

Taking Charge of Document Review

Workshare Professional simplifies working on a document with people inside and outside of your firm, whether or not they have Workshare Professional 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 Microsoft Outlook but documents do not have to be emailed to be part of the review cycle.

Sending a Document to Reviewers

When you send a document for review, a W3 file is created behind the scenes. While you never need to work directly in it, the W3 file is what enables you to track the review cycle.

To send a document for review:

1. Open the document that you want to send for review.
2. In the Home page of the Workshare Panel, click Send. The Send Draft For Review page is displayed.
3. In the Select File Type area, select the format in which you want to send the document, Word or PDF.
4. (Optional) If you want to include a comparison with the review document when sending it, select the document against which you want to compare the review document in the Attach a Comparison area.
5. (Optional) If you want to send additional documents with the review document, select the document in the Attach Additional Documents area.

6. Click Create Email. An email message window is displayed with the review document attached.
7. Enter the address and complete the email as usual. Click Send. The file is sent to the specified recipients.

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.

Reviewing a Document Sent to You

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. Open the email message with the attached review document and open the attachment. The Review Copy page of the Workshare Panel is displayed.



2. Edit the document in Word as usual.
3. Click Return in the Workshare Panel. The Return to Sender page is displayed.
4. Select whether to Reply to sender only or Reply to all.
5. In the Your Email Comments area, enter any comments you want to include in the response email message.
6. Click Create Email. An email message window is displayed. Send the email in the usual way.

To review a document without Workshare Professional:

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

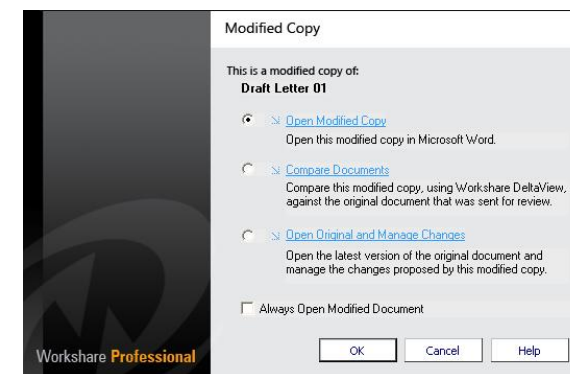
Seeing Suggested Changes

"Importing" changes enables you to see suggested changes from reviewers without affecting your original review document in any way.

To import changes automatically:

When a review document is sent back, you are prompted to import changes when you open the attachment.

1. Open the email message with the attached response document.
2. Open the attachment directly from the email message. The *Modified Copy* dialog is displayed.



3. Select Open Original and Manage Changes and click OK. The original review document is opened with the imported changes displayed.

To import changes manually:

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

1. Open your original document and select Manage Changes in the Workshare Panel.
2. In the Manage Changes page, click Import a document. The Import a Document page is displayed.
3. Click Browse and select the document you want to import. The Import a Document page is displayed as follows:



4. In the Name Response area, enter the name of the person who sent the response.
5. Click Finish. Workshare Professional imports the response by performing a comparison between the original document and the response document. When complete, the imported changes are displayed.

Acting on Suggested Changes

Workshare Professional enables 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 re-open it at any time and see or modify the history of changes.

To incorporate reviewers' changes:

1. After importing changes, open the original review document and click Manage Changes in the Workshare Panel.

2. Select Edit Changes by Person. The changes are listed in the Manage Changes page according to the name of the reviewer who proposed them.
3. Click the arrow next to a reviewer's name **John** to display the changes suggested by that reviewer.
4. Click a change to display the options.




5. Click one of the buttons to either apply or reject the change, or flag the change for later follow-up.
6. When you have taken action on each suggested change, click Finish. The original document is displayed with the changes applied and the Home page displayed in the Workshare Panel.



Note: Even after closing the document, you can re-open 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 review and modify the status of reviewer changes.





1. Open the review document and select Manage Changes in the Workshare Panel.
2. Select to edit changes by person, section or status.
3. Select a change and click  to undo a previous action, or click another action button (apply, reject or follow up) as required.

Applying All Changes from a Reviewer

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

To use Workshare Professional to apply all changes:


1. After importing changes, open the original review document and click Manage Changes in the Workshare Panel.

2. Select Edit Changes by Person.
3. In the Manage Changes page, click the arrow  to the right of the reviewer's name whose changes you want to apply and select Accept/Reject All Changes using Workshare from the dropdown menu displayed. A selected checkbox is displayed next to all changes suggested by that reviewer.
4. De-select any checkboxes next to those changes for which you want to take no action.
5. Click one of the following buttons    to apply, reject or flag all of the selected changes.

To merge changes as track changes:



Warning: This method eliminates the ability to audit changes or manage changes by person. Also 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 use this option.

1. After importing changes, open the original review document and click Manage Changes in the Workshare Panel.
2. Select Edit Changes by Person.
3. In the Manage Changes page, click the arrow  to the right of a reviewer's name and select Merge Changes as Track Changes from the dropdown menu displayed. A warning message is displayed.
4. Click Yes. Any previous actions performed on the changes will be ignored and all changes will be listed as track changes. Microsoft Word detects the changes between the response document and the original document and lists them as track changes in the Track Changes area of the Manage Changes page of the Workshare Panel.
5. For each change, you can select to accept or reject the change as required.



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