



Microsoft Word 2016

Collaborating

INFOCUS COURSEWARE

Designed to fast-track you through the process of learning about computers and information technology, the *In Focus* range is a unique and innovative concept in learning.

A quick reference summary of key procedures is provided at the bottom of each page together with handy tips and additional information.

Each title in the *In Focus* series can be used as:

- a classroom workbook for instructor-led teaching and training;
- a self-study guide for self-paced learning;
- a tutorial guide for distance education programs;
- a resource collection of just-in-time support and information for help desk users and support staff;
- a handy, desk-side reference for computer users.

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Microsoft Word 2016
Collaborating

MICROSOFT WORD 2016

COLLABORATING

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READ ME FIRST

In case you're not familiar with the terminology, *Read Me First* is quite often the name given to a computer file that contains important information for people to know prior to using an application.

This section contains some important information to help you use this book so we thought we'd start with a *Read Me First* section.

What skills and knowledge you will acquire...

The skills and knowledge acquired in Microsoft Word 2016 - Collaborating are sufficient to be able to use and operate the software effectively.

What you'll need to know before beginning this course...

Microsoft Word 2016 - Collaborating assumes little or no knowledge of the software. However, it would be beneficial to have a general understanding of personal computers and the Windows operating system environment.

The objectives of this guide...

At the completion of this course you should be able to:

- work with document properties
- use reviewing and commenting tools when editing documents
- understand and use the tracking feature in **Word**
- compare multiple versions of the same document
- create and remove protection for your document

What you get in a chapter...

Each chapter begins with a summary page listing the topics covered in that chapter. The chapter then consists of single-page topic sheets pertaining to the theme of the chapter.

What you'll need to have before commencing this course...

Many of the topics in this learning guide require you to open an existing file with data in it. These files can be obtained from your instructor and need the product code for this course which is CollaboratingInWord.

As you work through this guide...

It is strongly recommended that you close all open files, if any, prior to commencing each new chapter in this learning guide. Each chapter, where relevant, has its own set of exercise files and any from a previous chapter are no longer required.

Where to from here...

Have a look at the next page which explains how a topic page works, ensure that you have access to the exercise files (see above), and you're ready to make a start.

WORKING WITH TOPIC SHEETS

The majority of this book comprises single-page topic sheets. There are two types of topic sheets: **task** and **reference**. The layout of both is similar – an *overview* at the top, *detail* in the centre and

additional reference (optional) material at the bottom. *Task* sheets contain a *Try This Yourself* step-by-step exercise panel in the detail area as shown below.

Word Processing Simple Documents

1

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OPENING A DOCUMENT

Although there are a number of different ways to open a Word file, which include using the **Start** menu or clicking directly on an icon of the file, perhaps the best and simplest way to do it is from within the Word program itself using the **File > Open** command. The **Open** dialog box has tools that help you to identify file types and location.

Try This Yourself:

Before you begin ensure that *Word 2000* has started.

- 1 Select **File > Open** to display the **Open** dialog box.
- 2 Click on the drop arrow for **Look in** to display a list of possible locations available to your computer where documents may be found.
- 3 Click on **Drive C (C:)** or its equivalent on your computer.
- 4 The contents of drive C: will now be displayed in the **Open** dialog box...
- 5 Double-click on **Course Files For Word 2000** – this is the folder where files for this course can be found.
- 6 The contents of the folder **Course Files For Word 2000** will now be displayed...
- 7 Click on **W002 Document Essentials_1.doc** to select it as the file that you wish to open, then click on **[Open]** to open the document on the screen.

For Your Reference...

To open a document in Word:

1. Select **File > Open** to display the **Open** dialog box.
2. Locate the file and folder (if necessary)
3. Click on **[Open]**

Handy to Know...

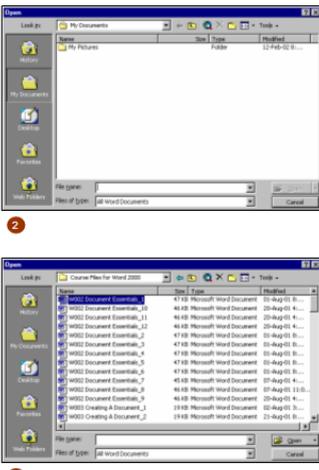
There is more than one way to open a document in Word. Alternatively you could:

- Click on the **Open** tool
- Select a recently opened file from the **File** menu.

2

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6



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Chapter 2: Working With A Document

- 1 Topic name
- 2 General topic overview provides an introduction to the topic
- 3 *Try This Yourself* (Task-based topic sheets) is a detailed step-by-step practice exercise for you to work through. In *Reference* topic sheets this is usually replaced by a box with reference information.
- 4 In *Task* topic sheets screen shots and graphics provide a visual clue as to what will happen when you work through the *Try This Yourself* practice exercise. In *Reference* topic sheets the screen shots and graphics are used to visually represent information and concepts.
- 5 The *For Your Reference* (optional) element provides a quick summary of the steps required to perform a task. These usually only appear in Task-based topic sheets.
- 6 The *Handy To Know* (optional) element provides additional information such as alternate ways of accomplishing a task or further information providing handy tips.

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Preface

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CHAPTER 1

DOCUMENT PROPERTIES

InFocus

Document properties help to describe a document and contain specific information about a document, such as its title, author name, company, subject, template on which it is based, keywords and the like. Properties also contain statistical information about a document, such as the number of pages, lines, words and characters. As such, adding properties to a document is a useful way to categorise and identify documents.

In this session you will:

- ✓ gain an understanding of document properties
- ✓ learn how to view document properties
- ✓ learn how to specify document properties
- ✓ learn how to view advanced properties
- ✓ learn how to insert properties into a document
- ✓ learn how to update document properties
- ✓ learn how to delete property data
- ✓ learn how to remove personal information.

UNDERSTANDING DOCUMENT PROPERTIES

To make it easier to identify and locate documents, a set of **properties** exist for each document. As well as the standard properties that are added by Word when you save a document,

you can also add a range of other data to a document's properties. Document properties are also known as **meta data**, which in turn is described as data that describes other data.

Automatically-Updated Properties

Document properties help to describe a document in some way. When you save a document, Word will add data to certain properties automatically and then update these properties as the information changes. Some of these properties can be edited, while others cannot. Some of the properties that you cannot edit include:

- **General properties:** such as the file name and file type, as well as the file location and file size. The creation date, modified date and date the document was last accessed are types of general properties.
- **Statistical properties:** the creation date, modified date and last-accessed date are also types of statistical properties. Other statistical properties include total editing time, total number of pages, paragraphs, lines, words and characters in the document.

Summary Properties

Summary properties can be edited by the user. These properties hold the data that helps to categorise and search for the document. Summary properties include author, title, subject, tags, keywords, category, status and comments. Some of these properties are added by default when you save a document, such as the author and document title. You can add to or edit these properties as required.

Accessing Document Properties

There are several ways to access a document's properties:

- Click on the **File** tab to display **Backstage** view and select **Info**. The **Properties** pane will appear on the right and displays basic document properties.
- The **Properties** dialog box (right) contains all properties for a document. The dialog box includes tabs for **General**, **Summary**, **Statistical**, **Content** and **Custom** properties. You can access the **Properties** dialog box by clicking on **[Properties]** in **Info** in **Backstage** view and selecting **Advanced Properties**.

VIEWING DOCUMENT PROPERTIES

There are several ways to view document properties. The **Properties** pane via **Info** in **Backstage** view displays basic summary properties, most of which you can edit. As well as

the **Properties** pane, you can view and add properties to the **Document panel**, which is displayed on the screen under the ribbon.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Properties_1.docx...*

1

Click on the **File** tab and ensure that **Info** is selected

The **Properties** pane will appear on the right side of the screen, displaying common properties. Let's view more properties...

2

Click on **Show All Properties** under **Related Documents** in the bottom right of the screen to expand the list of properties

The pane will expand to display all editable document properties

Info

Properties_1

C: > Courseware Content > Microsoft Word 2016 > Exercise Files

Protect Document
Control what types of changes people can make to this document.

Check for Issues
Before publishing this file, be aware that it contains:
 Document properties and author's name
 Content that people with disabilities find difficult to read

Manage Document
Check in, check out, and recover unsaved changes.
 There are no unsaved changes.

Properties ▾

Size	14.1KB
Pages	1
Words	320
Total Editing Time	1 Minute
Title	Add a title
Tags	Add a tag
Comments	Add comments
Template	Normal
Status	Add text
Categories	Add a category
Subject	Specify the subject
Hyperlink Base	Add text
Company	Specify the company

Related Dates

Last Modified	Today, 10:19 AM
Created	Today, 10:19 AM
Last Printed	

Related People

Manager	Specify the manager
Author	Cary Hampton
	Add an author
Last Modified By	Ivana Robinson

Related Documents

Open File Location

[Show Fewer Properties](#)

1

For Your Reference...

To **view document properties**:

1. Click on the **File** tab and select **Info**
2. Click on **Show All Properties** to view all summary properties, or
Click on **[Properties]** and select **Show Document Panel**

Handy to Know...

- The **Properties** pane displays all editable properties, while the **Document panel** displays common, editable properties.
- Click on **Open File Location** in the **Properties** pane to open **File Explorer** and display the folder where the document is saved.

SPECIFYING DOCUMENT PROPERTIES

You can add data to your document properties at any time. Specifying **document properties** such as keywords or tags, can help you or others to search for and identify the file in future. You can

add data to your document's properties in the **Properties** pane or in the **Document panel**. Some information is added by Word, but you can add and edit data according to your needs.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Properties_2.docx...*

1 Ensure the **Info** section of the Backstage is displayed, then click in **Add a Title** and type **Staff Induction Information**

2 Press **Tab** to move to **Tags** and type **Induction, new staff, hazards, telephone faults, ergonomics, passwords**

Let's update the Author property in the Properties panel...

3 Right-click on the value in **Author** and select **Remove Person**

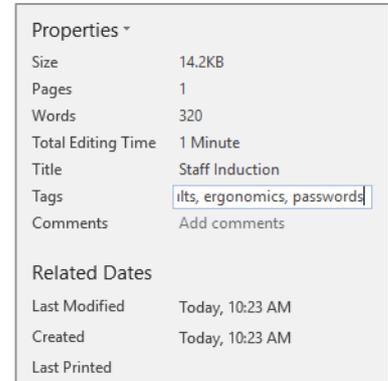
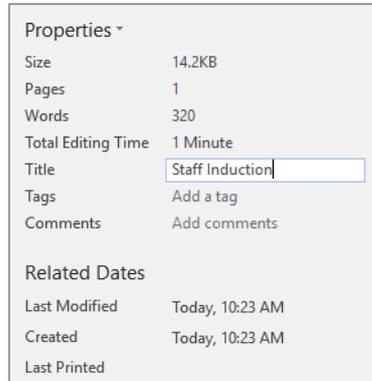
The field will now have no data...

4 Click on **Add an author** and begin typing your name

If your name is in the company address book, it will appear in the pane below...

5 If your name appears, click on it to add it or continue typing your name and press **Enter**

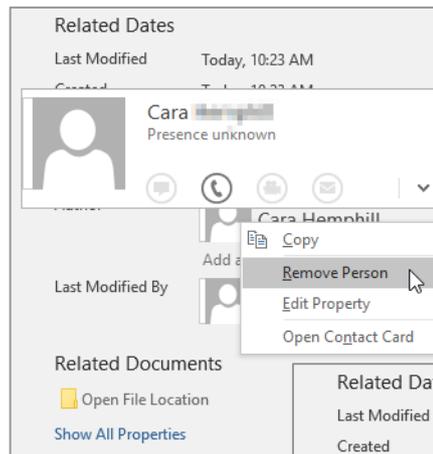
6 Click on the **Back** arrow to return to the document



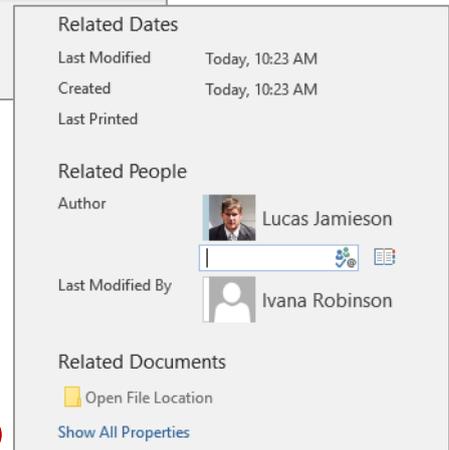
1

2

3



5



For Your Reference...

To **specify document properties**:

- Click on the **File** tab, select **Info**, click on **View All Properties**, click in a field, then type the required data, or
- Click on the **File** tab, select **Info**, click on **[Properties]**, select **Show Document Panel** then add the required data

Handy to Know...

- When you create a new document, the **Author** field displays the **User name** specified in **Word Options**. To update the default user name, click on the **File** tab and select **Options**. In the **General** options, select the text for **User name** and type your name. Click on **[OK]**.

VIEWING ADVANCED PROPERTIES

In addition to the properties in the **Properties** pane and **Document panel**, there are also **Advanced Properties** that give you more information about a document. Some of these are

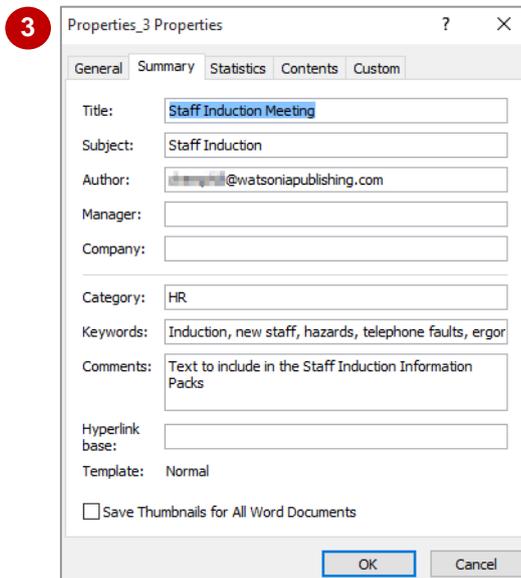
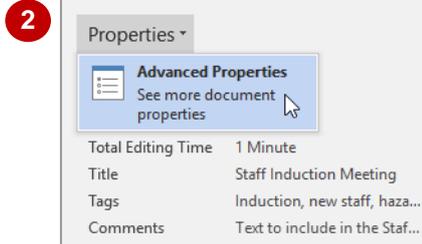
system properties and properties defined by Word, such as the creation date, file location and file size. **Advanced Properties** can be accessed via the **Properties** pane.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Properties_3.docx...*

- 1 Click on the **File** tab and click on **Info** to display the **Properties** pane
- 2 Click on **[Properties]** and select **Advanced Properties** to open the **Properties** dialog box, then click on the **General** tab
The Properties dialog box enables you to view all available properties, with each tab displaying different property types...
- 3 Click on the **Summary** tab to display all editable properties
This includes the information that has been entered by the user in the Document or Properties panel...
- 4 Click on the **Statistics** tab to see information such as the number of pages, lines and paragraphs in the document
- 5 Click on the **Contents** tab to view the information
- 6 Click on the **Custom** tab
Here you can add your own custom property fields...
- 7 Click on **[OK]** to close the **Properties** dialog box, then click on the **Back** arrow to return to the document



For Your Reference...

To **view advanced properties**:

1. Click on the **File** tab and select **Info**, then click on **[Properties]** in the **Properties** pane
2. Select **Advanced Properties**

Handy to Know...

- You can edit the data on the **Summary** and **Custom** tabs of the **Properties** dialog box, but the rest of the data is generated by Word and cannot be edited.
- You can also right-click on a file in **File Explorer** and select **Properties** to access document properties.

INSERTING PROPERTIES INTO A DOCUMENT

One of the advantages of maintaining document properties is that you can insert property data into a document, such as the author or company name. This is done by inserting **content controls**

that hold the data into the document. Not only is this a quick method of inserting standard information into a document, but it will also update automatically when the property data changes.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Properties_4.docx...*

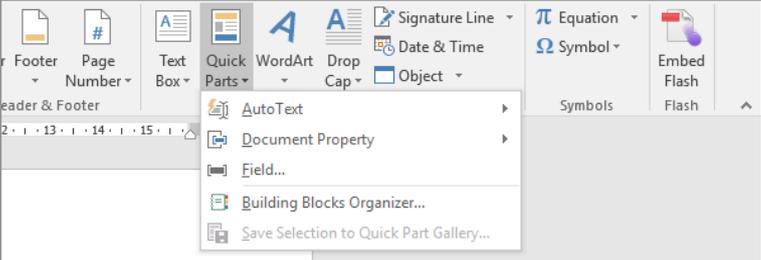
- 1 Click at the end of the first heading and press **Enter** to create a new line
- 2 Type **Prepared by:** and press **Space**
- 3 Click on the **Insert** tab, then click on **Quick Parts** in the **Text** group
- 4 Point to **Document Property**, then select **Author**
The author's name will appear in the Author content control...
- 5 Press **End**

2 **Staff Induction Information**
Prepared by: |

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

Incident and Hazard Reporting
Incidents, accidents and hazards are those situations or combinations of events that may lead, or

3



4 **Staff Induction Information**
Prepared by: **Author** |@watsoniapublishing.com|

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

Incident and Hazard Reporting
Incidents, accidents and hazards are those situations or combinations of events that may lead, or

For Your Reference...

To **insert property data** into a **document**:

1. Click where you want to insert the content control
2. Click on the **Insert** tab, then click on **Quick Parts** and select **Document Property**
3. Select a property field name

Handy to Know...

- If the property field that you want to insert does not appear in the **Document Property** list, select **Field** instead. This displays the **Field** dialog box and gives you access to a full list of content controls that you can insert.

UPDATING DOCUMENT PROPERTIES

If you have inserted **content controls** into a document, the data in the control will be updated automatically when the related document property is modified in any way. This ensures that

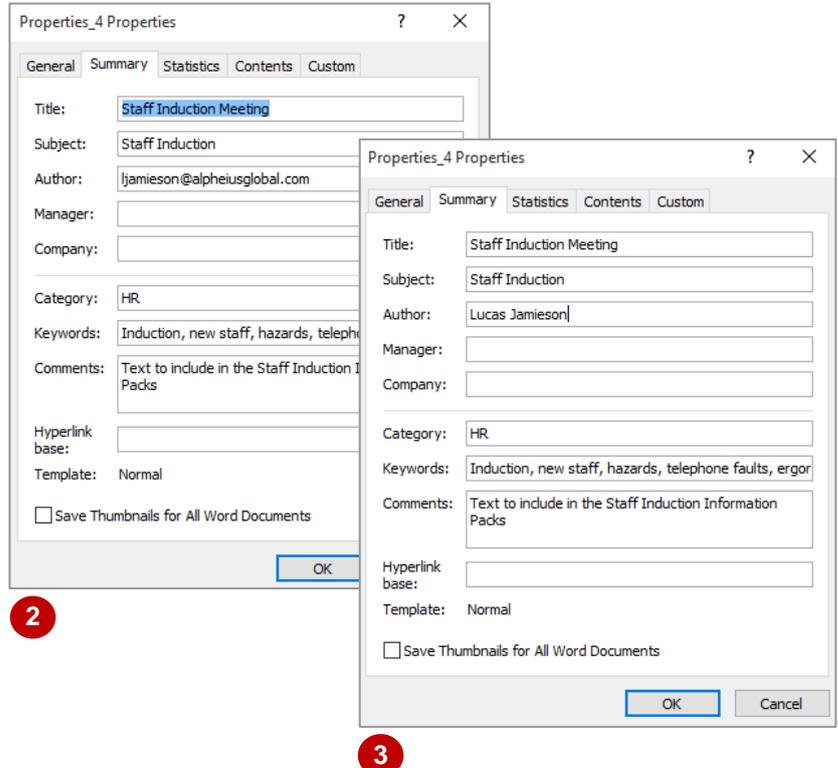
your document always contains the most accurate and up to date information.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Properties_5.docx...*

- 1 Click on the **File** tab and ensure **Info** is selected
Let's change the Author property so that the name rather than the email address is displayed. Note that if you have used a name that is not in the company address book, the name rather than the email address will appear...
- 2 Click on the drop arrow for **Properties** and select **Advanced Properties** to open the **Document Properties** dialog box
- 3 Ensure the **Summary** tab is selected, then type the name of the person in **Author**
If the name already appears, type the relevant email address instead...
- 4 Click on **[OK]** to apply the changes and close the dialog box
- 5 Click on the **Back** arrow to return to the document and view the change



Staff Induction Information

Prepared by: Lucas Jamieson

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

Incident and Hazard Reporting

Incidents, accidents and hazards are those situations or combinations of events that may lead, or

For Your Reference...

To **update document properties**:

- Click on the **File** tab and select **Info** then modify the property fields as required in the **Properties** panel, or
- Modify the value in the **content control** in the document

Handy to Know...

- If a content control appears more than once in document, you need only update one control and the remaining controls will be updated automatically with the modified data.

DELETING DOCUMENT PROPERTY DATA

If you realise that you no longer require some of the property data that you've entered into the document's properties, you can **delete** it by editing the fields in the **Document panel**,

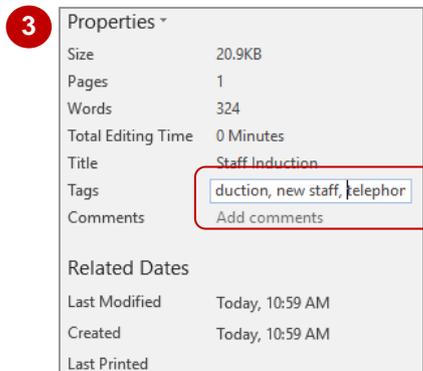
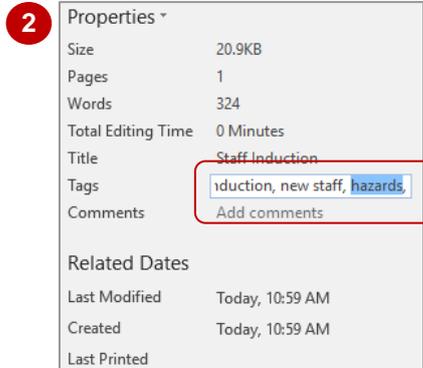
Properties pane or the **Properties** dialog box. You may want, for instance, to do this to delete sensitive or confidential information that is for your organisation's internal use only.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *Properties_6.docx...*

- 1 Click on the **File** tab and select **Info**
- 2 Double-click on the word **hazards** in the **Tags** field to select it
- 3 Press **Del** three times to delete the word **hazard** as well as the comma and space after it
- 4 Click on the **Back** arrow to return to the document



For Your Reference...

To **delete property data**:

1. Click on the **File** tab and select **Info**, then click on **Show All Properties** if required
2. Click in the property field to select the data
3. Press **Del**

Handy to Know...

- You can remove a **content control** from a document by right-clicking on the control and selecting **Remove Content Control**. Unless you actually delete the contents of the control, however, deleting the control will not remove the property data.

REMOVING PERSONAL INFORMATION

Some properties cannot be deleted, such as those generated by Word. But data, such as who last saved the document, the name of the template as well as the information in the

Summary, Statistics and **Custom** tabs in the **Properties** dialog box, can be removed by the **Document Inspector**. This will protect the privacy of the owner of the document.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Properties_7.docx...*

1 Click on the **File** tab and select **Info**, then click on **[Check for Issues]** and select **Inspect Document** to open the **Document Inspector** dialog box

2 Click on **[Inspect]**
The inspection process will run and the results will indicate that Document properties were found...

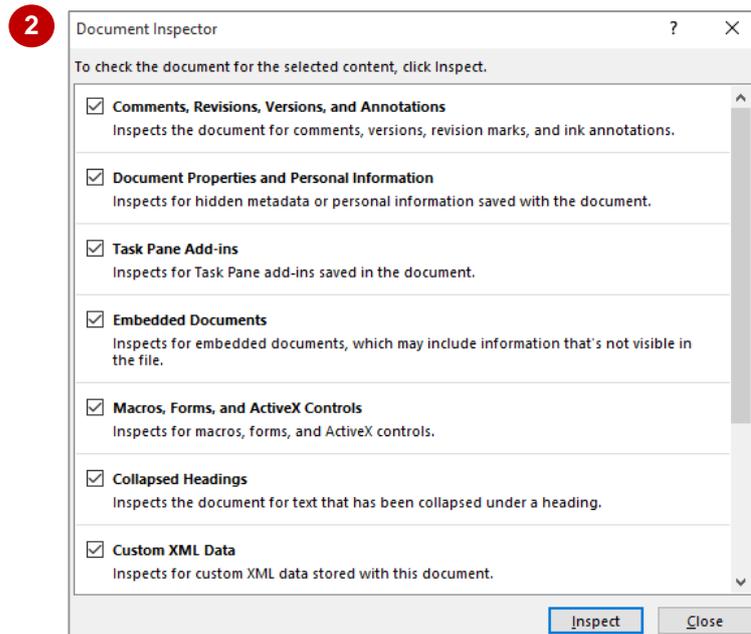
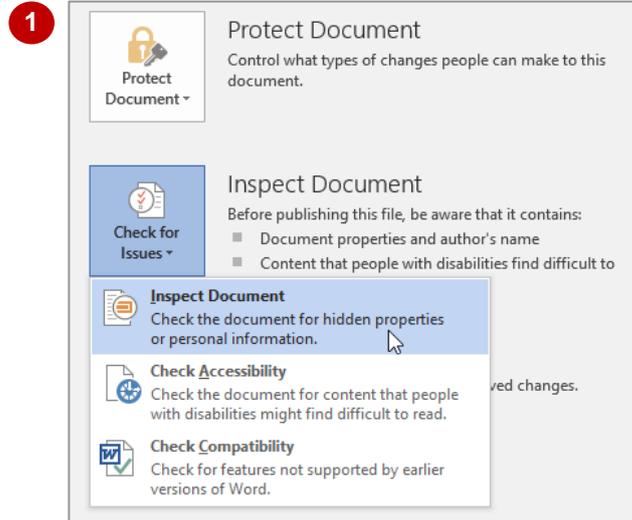
3 Click on **[Remove All]** next to **Document Properties** to remove the properties, then click on **[Close]** to close the **Document Inspector**

You will now see that all of the editable property data has been deleted in the **Properties** pane...

4 Click on the drop arrow for **Properties** and select **Show Document Panel**

All property fields are empty...

5 Click on **[OK]** to close the dialog box



For Your Reference...

To **remove personal information**:

1. Click on the **File** tab, then click on **[Check for Issues]** and select **Inspect Document**
2. Click on **[Inspect]**
3. Click on **[Remove All]**
4. Click on **[Close]**

Handy to Know...

- The **Document Inspector** can also remove other information that can be used to identify the author or company, including comments and revisions, XML data, headers and footers, and hidden text.

NOTES:



CHAPTER 2 DOCUMENT COMMENTING

InFocus

Editors and reviewers alike should be delighted with the range of electronic editing tools at their disposal in Word. Gone are the days of hard-copy mark-ups (unless that's the way you like it!), margin notes and the rest. With Word's **Comment** tool, you can insert comments into a document that will appear in the margin. There is no need to print the document first (one step closer to the paperless office, perhaps?).

Another useful feature is being able to highlight specific text for review or comment. This obviously draws attention to the text that needs to be edited.

In this session you will:

- ✓ learn how to insert comments
- ✓ learn how to edit and delete comments
- ✓ learn how to print comments.

INSERTING COMMENTS

Editing or reviewing a document typically involves printing out the document and then marking-up the hard copy. This includes making comments and suggestions, or providing feedback, for

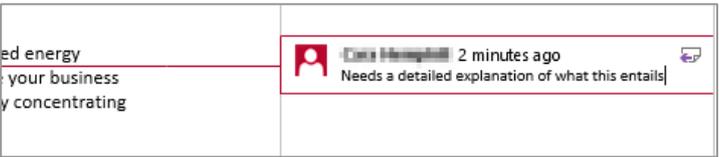
example. With Word's **Comment** tool, you can insert comments into a document, which will appear in the margin, making it possible to edit or review a document totally on-screen.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Commenting_1.docx...*

- 1 Select the text **Energy Management Policy** in the first paragraph
- 2 Click on the **Review** tab, then click on **New Comment** in the **Comments** group
A comment balloon with your name Needs appears in the margin and is linked to the selected text...
- 3 Type **Needs a detailed explanation of what this entails**
- 4 Click elsewhere to deselect the comment
- 5 Select the heading **Lighting**
- 6 Click on **New Comment** in the **Comments** group to add another comment
The initials are sequentially numbered...
- 7 Type **Should be placed under the 'Air Conditioning' section**
- 8 Click elsewhere to deselect the comment

- 1 **Energy and Business**
There are a number of strategies that businesses can adopt to work towards reducing emissions. For example, by preparing an **Energy Management Policy**, you can become more energy aware and thereby save energy. Your business can also save energy on:
- 2 
- 3 
- 4 
- 5 **Lighting**
You can improve the effectiveness of lighting, thereby reducing usage, emissions and remembering to switch lighting off when not required makes adequate savings to state. Ensuring the proper placement of lighting is also important and installing the correct lighting for the intended task – for instance, lighting over work stations should be made that for a waiting room.
- 7 

For Your Reference...

To **insert** a **comment**:

1. Select the text
2. Click on the **Review** tab
3. Click on **New Comment** in the **Comments** group
4. Type the comment

Handy to Know...

- When you move or cut and paste text that has one or more comments attached to it, the comments will move with the text, even across pages.
- Each element can have more than one comment so you can comment on multiple issues or discuss an issue in detail.

WORKING WITH COMMENTS

There are several things that you can do with comments in a document. You can view a set of comments by clicking on its icon. If you're involved in co-authoring a document, you can

reply to comments made by other authors. You can collapse individual comments to declutter the comment box, perhaps as you address the issue. And, finally, you can delete unwanted comments.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Commenting_2.docx*...

- 1 Point to the comment for **Energy Management Policy** in the first paragraph and click on the **Reply** icon

Let's assume you're co-authoring and you want to reply to the comment...

- 2 Type **Good idea. I will include one in the Appendix**

- 3 Click outside the comment pane to close it

You can mark a comment as done...

- 4 Right-click on the comment **Needs a detailed explanation of what this entails** to display a menu of options

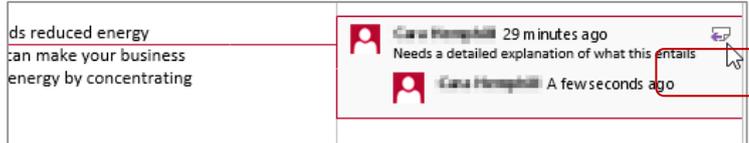
- 5 Select **Mark Comment Done**

The comment and the reply will be greyed out.

Let's delete a comment

- 6 Click on the comment **Should be placed under the 'Air Conditioning' section** to select it

- 7 Click on the **Review** tab and click on the top half of **Delete** in the **Comments** group to delete the comment



1



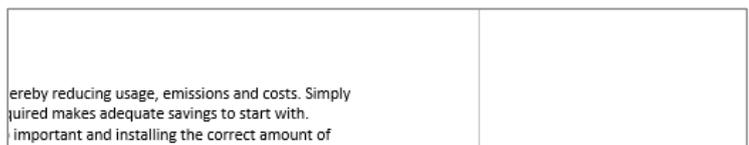
2



3



5



6

For Your Reference...

To **edit** a **comment**:

- Select the text in the comment balloon and make the required editing changes, or
- Click on the comment balloon then click on the **Review** tab and click on **Delete** in the **Comments** group

Handy to Know...

- If you point to the profile picture beside the name of the person who commented, their contact card will display.

PRINTING COMMENTS

The **Reviewing pane** appears along the right hand edge of the page and allows you to see the comments in the document. You can also print a list of the comments in the document. Using the

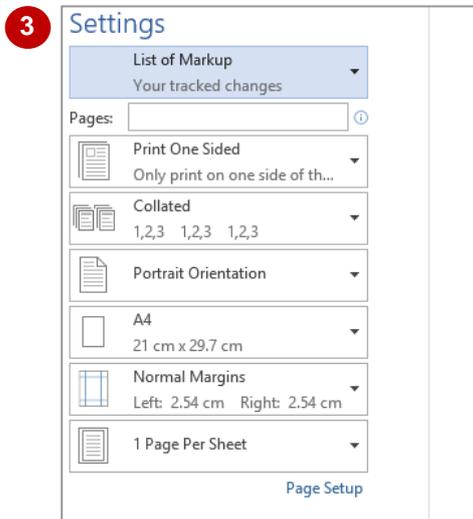
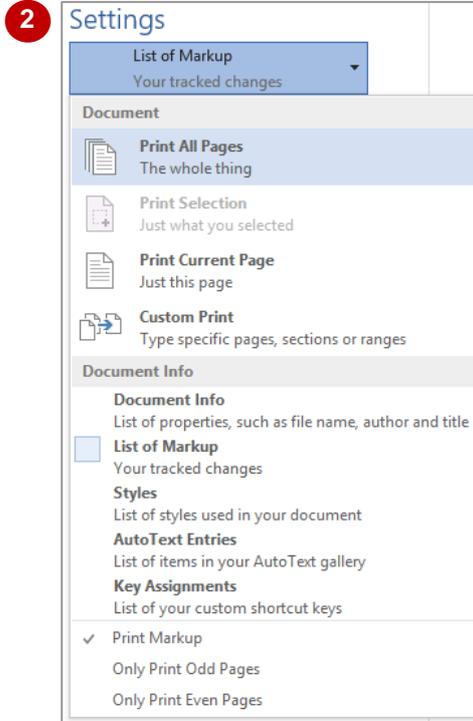
Print options, you are able to select to print only the comments and tracked changes made to the document. Printed comments also display the relevant page number, author, date and time.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *Commenting_3.docx...*

- 1 Click on the **File** tab and select **Print** to display the printing options in **Backstage** view
- 2 Click on the drop arrow for **Print All Pages** in **Settings** to see a list of printing options
- 3 Click on **List of Markup** to select it
- 4 Click on **[Print]** to print a list of comments



For Your Reference...

To **print comments**:

1. Click on the **File** tab and select **Print**
2. Click on the drop arrow for **Print what**
3. Click on **List of Markup**
4. Click on **[OK]**

Handy to Know...

- To print the document displaying the comments, in the **Print** options in **Backstage** view, click on the drop arrow for **Print All Pages** in **Settings** and ensure that **Print Markup** appears with a tick.

CHAPTER 3 TRACKING CHANGES

InFocus

If you are working on a document that needs to be edited and reviewed by others, then Word's **Tracking** feature may prove indispensable. When this feature is turned on, Word will record and highlight all editing changes made to the document. Word allows you to display the original text as well as the edited text in the document. The editor or reviewer can then choose to either accept or reject these changes.

In this session you will:

- ✓ gain an understanding of tracked changes
- ✓ learn how to enable and disable tracked changes
- ✓ learn how to work with **Simple Markup** view
- ✓ learn how to use comments when tracking changes
- ✓ learn how to show specific types of revisions
- ✓ learn how to show revisions inline and in balloons
- ✓ gain an understanding of advanced tracking options
- ✓ learn how to accept and reject changes.

UNDERSTANDING TRACKING CHANGES

When you are collaborating on a document, it is easy to forget who did what and when. That's where the **Track Changes** tool comes in! Track Changes enables all edits and revisions to be

tracked and displayed in the document without losing track of the original text. Then all revisions can be reviewed and either accepted or rejected by the author as required.

What is Track Changes?

Track Changes enables you to edit a document electronically (on-screen) and then review those changes, by either accepting or rejecting them. As the name suggests, **tracking** does not remove the original text from the document; it simply marks the change. In this way, you are able to clearly see where the changes have been made and what those changes are.

Why Use Track Changes?

Track Changes is particularly useful when you are working on a document with others who provide input, feedback and the like. A document can be written by one individual and then sent to another to edit. The editor's changes are recorded alongside the original text, and the author can then consider each change and either accept or reject that change.

If you accept a change, Word will remove the original text and replace it with the revised text. If you reject a revision, Word will remove the revision and reinstate the original text.

Track Changes also enables more than one person to edit a document, and each person's revisions can be distinguished from another's. You are able to display all reviewers' marks simultaneously, or select an individual reviewer's marks to be displayed.

The Revisions Pane

As well as viewing changes *within* the document, Word provides you with the **Revisions** pane which lists all changes made to the document and who made these changes. The **Revisions** pane also tells you how many changes there are in total and how many changes fit into the category of **Insertions**, **Deletions**, **Moves**, **Formatting** and **Comments**.

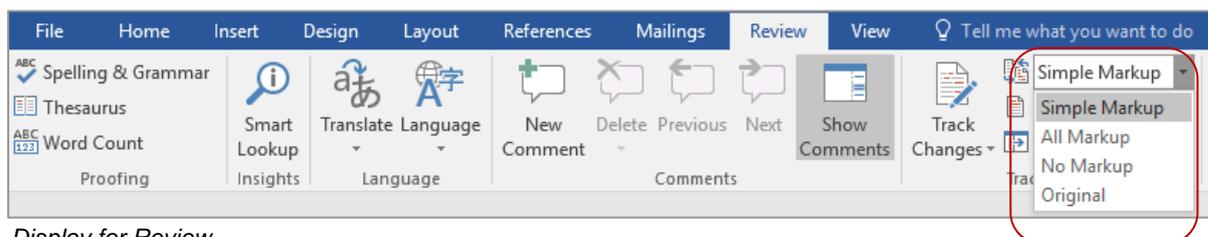
Display for Review

Word provides you with a number of markup views which display markup in different ways. Markup is the way your revisions are highlighted within a document.

Simple Markup is the default view and will automatically be selected in the **Display for Review** drop menu in the **Tracking** group when you enable **Track Changes** (as shown in the image below). It allows you to view your document without all the clutter of tracked changes, while still being able to see where changes have been made in the document. Word makes this possible by marking any changes made to the document with a red markup line in the left margin near the relevant paragraph.

Clicking on the red markup line allows you to switch to **All Markup** view which displays all markup within your document. When in **All Markup** view the markup line changes to grey. Clicking on the grey markup line will return the document to **Simple Markup** view.

As well as the **Simple Markup** and **All Markup** views, there are also two other views – **No Markup** and **Original**. The **No Markup** view will display your document as it appears *with* the changes made, with no markup or indication of the original text while the **Original** view displays your document with no markup and as it appeared *before* any changes were made.



Display for Review drop menu with the Simple Markup view selected by default

ENABLING AND DISABLING TRACKED CHANGES

To track changes in your document, you first need to turn the **Track Changes** feature on. Tracking is controlled by a tool which is toggled on and off. Once the option is enabled, you will

see the revisions appear on-screen as you edit. Note that when you turn **Track Changes** on, the feature will remain enabled until you turn it off.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Tracking Changes_1.docx...*

- 1 Click on the **Review** tab, then click on the top half of **Track Changes** in the **Tracking** group

The tool stays highlighted, which means that Track Changes is enabled...

- 2 Ensure that **Simple Markup** is selected in **Display for Review**

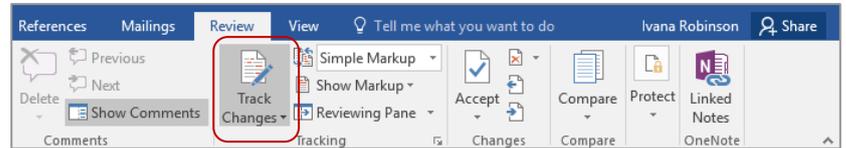
- 3 Select the word **instance** in the second sentence and type **example** to replace the word

The only indication that a change has been made is the red markup line to the left of the paragraph. This is because Simple Markup view is selected by default...

- 4 Repeat step 1 to turn off **Track Changes**

If you made a change now it would not be tracked.

Notice the red markup line for the change you made in step 2 still remains, as any tracked changes in your document must be accepted or rejected before the markup is removed

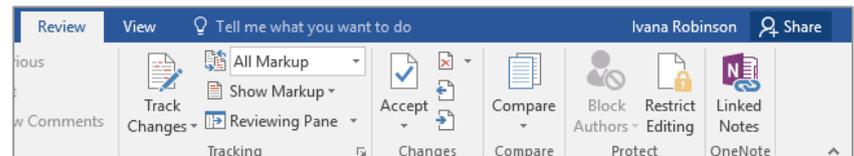


1

Energy and Business

There are a number of strategies that businesses can adopt to work towards reduced energy emissions. For example, by preparing an Energy Management Policy, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on:

3



4

For Your Reference...

To **enable** and **disable Track Changes**:

1. Click on the **Review** tab
2. Click on the top half of **Track Changes** in the **Tracking** group

Handy to Know...

- If you click on the bottom half of **Track Changes** in the **Tracking** group you can select **Lock Tracking** which enables you to protect the tracking within the document with a password so that other authors cannot turn tracking off when editing the document.

SWITCHING BETWEEN SIMPLE MARKUP AND ALL MARKUP

Simple Markup is the default view for tracked changes and as such will probably be the view that you work with the most regularly. When in **Simple Markup** view, the tracked changes do

not display in the text. Instead you must switch to **All Markup** view in order to see the markup for the tracked changes within the document.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Tracking Changes_2.docx...*

1 Click on the **Review** tab, ensure **Track Changes** in the **Tracking** group is enabled and that **Simple Markup** is selected in the **Display for Review** drop menu

2 Select the text **Energy Management Policy** in the first paragraph and press **Ctrl** + **B** to make the text **Bold**
A red markup line will not appear as there is already one existing for this particular line in this paragraph due to changes made in the previous exercise...

3 Select **and** in the first heading and type **&** to replace the word
A red markup line will appear...

4 Click on either of the red markup lines to display all the tracked changes
Notice the red markup line is now grey as by clicking on the red markup line you have switched to **All Markup** view...

5 Click on either of the grey markup lines, as shown, to return to **Simple Markup** view

Energy and Business

There are a number of strategies that businesses can adopt to work towards reduced energy emissions. For example, by preparing an **Energy Management Policy**, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on:

2

Energy & Business

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3

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Ivana Robinson
Formatted: Font: Bold

4

Energy & Business

There are a number of strategies that businesses can adopt to work towards reduced energy emissions. For example, by preparing an **Energy Management Policy**, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on:

5

For Your Reference...

To **switch between Simple Markup and All Markup** view:

- Click on the markup line in the left margin

Handy to Know...

- A red markup line may not appear for every change you make. For instance only one markup line will appear for changes made in the same sentence.

USING COMMENTS IN TRACKED CHANGES

Comments are very useful when using tracked changes as they can help to clarify the reasons behind any editing or revisions for the sake of all authors of the document. You can also quickly

and easily reply to comments within the document, making the co-authoring process much more efficient.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Tracking Changes_3.docx...*

1 Click on the **Review** tab and ensure **Track Changes** is enabled

2 Select the text **air conditioning** in the first sentence under the heading **Air Conditioning** and click on **New Comment** in the **Comments** group to insert a comment

3 Type **air-conditioning?** as shown, then click on **Close** to close the comment box

Notice the comment icon in the markup area remains to signify that this paragraph has a comment attached...

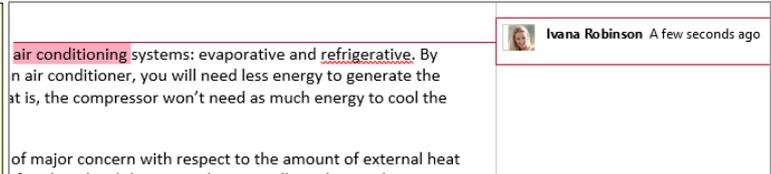
4 Click on **Show Comments** in the **Comments** group to hide the comment in the markup area

5 Click on a red markup line to display the revisions in **All Markup** view

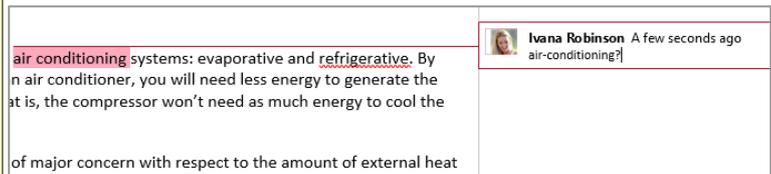
Notice the comment appears in the markup area with the relevant text highlighted in the document...

6 Repeat step 6 to hide the comment again, then click on the comment icon to display the comment in the comment pane

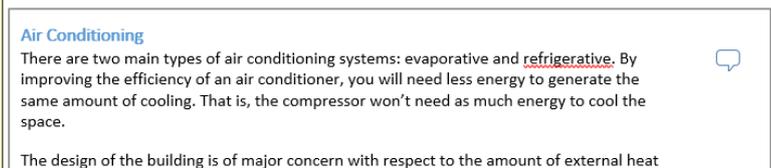
7 Click on **Close** to close the comment pane



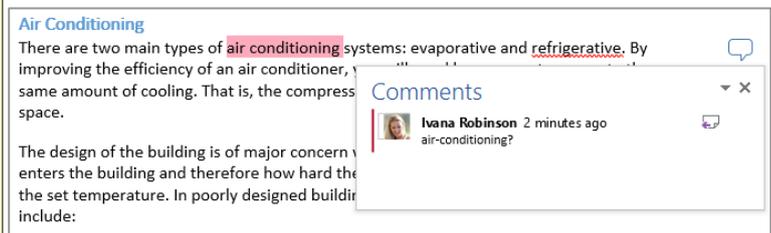
2



3



4



6

*Tip: To delete a comment, click on the **Review** tab, select the comment and either click on **Delete** in the **Comments** group or click on **Reject** in the **Changes** group.*

For Your Reference...

To **show** and **hide** comments:

1. On the **Review** tab, ensure **Track Changes** is enabled and **Simple Markup** view is on
2. Click on **Show Comments** in the **Comments** group

Handy to Know...

- Note that comments will not appear in **No Markup** or **Original Markup** views.
- Pointing to the highlighted text within a document that has a comment attached allows you to view a message that tells you the content, author, date and time of the comment.

SHOWING AND HIDING MARKUP

There are several types of revision that you can apply to a document and when **Track Changes** is enabled, these revisions are flagged with markup. These types of revision include

insertions, deletions and formatting changes. Word enables you to specify what revisions you want to show, thereby customising the level of detail on the screen.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Tracking Changes_4.docx...*

1

Click on the **Review** tab, ensure **Track Changes** is enabled in the **Tracking** group and **All Markup** is selected in the **Display for Review** drop menu

2

On the **Review** tab, click on **Show Markup** in the **Tracking** group to display a menu of options

Notice that all revision types are ticked meaning the markup for these revisions will appear in the document...

3

Click on **Comments** so it appears *unticked*

The comment will be removed...

4

Repeat steps **2** and **3** and click on **Insertions and Deletions** so it appears *unticked*

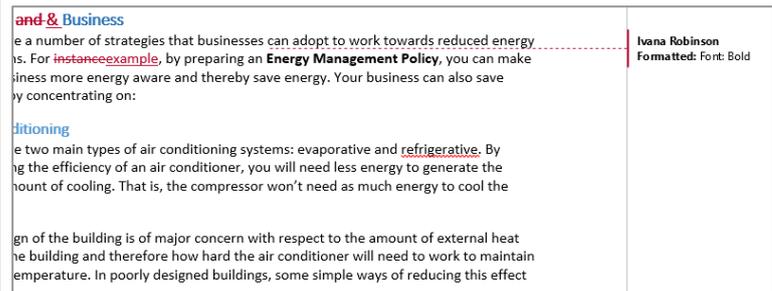
*The only markup remaining is for the formatting of the text **Energy Management Policy**...*

5

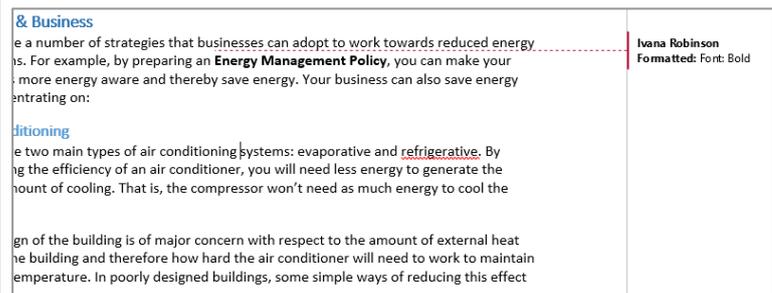
Repeat steps **2** and **3** to ensure all types of revision are ticked so that the markup for them displays in the document



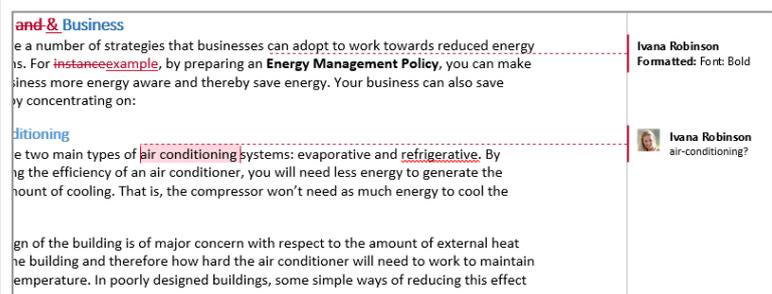
1



3



4



5

For Your Reference...

To **display specific types of markup**:

1. Click on the **Review** tab
2. Click on **Show Markup** in the **Tracking** group and select an option
3. Repeat the above steps to toggle the markup type on and off

Handy to Know...

- You can choose to display only revisions by certain authors. Simply click on **Review > Show Markup > Specific People** to display a list of authors of the document. Click on a name so it appears *ticked* or *unticked* depending on whether you want to see revisions by this person or not.

SHOWING REVISIONS INLINE AND IN BALLOONS

There are two ways that you can **show revisions**: you can display them **inline** or **in balloons**. A balloon is a small box that is displayed in the markup area beside the right

margin, with a line connecting it to the revised text. The balloon will only appear when you point to the markup or click on it.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Tracking Changes_5.docx...*

- 1 Click on the **Review** tab, ensure **Track Changes** is enabled in the **Tracking** group and **All Markup** is selected in the **Display for Review** drop menu

Notice where you have replaced a word – such as ‘instance’ with ‘example’, the original word is crossed out in the text with the new word beside it whereas formatting changes and comments have a balloon attached in the markup area...

- 2 Click on **Show Markup** in the **Tracking** group

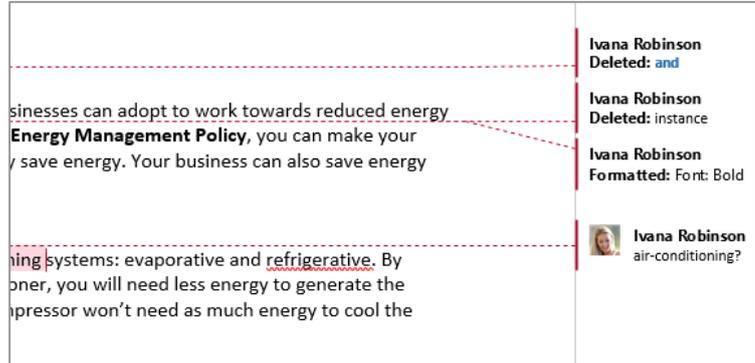
- 3 Point to **Balloons** and select **Show Revisions in Balloons**

All tracked changes now have a balloon attached that displays details of the change

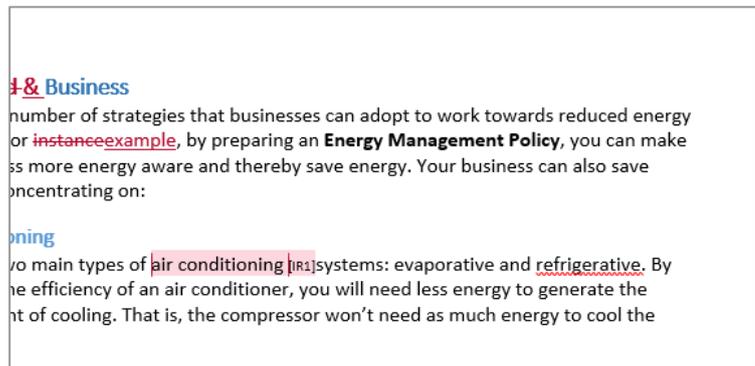
- 4 Repeat steps 2 and 3 to select **Show All Revisions Inline**

All tracked changes now appear in the text with the original text...

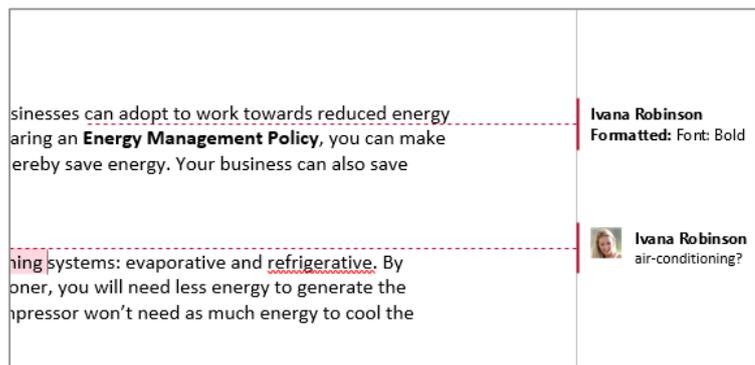
- 5 Repeat steps 4 to select **Show only Comments and Formatting in Balloons** again



3



4



5

For Your Reference...

To **show revisions** in **balloons** or **inline**:

1. Click on the **Review** tab, then click on the drop arrow for **Show Markup** in the **Tracking** group
2. Select **Balloons > Show Revisions in Balloons**, or **Balloons > Show Revisions Inline**

Handy to Know...

- When you select to use balloons for tracking revisions, not all revisions will appear in balloons. For instance if you enable **Track Changes** and you make a change to already edited text, the markup will not appear in a balloon.

ADVANCED TRACKING OPTIONS

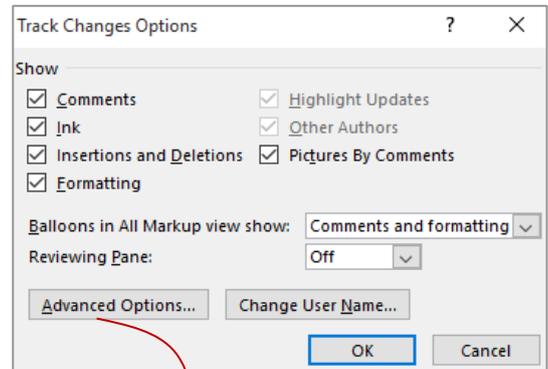
Word provides a range of tracking options that you can apply to customise the way you work when tracking changes. For example, you might prefer that both inserted and deleted text appears

underlined. Or, you might be required to use pink instead of red to highlight changes. You can even specify the size of balloon-style revisions.

Track Changes Options Dialog Box

To display the Track Changes dialog box, click on the **Review** tab, then click on the dialog box launcher in the **Tracking** group.

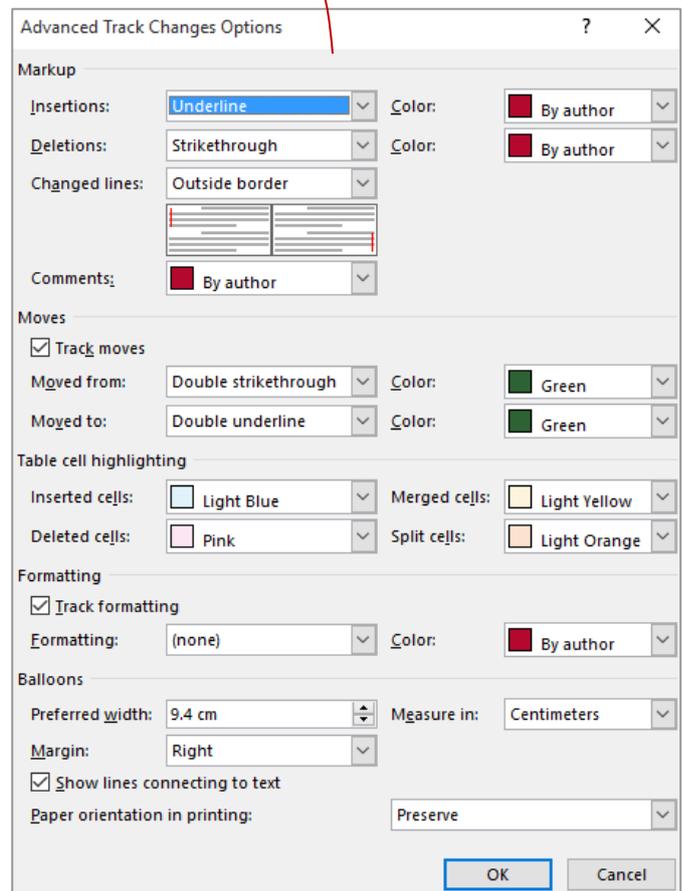
The Track Changes dialog box contains options for showing specific types of revision, the content that balloons should display when in All Markup view and options for changing your user name and the way the **Reviewing Pane** displays. From this dialog box you can also open the **Advanced Track Changes Options** dialog box by clicking on **Advanced Options**.



Advanced Track Changes Options Dialog Box

The **Advanced Track Changes** dialog box contains options for how tracked changes will appear in your document. Using this dialog box you can customise almost every aspect of tracked changes appearance.

By default, a different colour is allocated to each individual author of the document so that you can tell which edits have been added by whom but using this dialog box you can change how different types of markup appear (such as insertions and deletions).



ACCEPTING AND REJECTING CHANGES

One obvious benefit of tracking changes is that you can browse the revisions and choose to either **accept or reject those changes**. Once a revision is accepted, it is incorporated into the

text and revision marks are removed. When a change is rejected, the original text is restored and any revisions are removed. These changes become permanent once the document is saved.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *Tracking Changes_6.docx...*

- 1 Click on the **Review** tab, ensure that **Track Changes** is enabled and that **All Markup** view is selected in the **Display for Review** drop menu
- 2 Click on the revised text **and** – located in the heading
This indicates the revision you want to accept or reject...
- 3 Click on the top half of **Reject** in the **Changes** group
Word will reject the change by reinstating the original text, and moving to the next change...
- 4 Repeat step 3 to delete the **&** and move to the next revision
- 5 Click on **Accept** in the **Changes** group three times to accept the other changes
The next tracked change is a comment...
- 6 Ensure the comment is selected, then repeat step 3
A message will appear informing you there are no longer any comments or tracked changes in your document...
- 7 Click on **[OK]**, then save and close the document

Energy and & Business

There are a number of strategies that businesses can adopt to work towards reduced energy emissions. For ~~instance~~example, by preparing an **Energy Management Policy**, you can make your business more energy aware and thereby save energy. Your business can also save energy by concentrating on:

2

Energy and & Business

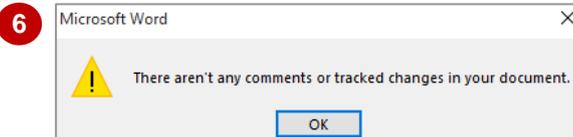
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Energy and Business

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5



For Your Reference...

To **accept or reject revisions**:

1. Click on the revision, then click on the **Review** tab
2. Click on **Accept** or **Reject** in the **Changes** group

Handy to Know...

- Right-click on a revision to display a shortcut menu and select to **Accept** or **Reject** the change.
- Click on the bottom half of either **Accept** or **Reject** in the **Changes** group and select **Accept all changes** or **Reject all changes** to accept/reject all changes in the document.

NOTES:



CHAPTER 4 **COMPARING DOCUMENTS**

InFocus

When working in collaboration with others to prepare a document, it is important that you have the ability to compare different copies of that document. In this way you can select the edits you want to retain and those that you want to discard, resulting in the final publication.

In this session you will:

- ✓ gain an understanding of document comparisons
- ✓ learn how to select documents to compare
- ✓ learn how to accept and reject changes
- ✓ learn how to save the compared document.

UNDERSTANDING DOCUMENT COMPARISONS

Often the creation of a single document relies on the collaboration of several people. As a result of this group effort, it is not unusual for multiple copies of that document to exist. To generate a

single, final version it may be necessary to combine the changes from each copy and this can be achieved using Microsoft Word's **Compare** functionality.

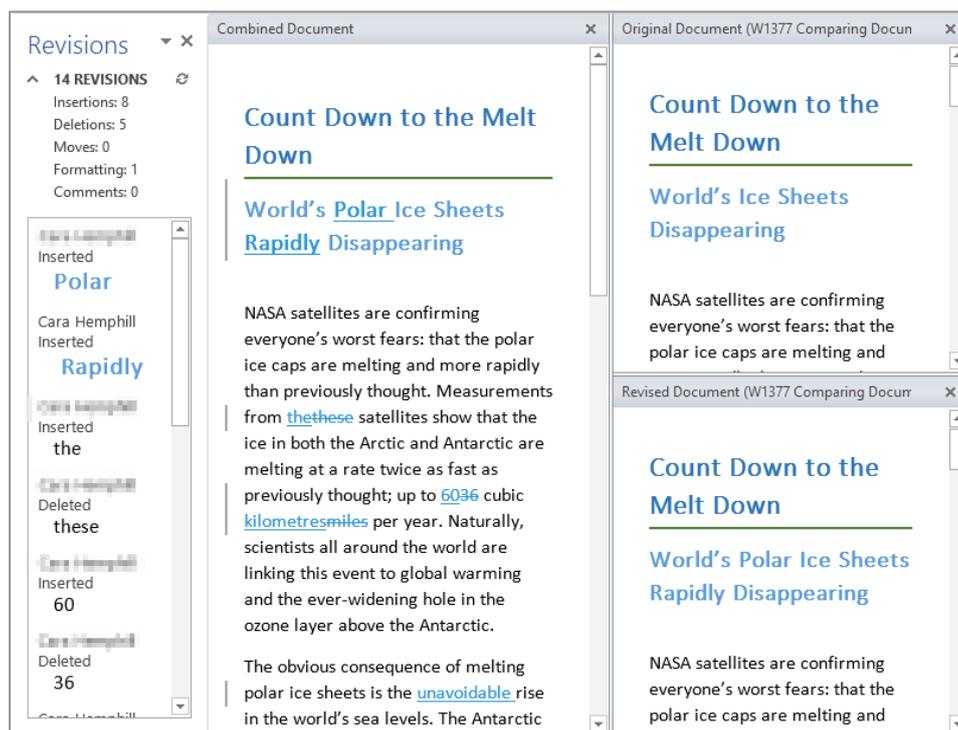
When collaborating on a document, multiple versions of the document may exist as different people create copies to work on. To amalgamate multiple versions into a single final document, you could open the documents simultaneously and then arrange them on the screen to enable you to manually cut and paste between them – but imagine how messy and confusing this could be...

Alternatively, you can use Word's **Compare** tool to draw the documents together and automatically highlight the text that has changed through the use of revision marks. By selecting an original copy of the document and a revised copy, Word is then able to compare the two and combine the information.

The **Compare** tool in Microsoft Word offers two options: **Compare** and **Combine**. The choice of whether to compare your documents or to combine them lies in the use of revision marks and the number of documents being considered.

To Compare or Combine – that is the question...

Comparing documents, also called **legal blacklining**, is best used when the original and revised documents do not contain tracked changes. The reason is that in the combined document, Word will automatically accept the changes made in the nominated “original” document and then display the changes in the comparison document as a set of revisions belonging to a single author.



Combining documents enables you to compare the revisions from multiple authors and across two or more documents (although you need to repeat the **Combine** command, as you can only compare two documents at any one time).

SELECTING DOCUMENTS TO COMPARE

When documents are worked on by more than one person, different copies are often generated. Prior to final publication of the document, it is useful to compare the changes made in the

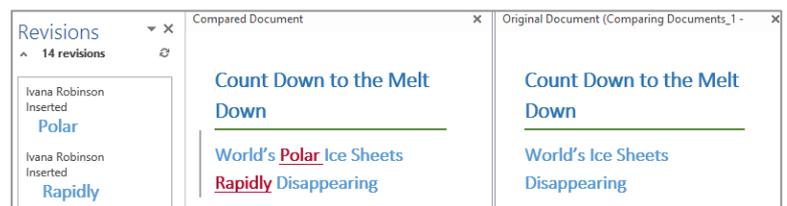
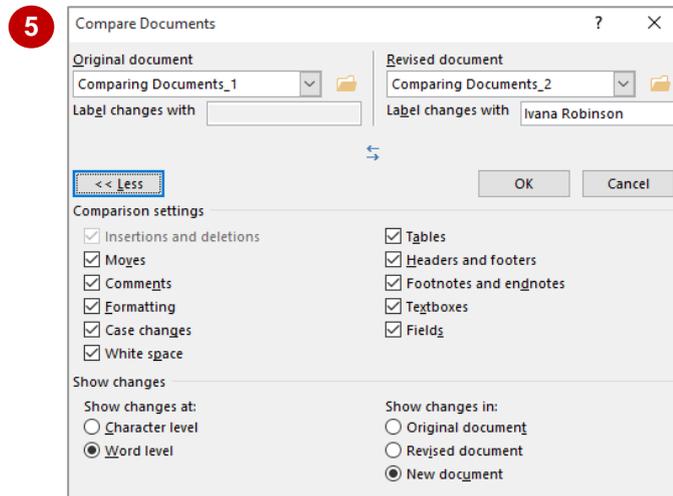
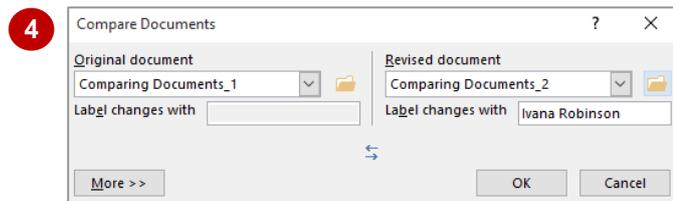
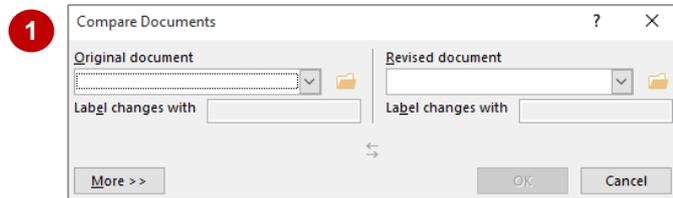
different versions and then accept or reject those changes. To enable **Word** to draw together the differences into a new document, you will first need to select the documents to compare.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Comparing Documents_1.docx*...

- 1 Click on the **Review** tab, then click on **Compare** in the **Compare** group and select **Compare** to open the **Compare Documents** dialog box
- 2 Click on **Browse** for **Original document** to display the **Open** dialog box
Let's locate the original version of the document...
- 3 Navigate to the course files folder, then click on **Comparing Documents_1.docx** and click on **[Open]**
Let's select the document to compare this with...
- 4 Click on **Browse** for **Revised document**, then repeat step 3 to open **Comparing Documents_2.docx**
- 5 Click on **[More]** and ensure the settings are as shown
- 6 Click on **[OK]** to compare the changes in a new document
Word will create a comparison document, highlighting the differences between the original and revised documents.
Leave the document open for the next exercise



6

For Your Reference...

To **select documents** to **compare**:

1. Click on the **Review** tab
2. Click on **Compare** in the **Compare** group and select **Compare**
3. Select the **Original** and **Revised documents**, then click on **[OK]**

Handy to Know...

- If you mix up the original and revised versions of the document, click on **Swap Documents** in the **Compare Documents** dialog box to swap them.
- If you prefer to **combine** two documents, click on **Compare** and select **Combine**.

ACCEPTING AND REJECTING CHANGES

Once you have selected two versions of a document to compare (or combine), Word creates a comparison document that includes revision marks to highlight the differences

between the two documents. You can then move through the document and **accept or reject** each compared revision.

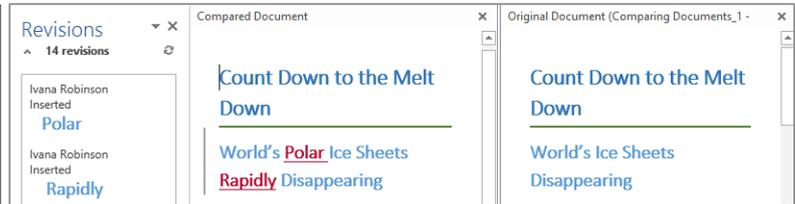
Try This Yourself:

Same File

Continue using the previous files with this exercise...

- 1 Press **Ctrl** + **Home** to move to the top of the document
- 2 Click on the **Review** tab, click on **Compare** in the **Compare** group, point to **Show Source Documents**, then select **Hide Source Documents**
- 3 On the **Review** tab, click on **Next** in the **Changes** group to move to the first revision
- 4 Click on the top half of **Accept** in the **Changes** group to accept this revision and move to the next one
- 5 Repeat step 4 to accept the next revision
- 6 Click on the top half of **Reject** in the **Changes** group to reject this revision and move to the next one
- 7 Repeat step 6 to reject the next revision, then accept all remaining revisions and click on **[OK]**

Leave this document open for the next exercise



For Your Reference...

To **accept or reject changes**:

1. Click on the **Review** tab
2. Click on the top half of **Accept** or **Reject** in the **Changes** group to accept or reject the selected revision and to move to the next one

Handy to Know...

- To accept or reject all changes in the document, click on the bottom half of **Accept** in the **Changes** group and select **Accept All Changes in Document**, or click on the bottom half of **Reject** in the **Changes** group and select **Reject All Changes in Document**.

SAVING THE REVISED DOCUMENT

When selecting documents to compare, one of the options in the **Compare Documents** dialog box is to choose where you want the changes to be shown; either in the original document, the

revised document, or in a new document (*compared document*). By selecting this option, you create a new, final document that you will need to **save** once you have finished revising.

Try This Yourself:

Same File

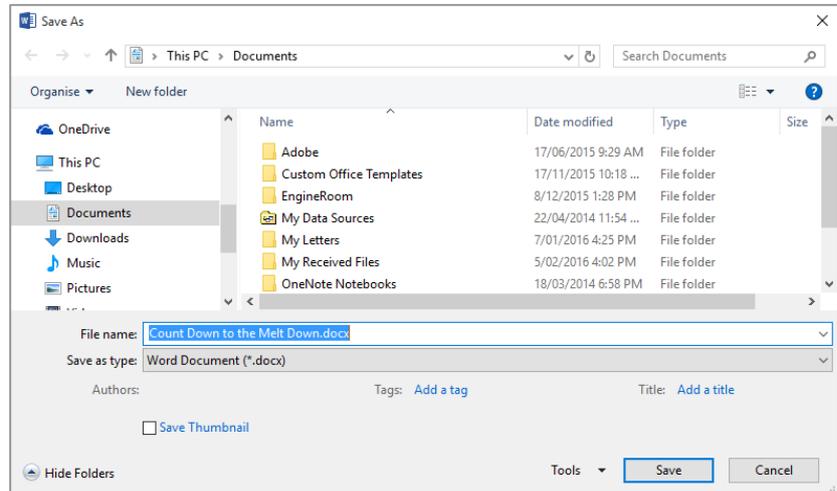
Continue using the previous file with this exercise, or open the file *Comparing Documents_1.docx...*

- 1 Click on the **File** tab, click on **Save**, click on **This PC** in the middle pane then click on **[Browse]** to open the **Save As** dialog box

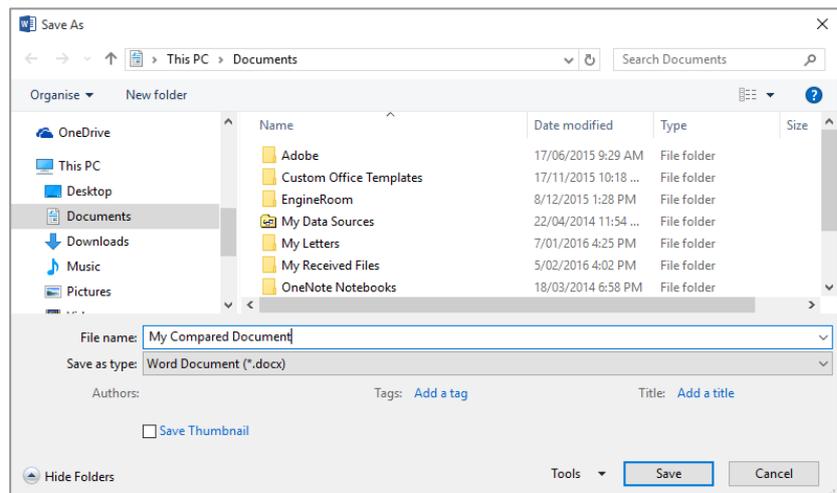
Notice that Word will attempt to suggest a name for the document based on the first line of text...

- 2 Type **My Compared Document** in **File name**
- 3 Locate and open the course files folder, then click on **[Save]** to save the document

The new name will appear in the title bar at the top of the Word window



1



2

For Your Reference...

To **save** the *compared document*:

1. Click on the **File** tab and select **Save**
2. Type a **File name**
3. Navigate to the save location
4. Click on **[Save]**

Handy to Know...

- When comparing documents, if you choose to show the changes in either the original or the revised document, you will still need to save the changes once you have accepted or rejected the revisions.

NOTES:



CHAPTER 5 PROTECTING DOCUMENTS

InFocus

If you distribute or transmit important documents regularly to others for review, for example, you should consider **protecting** them. To protect a document means to apply settings that restrict or prevent other users from formatting or editing your document, or sections of a document. Microsoft Word provides several functions for protecting your documents.

In this session you will:

- ✓ gain an understanding of document protection
- ✓ learn how to make a document read-only
- ✓ learn how to open and work with a read-only document
- ✓ learn how to restrict the formatting in a document
- ✓ learn how to work with formatting restrictions
- ✓ learn how to restrict editing in a document
- ✓ learn how to specify exceptions to editing and formatting restrictions
- ✓ learn how to remove document protection
- ✓ learn how to apply an open document password
- ✓ learn how to apply a modify document password.

UNDERSTANDING DOCUMENT PROTECTION

To protect a document means to restrict or prevent other users from editing your important work. When a document is protected, other users can read the document but cannot make changes

to the document unless they have been given permission. If you want to make sure that your work cannot be edited or changed in any way, then document protection might be just the thing!

How Does Document Protection Work?

There are several ways to protect your document. You can save a document as **read-only recommended**. When users open a read-only document, they will receive a message asking how they would like to open that document. Users can open the document as read-only and if they make changes to the document they will need to save it with a different file name (or in a different location), otherwise they can simply open the document to view. Or, users can open and work with the document as normal.

You can also apply **password protection** to a document. There are several ways to do this, such as clicking on **[Tools]** in the **Save As** dialog box and entering a password.

You can also work with the various document protection controls on the **Restrict Editing** pane.

The Restrict Editing Pane

The **Restrict Editing** pane (see picture) allows you to:

1. Apply Formatting Restrictions

When you enforce this type of document protection, you will prevent your users from being able to apply any type of manual formatting (such as applying bold or italics, or changing the text font). Users can also be prevented from modifying the styles in any way.

2. Apply Editing Restrictions

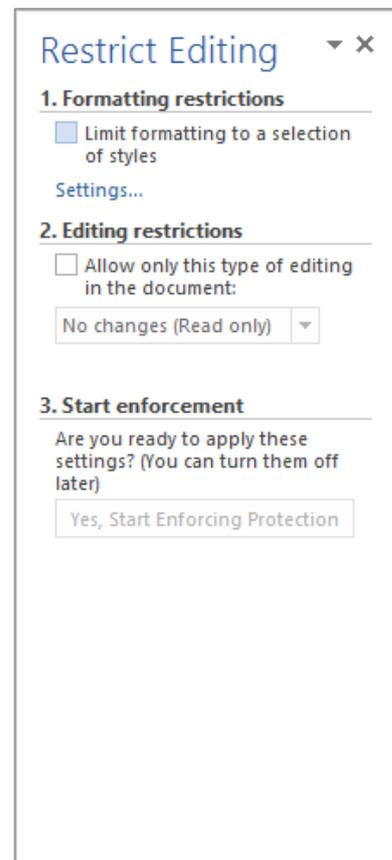
Allows you to specify the type of editing that can occur, what part of the document can be edited, as well as who can make changes to the document. For example, using the **Editing restrictions** option, you can:

- Make particular parts of a document (or the entire document) read-only. You can also grant permission for specific users to change the unrestricted parts of a document.
- Allow users to edit a document with tracked changes turned on. They can also insert comments into the document with this option.
- Allow users to insert comments into a document.
- Allow users to fill in a form in a document.

3. Start Enforcement

Assign a password if you like, when you start enforcing the protection. Assigning a password at this point will ensure that only users who know the password can remove the protection that you have set for the document.

Conversely, if you choose not to use a password, be aware that all users can very easily change or remove the document protection as long as they know how to display the **Restrict Editing** pane.



MAKING A DOCUMENT READ-ONLY

If you use a particular document or template as a basis for creating other documents, you can ensure that inadvertent changes are not made to the document by making it **read-only**

recommended. When you save a document as read-only, users who open that document will receive a message asking how they want to open and work with the document.

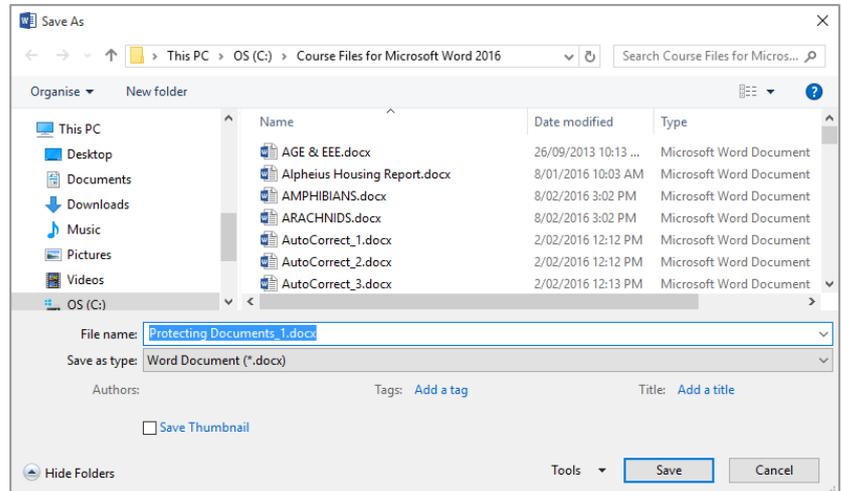
Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Protecting Documents_1.docx...*

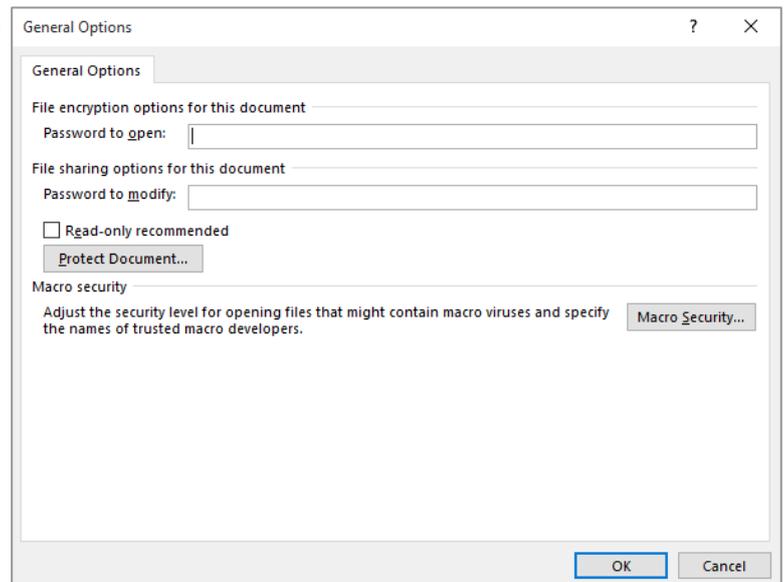
- 1 Click on the **File** tab, click on **Save As**, select **This PC** in the middle pane and click on **Browse** to open the **Save As** dialog box
- 2 Type **My Read Only File** in **File name**, then navigate to the course files folder
- 3 Click on **[Tools]** to the left of **[Save]** in the bottom right corner and select **General Options** to open the **General Options** dialog box
- 4 Click on **Read-only recommended** so it appears with a tick, then click on **[OK]** and on **[Save]**

This will save the document as read-only recommended. Although the name of the document has changed in the title bar, there really is no other change to the document, and the only way to tell whether the document is read-only is to close and then re-open it



2

3



For Your Reference...

To **make** a **document read-only**:

1. Click on the **File** tab and select **Save As**
2. Type a **File name**
3. Click on **[Tools]** and select **General Options**
4. Tick **Read-only recommended**, click on **[OK]**, then click on **[Save]**

Handy to Know...

- You can make a document **read-only** in the **Restrict Formatting and Editing** task pane. To do this, click on the **Review** tab, click on **Restrict Editing** and click on **Allow only this type of editing in the document** under **Editing restrictions**. Click on **[Yes, Start Enforcing Protection]**.

WORKING WITH A READ-ONLY DOCUMENT

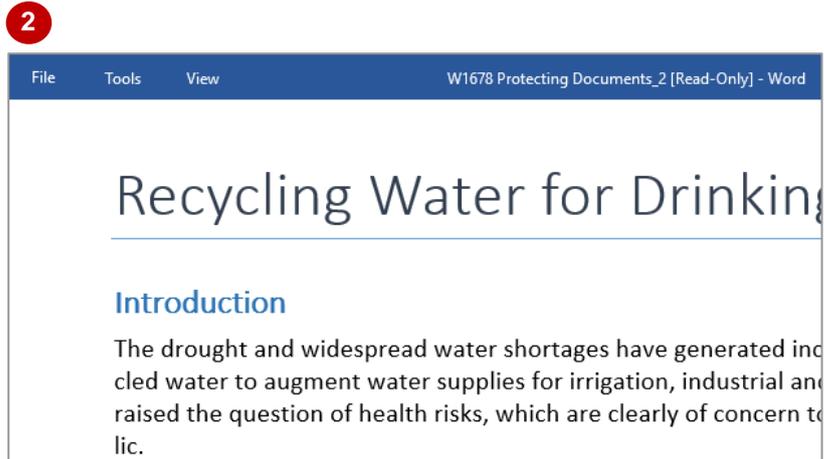
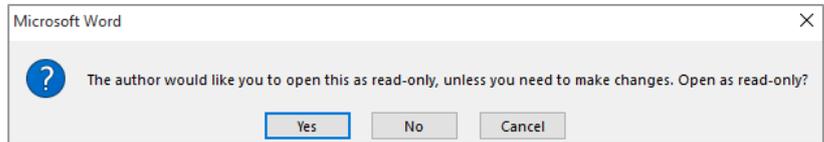
When you attempt to open a **read-only recommended** document, you are given a choice of how to open the document. The default option is to open it as a read-only document. In

this situation, if you change the document you must save the changes to a new document. Or, you can open the document as normal where you can save changes to the original document.

Try This Yourself:

Ensure Word is active and no documents are open...

- 1 Click on the **File** tab, click on **Open**, click on **Computer** in the middle pane then click on **[Browse]** to display the **Open** dialog box
- 2 Navigate to the course files folder and double-click on **Protecting Documents_2.docx** to open it
A message box is displayed, asking how you want to open the document...
- 3 Click on **[Yes]** to open the document in read-only mode
[Read-Only] will appear after the file name in the title bar and the document opens in Read mode by default....
- 4 Double-click on the subheading **Introduction** and press **Del**
Notice nothing happens...
- 5 Click on the **File** tab
A message box indicates that this file is read-only, so any changes must be saved to a new document



- 3 *If you were to click on [No] when the message appears asking if you want to open the document in Read mode then you would be able to make and save changes to the original document.*



- 5 *If you were to display the Save As dialog box and click on [Save], a message would appear informing you that because the document is Read Only, you must save the document with a different name or to a different location.*

For Your Reference...

To **open** a **read-only document**:

1. Click on the **File** tab and select **Open**
2. Locate and double-click on the desired file
3. Click on **[Yes]** to open the document as a read-only document

Handy to Know...

- When you save a read-only recommended document as a new document, unless you remove the tick from **Read-only recommended** in the **General Options** (via **[Tools]** in the **Save As** dialog box) the new document will also be saved as a read-only recommended document.

RESTRICTING FORMATTING

When you open a document, by default all styles are available for use and can be modified as required. But if you have a document that you want to distribute to others – say, for review

purposes – and you don't want them to change the look of your document, you can restrict and even prevent totally, their ability to make any **formatting changes** to the document.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *Protecting Documents_3.docx...*

1 Click on the **Review** tab, then click on **Restrict Editing** in the **Protect** group to open the **Restrict Editing** pane

2 Click in the check box for **Limit formatting to a selection of styles** so it appears ticked, then click on **Settings** to open the **Formatting Restrictions** dialog box

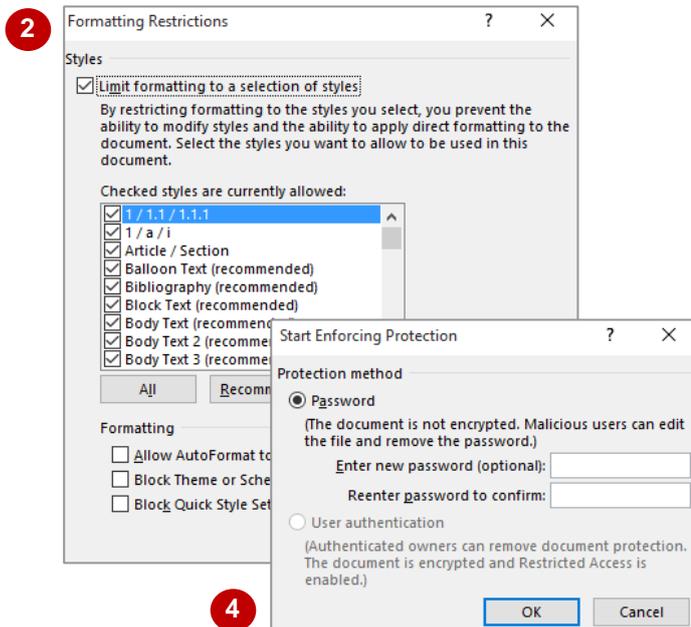
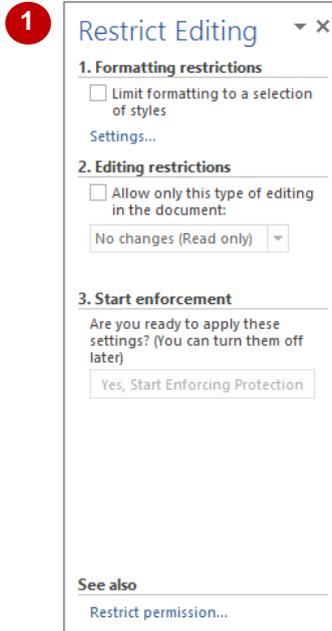
3 Click on **[None]**, then scroll down and click on the check boxes for **Heading 1, (recommended)** and **Title (recommended)** until they appear with a tick, then click on **[OK]**

A message box will appear...

4 Click on **[Yes]** to close the message box, then click on **[Yes, Start Enforcing Protection]** to display the **Start Enforcing Protection** dialog box

5 Click on **[OK]** to close the dialog box without specifying a password, then save the document

Now users can only use the selected styles to format



For Your Reference...

To **restrict formatting** in a **document**:

1. On the **Review** tab, click on **Restrict Editing**
2. Tick **Limit formatting to a selection of styles** and click on **Settings**, then select the styles and click on **[OK]**
3. Click on **[Yes, Start Enforcing Protection]**

Handy to Know...

- When you restrict formatting to selected styles, you prevent users from being able to modify the selected styles and from being able to apply any direct formatting (such as bold and italics) to the document.

WORKING WITH FORMATTING RESTRICTIONS

If you open a document that has **formatting restrictions applied**, you can only change the look of the document by applying the allowed (selected) styles to the text. You will not even be

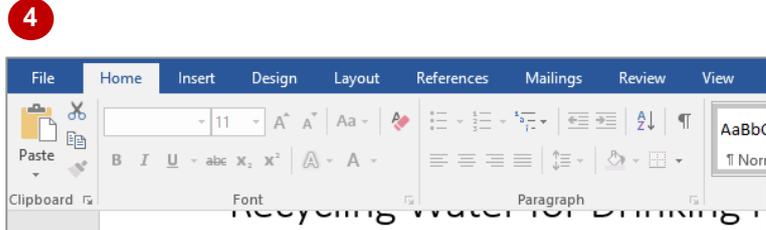
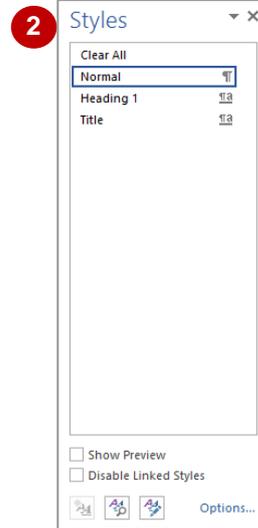
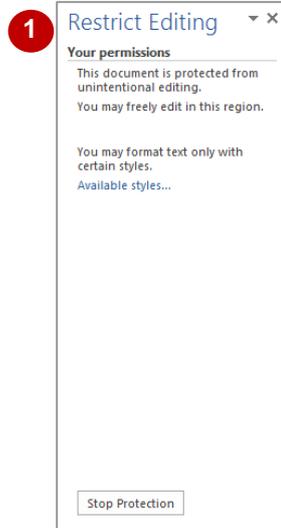
able to apply any kind of text formatting, such as changing the text colour or font. And if no styles have been made available in a document, you cannot change the look of the document at all.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Protecting Documents_4.docx...*

- 1 Ensure that the **Restrict Editing** pane is displayed
- 2 Click on **Available styles** in the pane to open the **Styles** pane
Only four styles are available for use in this document...
- 3 Click in the heading **Recycling Water for Drinking Purposes**, then click on **Title** in the **Styles** dialog box to apply this style
- 4 Click in the subheading **Introduction**, then click on **Heading 1** in the **Styles** dialog box to apply this style
- 5 Repeat step 4 to apply the **Heading 1** style to the five remaining subheadings
Let's try to format some text...
- 6 In the second paragraph, select the text **Safe Drinking Water Quality Management Framework**, then click on the **Home** tab
None of the formatting commands are available



For Your Reference...

To **work with formatting restrictions**:

1. Open the **Restrict Formatting and Editing** task pane
2. Click on **Available styles**
3. Click in the paragraph to be formatted and click on the desired styles

Handy to Know...

- The styles that are available for the document will also appear in the **Styles** gallery on the **Home** tab.
- If you right-click on selected text in this document, you will notice that the **Font**, **Paragraph**, **Bullets** and **Numbering** menu options are not available.

RESTRICTING EDITING

You can **restrict editing** of a document by selecting parts of the document that can be edited, such as text blocks, particular headings, sentences or even words. For example, you can

specify the areas that can be edited and restrict other areas, you can allow editing with all changes tracked, or you can allow only comments to be inserted into the document, and so on.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Protecting Documents_5.docx...*

- 1 Ensure that the **Restrict Editing** pane is displayed and click on **[Stop Protection]**
- 2 Select the three paragraphs of text below **Introduction**, then click in the check box for **Allow only this type of editing in the document**
- 3 Ensure that **No changes (Read only)** is selected in **2. Editing restrictions**, then click in the check box for **Everyone** and click away from the text to deselect it
- 4 Repeat steps 2 and 3 for the paragraphs under the next three headings
- 5 Click on **[Yes, Start Enforcing Protection]**
- 6 Click on **[OK]** to close the dialog box without setting a password
- 7 Double-click on **Introduction** and press **Del**

The text will be highlighted in grey and sits between square brackets...

You can now only edit the yellow highlighted text...

Nothing will happen as only the yellow areas of the document are editable

2 **Restrict Editing** [Close]

1. Formatting restrictions

Limit formatting to a selection of styles

Settings...

2. Editing restrictions

Allow only this type of editing in the document:

No changes (Read only) [Dropdown]

Exceptions (optional)

Select parts of the document and choose users who are allowed to freely edit them.

Groups:

Everyone

More users...

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Yes, Start Enforcing Protection

See also [Dropdown]

Introduction

[The drought and widespread water shortages have generated increasing interest in using recycled water to augment water supplies for irrigation, industrial and drinking uses. This has raised the question of health risks, which are clearly of concern to many members of the public.

The industry manages the public health risks associated with providing safe drinking water by the application of the Safe Drinking Water Quality Management Framework in the International Health & Medical Research Council (IHMRC) guidelines for safe drinking water. This risk management approach should also be applied to the risks associated with recycled water.

The Alpheus Global Enterprises Research Centre for Water Quality and Treatment has the experience and skills to assist the IHMRC in developing a similar framework for managing and monitoring the risks associated with delivering recycled water that is safe for the purpose for which it is intended. Recycled water can be used in a number of ways as discussed below]

3

For Your Reference...

To **restrict editing** in a **document**:

1. Open the **Restrict Formatting and Editing** task pane
2. Select the text, tick **Allow only this type of editing in the document**, then select the desired option in **2. Editing restrictions**
3. Click on **[Yes, Start Enforcing Protection]**

Handy to Know...

- If you choose not to apply a password when enforcing protection, all users opening this document can change your restrictions.
- If the text is not highlighted in yellow at step 6, click in the tick box for **Highlight the regions I can edit** in the **Restrict Formatting and Editing** task pane.

MAKING EXCEPTIONS

By default, the group name **Everyone** is listed in **Exceptions** under **Editing restrictions**. This means just as it says: everyone can carry out the editing restrictions that you set for the document.

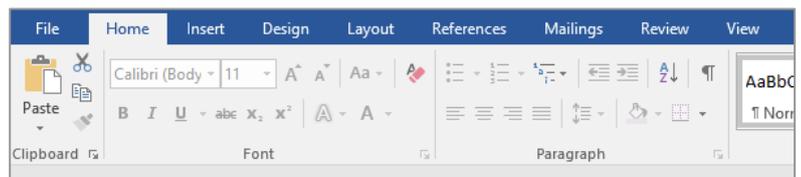
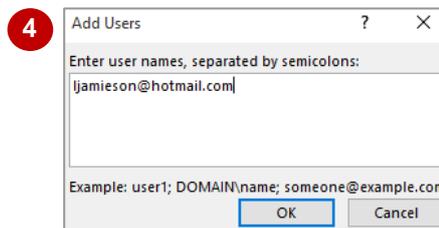
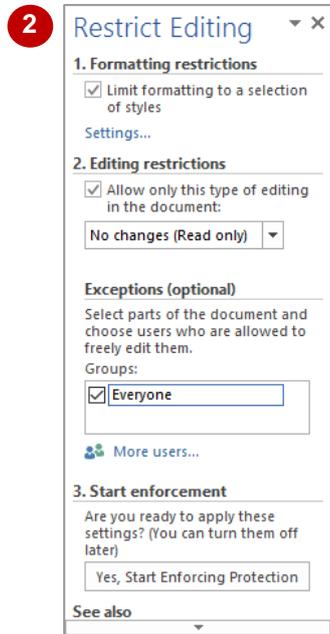
But, if you want only specific users to be able to edit the allowable regions in the document, you can specify them by first adding them to the **Exceptions** list and then selecting them.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Protecting Documents_6.docx...*

- 1 Ensure that the **Restrict Editing** pane is displayed, click on **[Stop Protection]** then select the three text paragraphs under **Introduction**
- 2 Ensure that **Allow only this type of editing in the document** is selected under **2. Editing restrictions** and ensure that **No changes (Read only)** is selected
- 3 Click on **More users** in **Exceptions** to open the **Add Users** dialog box
- 4 Type a valid **User ID** in **user name**
In the example shown, the string used is an email address...
- 5 Click on **[OK]**
The user will be added to the task pane in Individuals...
- 6 Select the new user in **Individuals** so it appears with a tick then click on **[Yes, Start Enforcing Protection]**, and click on **[OK]** to close the **Start Enforcing Protection** dialog box without setting a password
Most tools on the ribbon will now be greyed out for this user as they are not allowed to edit the document



For Your Reference...

To **make exceptions** to **editing restrictions**:

1. Open the **Restrict Formatting and Editing** pane
2. Select the text to allow, tick **Allow only this type of editing in the document**, click on **More users**, and add users as desired
3. Click on **[Yes, Start Enforcing Protection]**

Handy to Know...

- To enter the **User Id** when specifying exceptions, using the format **Domain\user name**, you must identify the correct domain name and User ID on your network for the person(s) you want to allow document editing. To do this, speak to your network or systems administrator.

STOPPING DOCUMENT PROTECTION

If you want to stop protecting a document – perhaps you have received your document back from the reviewer and are ready to edit it – you can do this very simply via the **Restrict Editing**

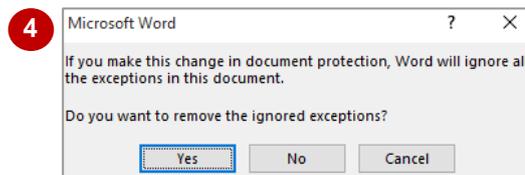
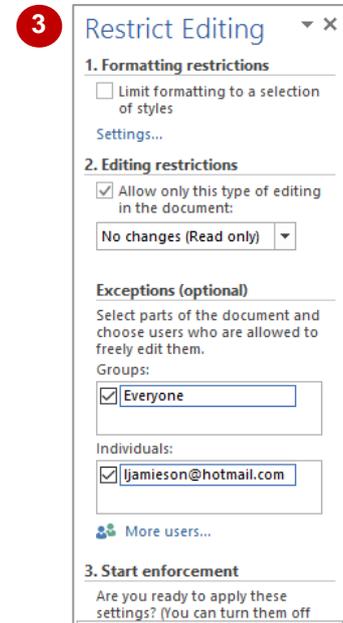
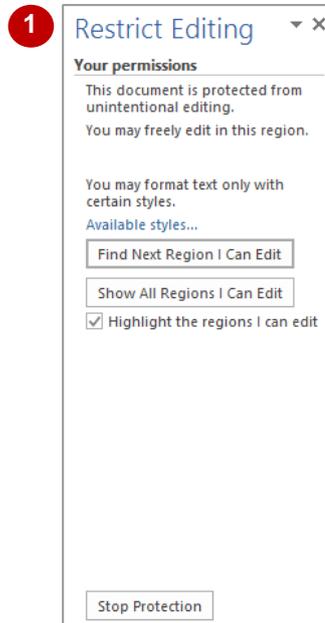
pane. In fact this process is so easy that if a password wasn't set when the data protection was initially applied to the document, anyone can stop the protection.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Protecting Documents_7.docx...*

- 1 Ensure that the **Restrict Editing** pane is displayed
Currently, this document has Editing restrictions and Exceptions applied...
- 2 Click on **[Stop Protection]**
You can now see the protection originally applied...
- 3 Click in the check box for **Limit formatting to a selection of styles** to remove the tick
- 4 Click in the check box for **Allow only this type of editing...** to remove the tick
A message box asks whether or not you want to ignore the editing restriction exceptions that were previously set...
- 5 Click on **[Yes]** to remove the exceptions
All protection will now be removed from this document



For Your Reference...

To **stop document protection**:

1. Open the **Restrict Editing** pane
2. Click on **[Stop Protection]**
3. Remove the ticks from the tick boxes
4. If a message box appears, click on **[Yes]**

Handy to Know...

- If you used a password when setting the original document protection through the **Restrict Editing** pane, you will need to type the password before you can stop enforcing the protection.

APPLYING AN OPEN DOCUMENT PASSWORD

When distributing a document to other users, you may wish to ensure that only certain people can open it. One method for doing this is to password-protect the document. Using the

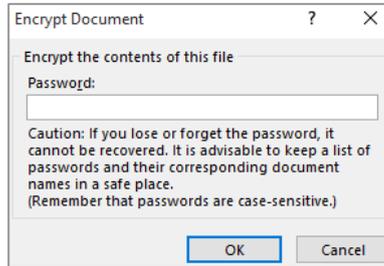
Encrypt with Password command, you can apply an open document password to the document so that only users who know the encryption password can open the file.

Try This Yourself:

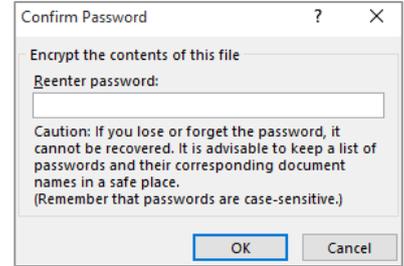
Same File

Continue using the previous file with this exercise, or open the file *Protecting Documents_8.docx*...

- 1 Click on **File** to open the **Backstage**, then click on **[Protect Document]** and select **Encrypt with Password** to display the **Encrypt Document** dialog box
- 2 Type **Open** in **Password**, then click on **[OK]** to display the **Confirm Password** dialog box
Take careful note of what you've just typed, including its case...
- 3 Type **Open** in **Reenter password**, then click on **[OK]**
The Protect Document information is highlighted, indicating that a password is required to open this document...
- 4 Save, close and then re-open this document
The Password dialog box will appear...
- 5 Type **Open** in **Enter password to open file**, then click on **[OK]** to open the document



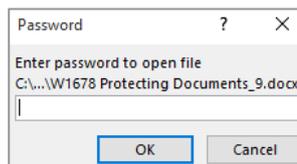
1



2



3



4

For Your Reference...

To **apply** an **open document password**:

1. Click on the **File** tab, then click on **[Protect Document]** and select **Encrypt with Password**
2. Type the **Password** and click on **[OK]**
3. Re-type the **Password** and click on **[OK]**
4. Save the document

Handy to Know...

- Don't forget the password(s) for a document! If you do, you will not be able to open or modify the document as Word doesn't store password information.
- Passwords are case-sensitive so make sure the **Caps Lock** key is turned off when you initially create a password.

APPLYING A MODIFY DOCUMENT PASSWORD

As well as applying an open document password, you can further restrict access to your document by applying a **modify document password**. This means that, for the one document, you can select

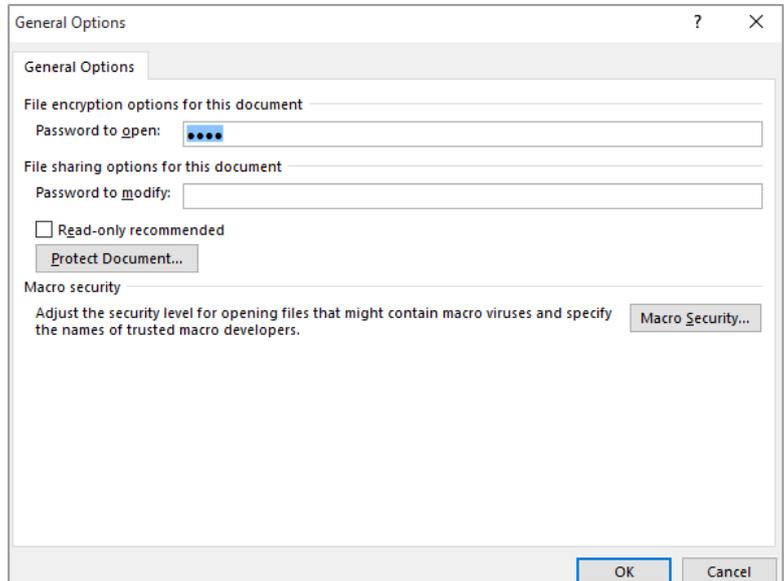
specific people who can modify it by providing them with the modify password, while everyone else who doesn't have access to the password can only open the document as a read-only file.

Try This Yourself:

Same File

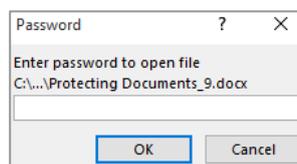
Continue using the previous file with this exercise, or open the file *Protecting Documents_9.docx...*

- 1 Click on the **File** tab, click on **Save As**, then open the **Save As** dialog box
- 2 Click on **[Tools]** (located to the left of **[Save]**) and select **General Options** to open the **General Options** dialog box
The password to open this file is "Open". Let's add another password which will allow the file to be modified...
- 3 Type **Modify** in **Password to modify**, then click on **[OK]** to display the **Confirm Password** dialog box
- 4 Type **Modify** in **Reenter password to modify**, then click on **[OK]** and click on **[Save]**
- 5 Close and then re-open this document
The Password dialog box will appear...
- 6 Type **Open** in **Enter password to open file**, then click on **[OK]**
- 7 Type **Modify** in **Password**, then click on **[OK]** to open the document

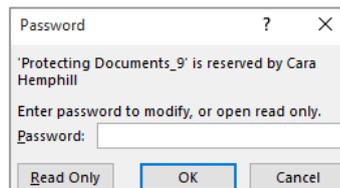


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For Your Reference...

To **apply** a **modify document password**:

1. Click on **File** and select **Save As**
2. Click on **[Tools]** > **General Options**
3. Type the **Password to open** (if desired) and the **Password to modify**, then click on **[OK]**
4. Confirm the password(s)
5. Save the document

Handy to Know...

- When opening a document to which you have applied a **modify document password**, you can open it as a read-only file by clicking on **[Read Only]** or open it with modify rights by entering the **Password** and clicking on **[OK]**.

NOTES:





Congratulations!

You have now completed Microsoft Word 2016 - Collaborating. Microsoft Word 2016 - Collaborating was designed to get you to the point where you can competently perform a variety of operations.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here?

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and books for you to work through.

Hungry for More?

We live in an ever-changing world where we all need to review and upgrade our skills.

If you have received this course book on a training course why not ask the tutor or trainer for other courses that may be of benefit to you. If you are attending a college ask for one of their brochures.

Alternatively, if you've enjoyed using this course book you can find others that cover a wide range of topics at our web site www.watsoniapublishing.com.

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