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## Taking Charge of Document Review

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Workshare Professional 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 Professional 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 Professional review cycle:

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

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


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## Sending a Document to Other Reviewers

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When you send a document for review using Workshare Professional Send Draft 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**.
3. In the **Remove Hidden Data** area, you may choose to clean Track Changes and/or Comments before sending the document.

#### Remove Hidden Data

Please select the hidden data you would like to clean:

- Track Changes (2)  
 Comments (1)

4. To send more than one document for review, click the [Browse](#) link in the **Attach Additional Documents** area and attach any other documents that will also be included for review.
5. Click the  button. A blank email message is generated with the current document(s) attached.
6. 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 Professional installed, additional features are displayed when the attachment is opened in Word.

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## Reviewing a Document Sent to You

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

### To Review a Document with Workshare Professional

1. Display the email message with the attached review document.
2. Open the document attachment. The Workshare Professional panel Review Copy page opens with the **Return** icon displayed.
3. Edit the document in Word as usual.
4. Click the **Return** icon. The Return to Sender page is displayed.
5. Choose whether to **Reply to sender only**, or **Reply to all**.
6. Type any comments to appear in the response email message in the **Your Email Comments** area.
7. When finished, click **Send** and send the email as usual.

### To Review a Document without Workshare Professional

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.

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## Seeing Suggested Changes

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"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 Modified Document dialog box opens.
3. Select **Open Original and Manage Changes**.
4. Click **OK**. The document opens with imported changes displayed.

### 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/Manage Changes** from the main menu.  
or  
In the Workshare panel home page, click the **Manage Changes** icon. The Manage Changes page is displayed.
2. Click the [Import a document](#) 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 a Document page, the selected document is listed under **Importing Response**.
4. In the **Name Response** area, enter the name of the person who sent the response.
5. Click the  button. A comparison is performed and the document opens with imported changes displayed.

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## Acting on Suggested Changes

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Workshare Professional 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.

# WORKSHARE PROFESSIONAL

## DOCUMENT REVIEW

Find help on these topics:

TAKING CHARGE OF DOCUMENT REVIEW

SENDING A DOCUMENT TO OTHER REVIEWERS  
To Send a Document for Review


REVIEWING A DOCUMENT SENT TO YOU  
To Review a Document with Workshare Professional  
To Review a Document without Workshare Professional

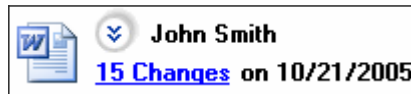
SEEING SUGGESTED CHANGES  
To Import Changes Automatically  
To Import Changes Manually

ACTING ON SUGGESTED CHANGES  
To Incorporate Reviewers' Changes  
To View or Modify Document Changes

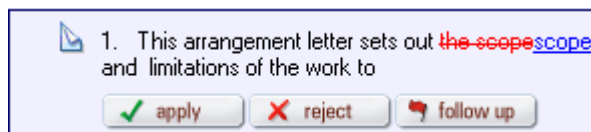
APPLYING ALL CHANGES FROM A REVIEWER  
To Use Workshare to Apply All Changes  
To Merge Changes as Track Changes

### To Incorporate Reviewers' Changes


1. After importing changes, display the original review document.
2. Click the **Manage Changes** icon in the Workshare panel home page. The Manage Changes page is displayed.
3. Select **Order by: Person**.
4. Click the  button next to any reviewer's name whose changes you want to see.



5. Click a change to display options:



6. Click one of the buttons to either apply, reject, or flag the change for later follow-up.
7. 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 Manage Changes page to view or modify previous actions.

### To View or Modify Document Changes

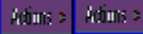
Anyone with Read/Write access to the review document can view and modify the status of reviewer changes.

1. Open the review document.
2. Click the **Manage 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.


### Applying All Changes from a Reviewer

Depending on your configuration, you can incorporate all of a reviewer's changes at once using either Workshare or by merging them with Word's track changes.

### To Use Workshare to Apply All Changes

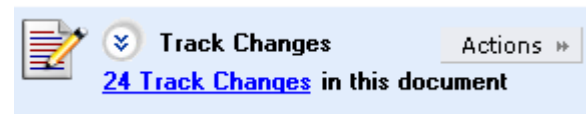
1. After importing changes, display the original review document.
2. Click the **Manage Changes** icon in the Workshare panel home page. The Manage Changes page is displayed.
3. Select **Order by: Person**.
4. Click the  button next to the person whose changes you want to apply.
5. Select **Accept/Reject All Changes using Workshare**. A marked checkbox will appear next to each change.
6. Clear any checkboxes next to those changes on which you wish to take no action.
7. Click **apply selected**, **reject selected**, or **undo selected** to apply that action to all marked changes.

### To Merge Changes as Track Changes


 **Caution:** This method eliminates the ability to audit changes, the ability to manage changes by person, and you cannot undo changes once applied. When you merge changes with Word's track changes, you also import all style and format changes.

If you require more control over the changes, do not select this option.

1. Follow steps 1 – 4, above.
2. From the **Actions** drop-down menu, select **Merge Changes as Track Changes**. A warning dialog box is displayed.
3. Click **Yes**. The changes are merged with Word's track changes and displayed in a row at the top of the Manage Changes panel.



4. Click the **Actions** button and select **Show Changes** or click the [\[Number of\] Track Changes](#) link.
5. For each change, click the **accept** or **reject** button.

 **Caution:** Once you apply a change that is merged with Word's track changes, it cannot be undone.