changes in a single document, and choose which changes to accept, reject, or flag for follow up. Even after you have saved and closed the document, you can reopen it at any time and see or modify the history of changes.

## To Incorporate Reviewers' Changes

1. After importing changes, display the original review document.
2. Click the **Changes** icon in the Workshare panel home page. The Incorporate Changes page is displayed.
3. Click the [Edit changes by Person](#) link, and click the links under any reviewer's name whose changes you want to see.



4. Click a change to display options:



5. Click one of the buttons to either apply, reject, or flag the change for later follow-up.

or

Click the **apply** button in the balloon in the original document.



or

Select **Actions, Accept/Reject All Changes** to accept or reject multiple changes at one time.

6. When you have taken action on each suggested change, click the **Finish** button. You are returned to the original document with changes applied.



**Note:** Even after closing the document, you can reopen it later and return to the Incorporate Changes page to view or modify previous actions.



**Tip:** You may want to send the revised document, along with a comparison run against the original, to the reviewers. To do this, click the **Send** icon in the Workshare panel. In the **Attach a Comparison** area, click the [Browse](#) link and navigate to the original document. Workshare sends the resulting redline document with the revised document.

## To View or Modify Document Changes

Anyone with Read/Write access to the review document can view and modify the status of reviewer changes.

1. Open the review document.
2. Click the **Changes** icon, and choose to edit changes by Person, Section, or Status.
3. With reviewer changes displayed, click **Undo** to undo a previous action, or click a different action button.