

Protecting and Sharing Documents

Lesson Skill Matrix

Skill	Exam Objective	Objective
Protecting and Sharing Documents	Restrict editing.	1.2.1
	Mark a document as final.	1.2.2
	Protect a document with a	1.2.3
Managing Document Versions	Manage document versions.	1.1.3

Software Orientation

The Bottom Line

In Word 2016, Backstage provides commands that enable you to sign in to your Microsoft account; protect, inspect, and share documents; and manage versions of your documents as shown in Figure 3-1.

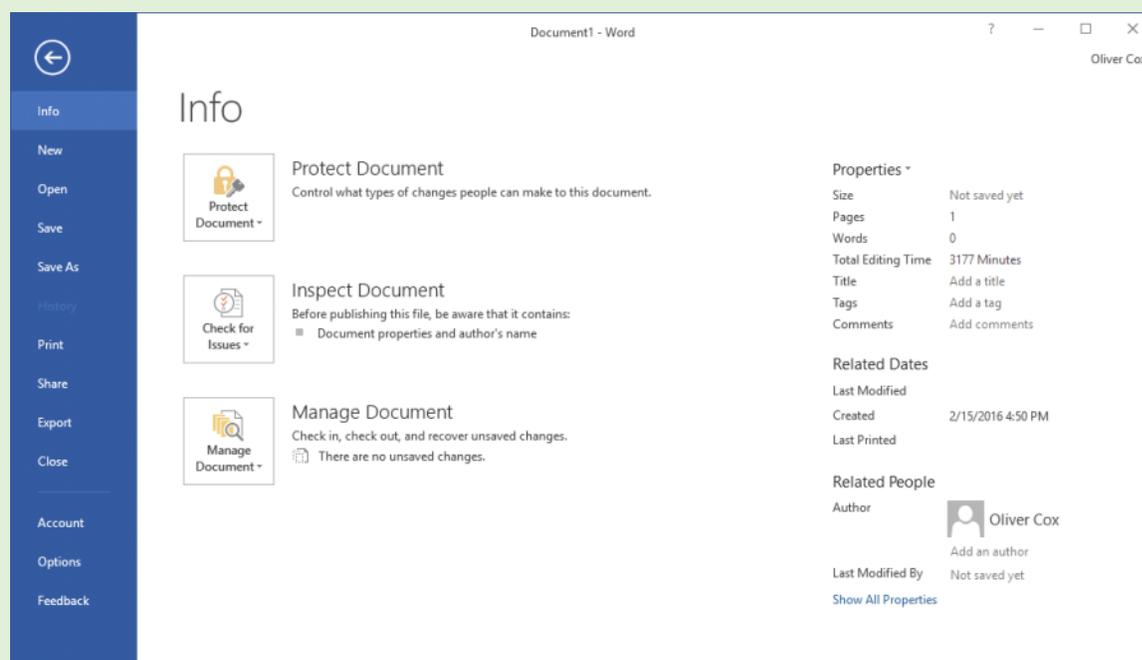


Figure 3-1
Backstage

Use Figure 3-1 as a reference for this lesson.

Protecting and Sharing Documents

Protecting a Document

There might be a time when you need to set a password for sensitive documents. These documents can include payroll, budgets, employee evaluations, or hiring agreements. There are two different options for protecting a document: Save As Tools and Restrict Editing. Documents such as these are meant for certain individuals who have been granted permission; all others are denied access. Those granted access to confidential documents are provided a password to open and modify the document.

When you save a document, you can save it with a password that enables users to open the document as read only. Individuals who receive the document can read the document, but they cannot modify it. If you want certain individuals to be able to edit the document, then a different password is needed for them to open the file in read/write mode. Managing documents with passwords helps you oversee sensitive tasks while maintaining security for the documents. You can also restrict the type of editing that users can perform in a document by using the Restrict Editing command.

Setting an Access Password for a Document

One way to secure confidential material, is to protect a document with read only and read/write passwords. In this exercise, you learn to set and remove encrypted passwords for a document containing an evaluation form.

Step by step Set an Access Password for a Document

GET READY. OPEN the **Peer Review** document from the lesson folder.

1. **SAVE** the document as **Peer Review Draft** in the lesson folder on your flash drive.
2. Click the **File** tab and then click **Save As**.
3. On the Save As screen, click **This PC** and then click **Browse**. The *Save As* dialog box appears.
4. In the *Save As* dialog box, click the **Tools** drop-down arrow.
5. Select **General Options** from the context menu. The *General Options* dialog box appears (see Figure 3-2).
6. In the Password to open text box, type **Pa\$\$w0rd**. Once you enter a password to open and/or modify the document, the file will be encrypted. When a file is encrypted, the data is converted to a code.

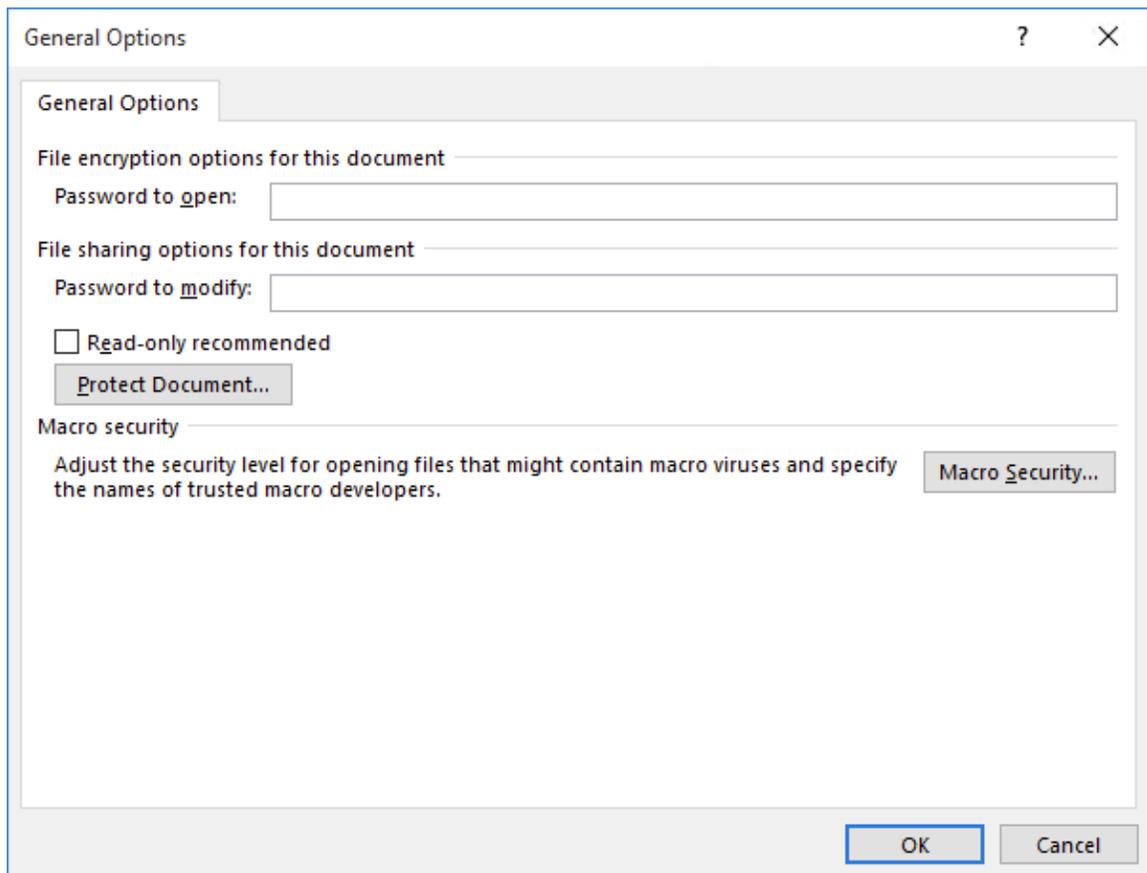


Figure 3-2
General Options dialog box

7. Word enables you to specify two different passwords—one to open a document and one to modify a document—and both are optional. You can specify passwords for both actions—or just specify a different password for each action. Passwords are case-sensitive, which means you can specify upper and/or lowercase letters. For this exercise, use the same password to open and modify the document. In the Password to modify text box, type `Pa$$w0rd`.
8. Click **OK**. The Confirm Password message box appears.
9. In the Reenter password to open text box, type `Pa$$w0rd` and then click **OK**.
10. Another Confirm Password message box appears, this time for the modify password.
11. In the Reenter password to modify text box, type `Pa$$w0rd` and then click **OK**.
12. In the *Save As* dialog box, click **Save** and **CLOSE** the file.
13. Open the **Peer Review Draft** file again. A Password message box appears, prompting you to enter a password to open the document (see Figure 3-3).

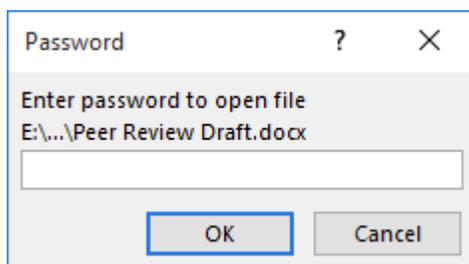


Figure 3-3

Password prompt to open a protected document

14. Type Pa\$\$w0rd in the text box and then click OK. The Password message box appears again.
15. Type Pa\$\$w0rd in the text box and then click OK. The document opens.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Remove a Password

GET READY. USE the Peer Review Draft document that is open from the previous exercise.

1. Click the File tab and notice that the Protect Document button is highlighted in a light yellow color. Under *Protect Document*, it states, "A password is required to open this document."
2. Select Save As and then click the Browse button to open the Save As dialog box.
3. Click the Tools drop-down arrow and then select General Options from the menu.
4. Remove the password protection by selecting each of the hidden passwords in turn and then pressing Delete.
5. Click OK.
6. SAVE the document as Peer Review 1 in your flash drive in the lesson folder.
7. You now have two copies of the same document: one with a password and one without.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note

It is important for you to remember the password you use to protect your documents. If you forget the password, Microsoft cannot retrieve it for you. Record and store your passwords in a safe location, such as a security safe or a secure place at home. Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords do not mix these elements. An example of a strong password is W5! dk8aG; a weak password is CAR381. Passwords should be 8 or more characters in length. A password phrase that uses 14 or more characters is better.

Protecting a Document as Read Only

Safeguarding your documents is one way to protect them from individuals seeking to change the content and format. As you learned, you can encrypt a document with passwords that provide read only or read/write access to the document. Another way to protect a document is to restrict editing. This enables users to open the document without a password, but the types of changes they can make to the document are limited.

For example, you might want to limit formatting changes to specific styles, or you might

want users restricted to adding comments only, filling in forms, or making changes that are tracked. It's your choice as to whom you share the document with and what type of restrictions you put in place. In this exercise, you learn to set a document as read only, limit the document to comments only, and restrict formatting in the document.

Step by step Protect a Document as Read Only

GET READY. USE the **Peer Review 1** document that is open from the previous exercise.

1. **OPEN** Backstage and then click **Protect Document** to display the context menu (see Figure 3-4).

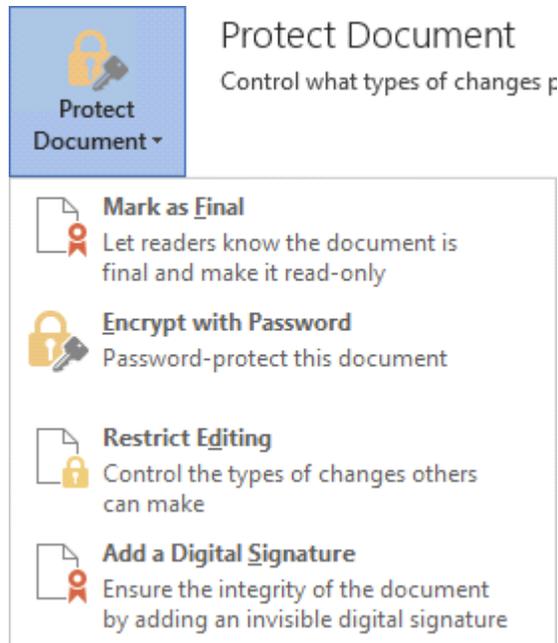


Figure 3-4

Protect Document menu

2. Click **Restrict Editing**. The Restrict Editing pane appears on the right side of the screen (see Figure 3-5). The pane contains three numbered items, as follows:
 - **Formatting restrictions**: Enables you to specify what type of formatting changes are permitted.
 - **Editing restrictions**: Enables you to specify what type of editing changes are permitted.
 - **Start enforcement**: Enables you to apply the settings you have created in the first two items.

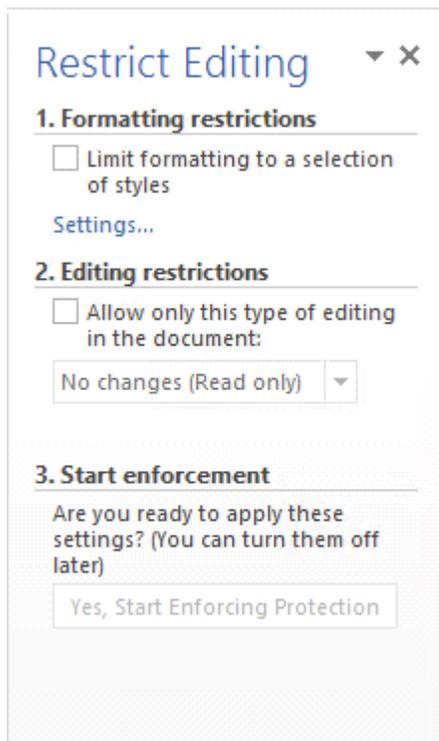


Figure 3-5
Restrict Editing pane

3. Under Editing restrictions, select the [Allow only this type of editing in the document](#) checkbox. By default, *No changes (Read only)* is selected as the first option and the Exceptions (optional) heading appears.
4. Under Start Enforcement, click [Yes, Start Enforcing Protection](#). The *Start Enforcing Protection* dialog box appears, as shown in Figure 3-6.

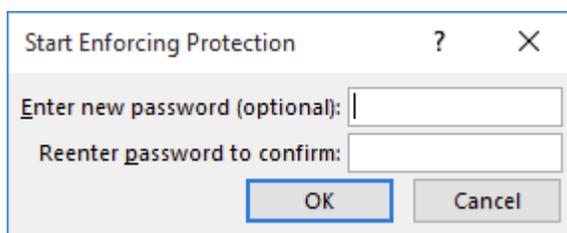


Figure 3-6
Start Enforcing Protection dialog box

Take Note

If your computer is set up to use Information Rights Management (IRM) by your administrator, the Start Enforcing Protection dialog box contains two options. The Password option shows that by adding a password, the document will not be encrypted. The *User authentication* option adds encryption to the document, with the restricted access preventing *sensitive documents* from being printed, forwarded, or copied.

5. Type [Pa\\$\\$w0rd](#) in the Enter new password box and the Reenter password to confirm box. Click [OK](#). The Start Enforcing Protection button turns on the specified

restriction, in this case making the document Read only. The document is now protected from any editing and you can view only this region. A region is the location in the document that you are allowed to edit. The Restrict Editing pane displays two available options: Find Next Region I Can Edit and Show All Regions I Can Edit. These display the areas in your document that you have been granted permission to edit.

6. Click the **Find Next Region I Can Edit** button and notice that Word states that it has finished searching the document—there were no regions highlighted. Click **OK**.
7. Click the **Show All Regions I Can Edit** button and no regions are highlighted. This is a read only document, so no editing is allowed.
8. Click the **Stop Protection** button at the bottom of the pane. An *Unprotect Document* dialog box appears.
9. In the Password text box, type **Pa\$\$w0rd** and then click **OK**.
10. Clear the **Allow only this type of editing in the document** checkbox.
11. **CLOSE** the Restrict Editing pane.
12. **SAVE** the document as **Peer Review 2** in your flash drive in the lesson folder.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step **Restrict a Document with Comments Only**

GET READY. USE the **Peer Review 2** document that is open from the previous exercise.

1. On the Developer tab, in the Protect group, click the **Restrict Editing** button. The Restrict Editing pane appears.
2. Select the **Allow only this type of editing in the document** checkbox.
3. Click the **drop-down arrow** and then select **Comments**.
4. In the *Start Enforcement* section, click the **Yes, Start Enforcing Protection** button. The *Start Enforcing Protection* dialog box opens, which turns on the set restriction for comments only.
5. Type **Pa\$\$w0rd** in the Enter new password (optional) box and in the Reenter password to confirm box. Click **OK**. Only comments can be added to the region.
6. Click **Show All Regions I Can Edit**; the insertion point moves to the heading.
7. Select **Jill A. Williams** and on the Review tab, in the Comments group, click the **New Comment** button. A new comment box appears.
8. Type **Jill's middle initial is E**. The comment appears in the comment box.
9. Click the **Stop Protection** button at the bottom of the Restrict Editing pane. The *Unprotect Document* dialog box appears.
10. Type **Pa\$\$w0rd** and then click **OK**.
11. Clear the **Allow only this type of editing in the document** checkbox.
12. **SAVE** the document as **Peer Review 3** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step **Limit Formatting Styles in a Document**

GET READY. USE the **Peer Review 3** document that is open from the previous exercise.

1. In the Restrict Editing pane, in the Formatting restrictions section, select the [Limit formatting to a selection of styles](#) checkbox. Selecting this option enables you to set formatting restrictions for this document.
2. Click the [Settings](#) link. The *Formatting Restrictions* dialog box appears, as shown in Figure 3-7. The check marks indicate that all styles are allowed.

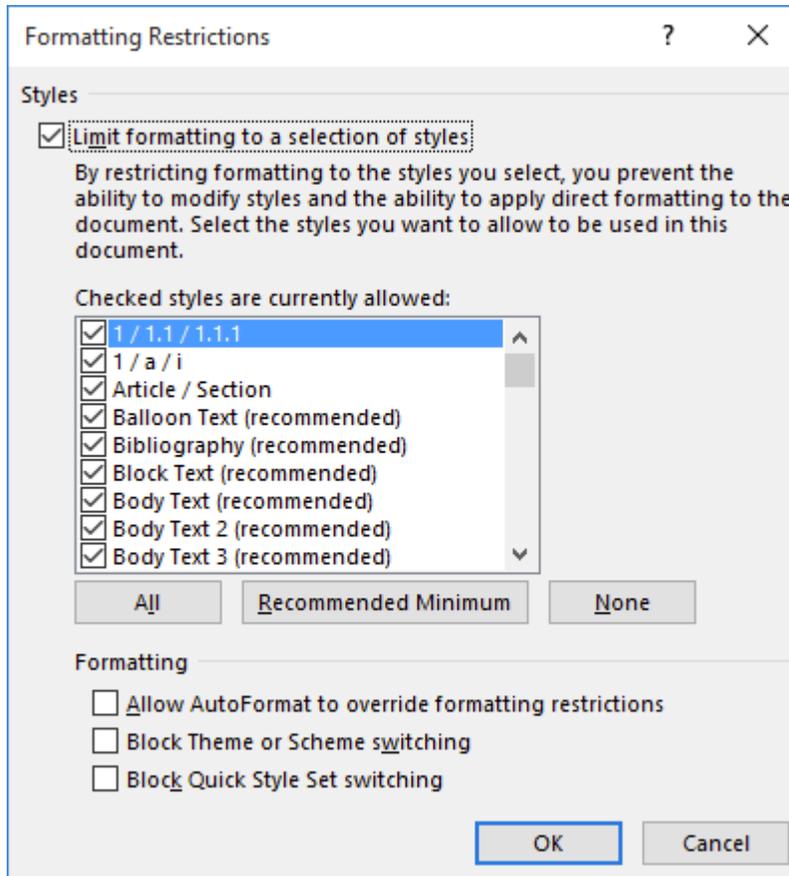


Figure 3-7
Formatting Restrictions dialog box

3. In the Formatting section, select the [Block Theme or Scheme switching](#) checkbox and then click **OK**. Selecting this option blocks the user from making any changes to the structure, pattern, or theme of the document. A prompt appears, stating that *This document may contain formatting or styles that aren't allowed. Do you want to remove them?*
4. Click **Yes**. On the Design tab, in the Document Formatting group, notice that the *Themes* button is grayed out, making it unavailable.
5. In the Restrict Editing pane, click [Settings](#) again to open the *Formatting Restrictions* dialog box.
6. Clear the [Block Theme or Scheme switching](#) checkbox and then click **OK**.
7. Click **OK**. The same prompt appears as before.
8. Click **Yes**. Notice that the *Themes* button is now available. You can now use the *Themes* commands in the group.
9. In the Formatting restrictions section of the Restrict Editing pane, clear the [Limit formatting to a selection of styles](#) checkbox.

10. **CLOSE** the Restrict Editing pane.
11. **SAVE** the document with the filename **Peer Review 4** in the lesson folder on your flash drive.
12. On the Design tab, in the Document Formatting group, change the Style Set to **Lines (Simple)**.
13. The headings, Employee Information, Review Guidelines, and Evaluation are not displaying correctly in the table.
14. On the Table Tools - Layout tab, in the Cell Size group, change the cell height to **0.30** to accommodate the content in those three cells.
15. On the Home tab, in the Styles group, change the font color for Heading 3 to **White, Background 1** and **bold**.
16. Leave the document open for ten minutes. Later in this lesson, you learn about managing document versions.
17. Minimize the document to place it on the taskbar. You will use this document later in this lesson.

PAUSE. LEAVE Word open for the next exercise.

Take Note

You can restrict comment creation to a whole document or you can select portions of the document in which editing changes are allowed.

Step by step Mark a Document as Final

GET READY. OPEN the **Review Form** document from the lesson folder.

1. **SAVE** the document as **Review Form 1** in the lesson folder on your flash drive.
2. Click the **File** tab, click **Protect Document**, and then click **Mark as Final**. A dialog box appears indicating that this document will be marked as final and then saved.
3. Click **OK**. A Microsoft Word message box appears. Marking a document as final prevents recipients from making changes to the document—the document becomes read only, as displayed on the title bar. When a document is marked as final, the status property is set to *Marked as Final* and typing, editing commands, and proofing marks are turned off.
4. Click **OK**. The document is Marked as Final and displays in the Protect Document section highlighted in a light yellow color to discourage editing.
5. Return to the document and notice the yellow bar below the Ribbon indicating that *An author has marked this document as final to discourage editing*. Notice also that the Marked as Final icon appears on the status bar.
6. Click any of the tabs on the Ribbon and notice that the controls are greyed out, indicating that the commands are not available.
7. Select the title of the document and try to delete it. When a document is marked as final, typing, editing commands, and proofing marks are disabled, because the document becomes a read-only document. Notice that the title bar also shows the document as Read-Only.
8. Click the **File** tab, click the **Protect Document** button, select **Mark as Final** to return

the document to its original status, and then return to the document.

9. Select the **B** in *Blue Yonder Airlines* and then press the **Delete** key. You can now make changes to the document.
10. Click the **Undo** button on the Quick Access Toolbar.
11. **SAVE** the document with the same filename in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note

Documents that have been marked as final in a Microsoft Office 2016 program will not be read only if they are opened in versions of Microsoft Office programs prior to 2013. It is important to recognize that the Mark as Final command is not a security feature—anyone who receives an electronic copy of a document that has been marked as final can edit that document by removing the Mark as Final status from the document.

Applying Protection Using the Ribbon

Encrypt protects a document so that it cannot be opened without a password.

Step by step Encrypt a Document

GET READY. USE the **Review Form 1** document that is open from the previous exercise.

1. Go to **Backstage**, click the **Protect Document** button, and then select **Encrypt with Password**.
2. The *Encrypt Document* dialog box appears (see Figure 3-8). Encrypting protects the document by making it unreadable, using a code that is only reversible using the password you specify.

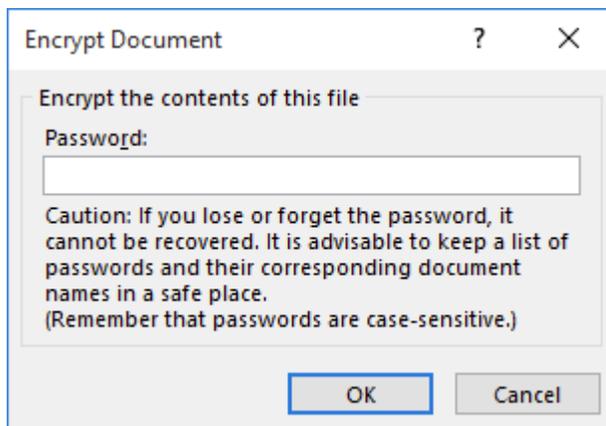


Figure 3-8
Encrypt Document dialog box

3. In the Encrypt the contents of this file text box, type **Pa\$\$w0rd** and then click **OK**.
4. Retype the password and then click **OK**. Notice that **Protect Document** is highlighted and indicates that a password is required to open this document.
5. **CLOSE** the document.
6. Click **Save** when prompted.

7. **REOPEN** the document by typing **Pa\$\$w0rd** when you are prompted to do so.

Take Note

To unprotect the document, you must already be inside the document (with the correct password). From within the document, click the File tab, click the *Protect Document* button, select *Encrypt with Password*, delete the password from the dialog box, and then click *Save*.

8. **SAVE** the document as **Review Form 2** in the lesson folder on your flash drive and then **CLOSE** the file.

PAUSE. LEAVE Word open to use in the next exercise.

Managing Document Versions

Microsoft has simplified the tasks of retrieving a document by versions or recovering an unsaved file. Have you accidentally deleted your whole document or turned off your computer before saving? Word can help you retrieve your document by using the managed versions. You can manage document versions in Backstage by using the Info command and then selecting which version to save. Word also provides the ability to recover unsaved documents by automatically saving them every ten minutes by default. You will be able to recover versions of your document as long as you haven't closed your document or program. Also, if the Word program stops working for some reason, then you will be able to recover your document, but you will not see your previous versions until you save the document. Under Manage Document, you can also browse for unsaved files. In this exercise, you manage a document's versions with an existing file and a new file and recover an unsaved version.

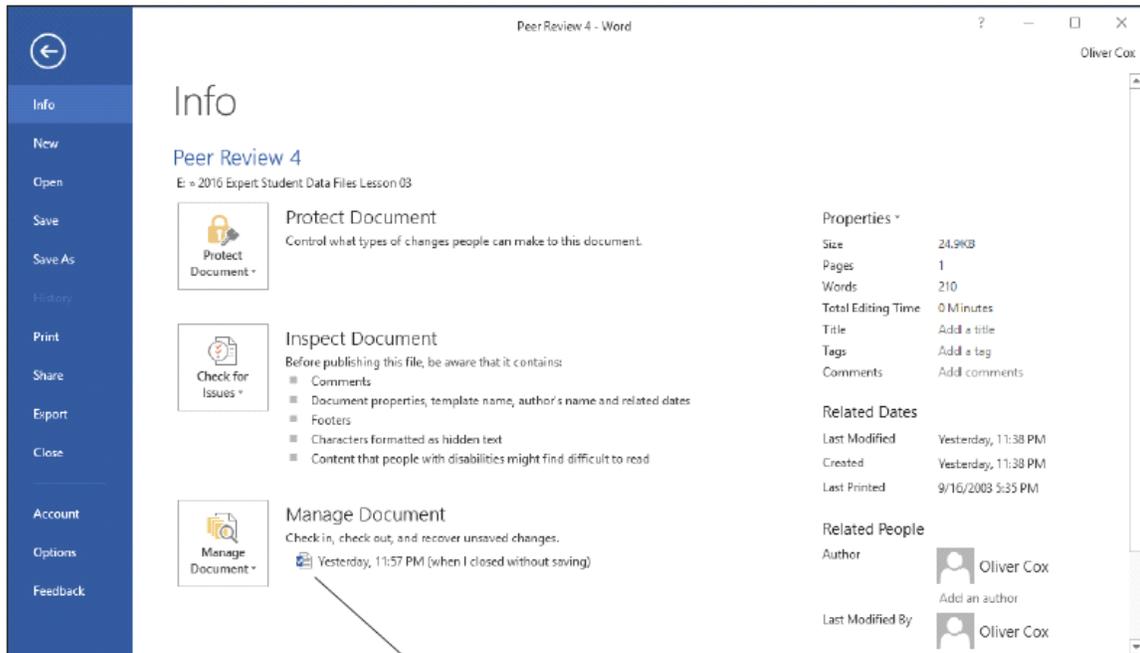
Managing Document Versions

The AutoRecovery command provides flexibility in saving your Word documents, including making more frequent backups. In this exercise, you will learn how to change the default Save settings from 10 minutes to 3 minutes.

Step by step Manage Document Versions

GET READY. On the taskbar, CLICK the **Peer Review 4** document to make it the active document. Remember, you minimized this document previously in this lesson. The document should have been left open for 10 or more minutes.

1. Click **File** to go to Backstage view. On the Info screen, under Manage Document, you should see the times the document was saved.
2. Click **Close** without saving and keep Word open. Closing the Word program would cause you to lose your versions of the **Peer Review 4** document
3. **OPEN** the **Peer Review 4** document from your flash drive in the lesson folder.
4. Go to the Backstage Info screen (see Figure 3-9). Notice that Manage Document shows when the document was last saved.



Specifies when the document was saved

Figure 3-9
Versions without saving

5. In the Backstage view, select **Options** to open the *Word Options* dialog box.
6. From the list in the left pane, select **Save** (see Figure 3-10).

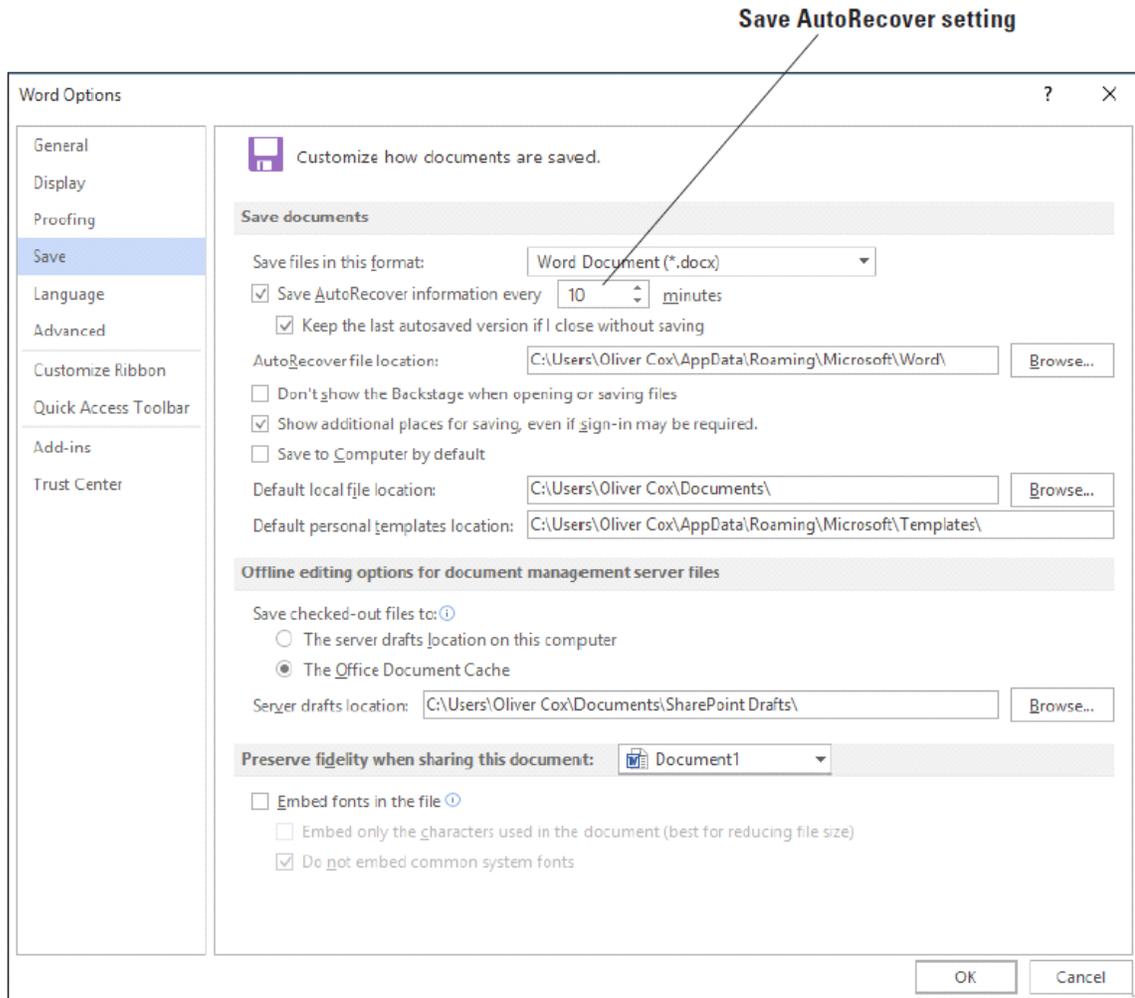


Figure 3-10
Word Options Save screen

7. By default, the Save AutoRecover information every setting is 10 minutes. Also, the Keep the last autosaved version if I close without saving checkbox is selected. In step 3, you closed the document without saving and when you reopened and reviewed the Managed Document, it showed when the document was last saved using Autosave.
8. In the Save documents section, change the default 10 minutes to 3 minutes.
9. Click **OK**.
10. Create a new blank document and then type [Working with unsaved documents can be found in Backstage on the Info screen](#).
11. Keep this document open for 10 minutes.
12. On the View tab, click [Switch Windows](#) and then select the **Peer Review 4** document.
13. Return to Backstage and under Manage Document, you should see at least one or two versions of the document saved.
14. **SAVE** the document as **Peer Review 5** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open for the next exercise.

Take Note

Clicking the down arrow key in Manage Document enables you to Recover Unsaved Documents; the Open dialog box opens files specifically from the location where unsaved files are saved.

Restoring an Earlier Version of Your Document

The Save AutoRecover feature in Word 2016 saves documents automatically by time, displaying them as *Today (current date)*. In the previous exercise, you changed the Save AutoRecover setting from the default of 10 minutes to 3 minutes. As you modify your document, AutoRecover saves changes every 3 minutes. Word saves the updates in different versions, which you can locate in Backstage under Manage Document. In this exercise, you restore an earlier version of your document.

Step by step Restore an Earlier Version of Your Document

GET READY. USE the **Peer Review 5** document that is open from the previous exercise.

1. Select the **Blue Yonder Airlines** heading.
2. Change the font color to **Dark Blue, Text 2**.
3. Increase the font size to **28 pt**.
4. Where Jill A. Williams' name appears, replace the middle initial A. with **E**.
5. Change the review period date from Dec 20XX to **April 20XX**. You have to modify the document for Save AutoRecover to save the updated changes.
6. Go to Backstage and under Manage Document, click a version that indicates (*autosave*). A new window appears, showing a bar below the Ribbon that says *Autosaved Version—A newer version is available* (see Figure 3-11). When you click the Compare button, a summary appears that compares the original document and the revised document. The Restore button prompts you to overwrite your previous document.

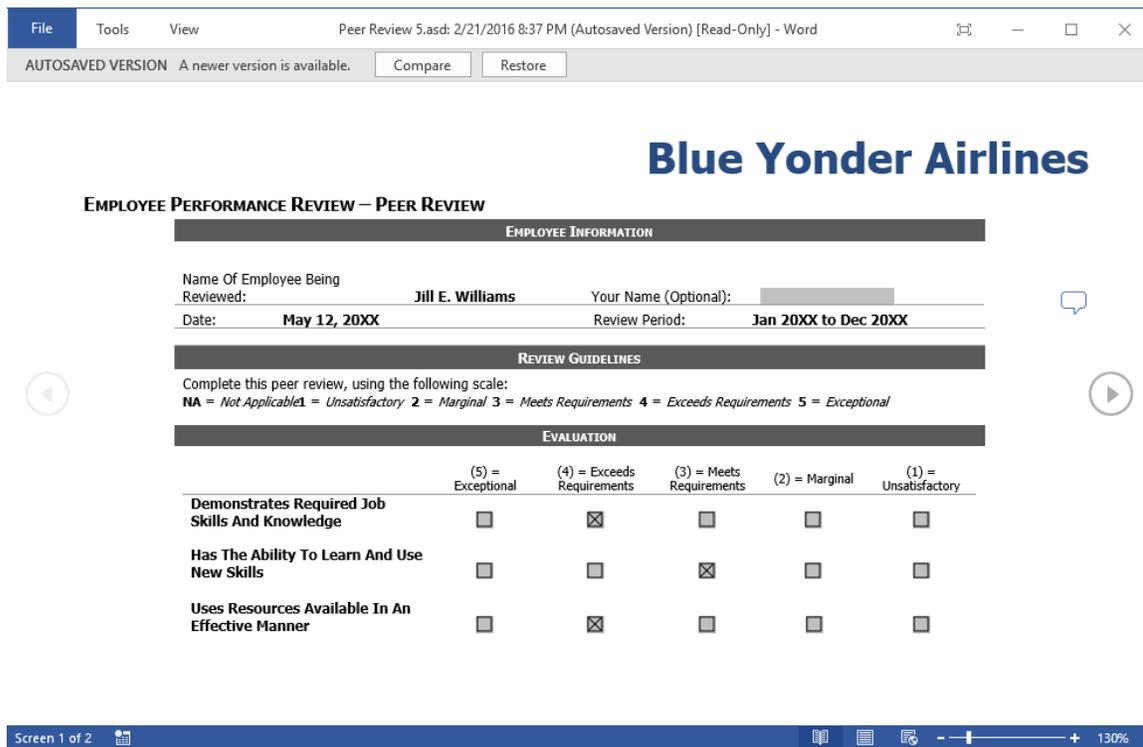


Figure 3-11
Autosaved Version

7. Click **Restore** to overwrite your previous document. A message box appears, prompting you to confirm that you want to overwrite the last saved version with the selected version.
8. Click **OK**.
9. **CLOSE** the document.

PAUSE. LEAVE Word open for the next exercise.

Recovering Unsaved Documents

As you continue working on documents, you can browse or recover unsaved files through Manage Document in Backstage. You can also open a document based on the time or the last version within that session. In this exercise, you recover an unsaved document.

Step by step Recover Unsaved Documents

Previously, you typed *Working with unsaved documents can be found in Backstage in the Info screen* in a new document and you changed the *Save AutoRecover information* from the default 10 minutes to 3 minutes.

GET READY. CLOSE the document that you typed. A prompt to save your document appears. The prompt states, *If you click "Don't Save," a recent copy of this file will be temporarily available.*

1. Click **Don't Save**.
2. Click the **File** tab and then click **Open**.

3. Scroll down to the bottom of the screen and then click **Recover Unsaved Documents**. An *Open* dialog box appears (see Figure 3-12).

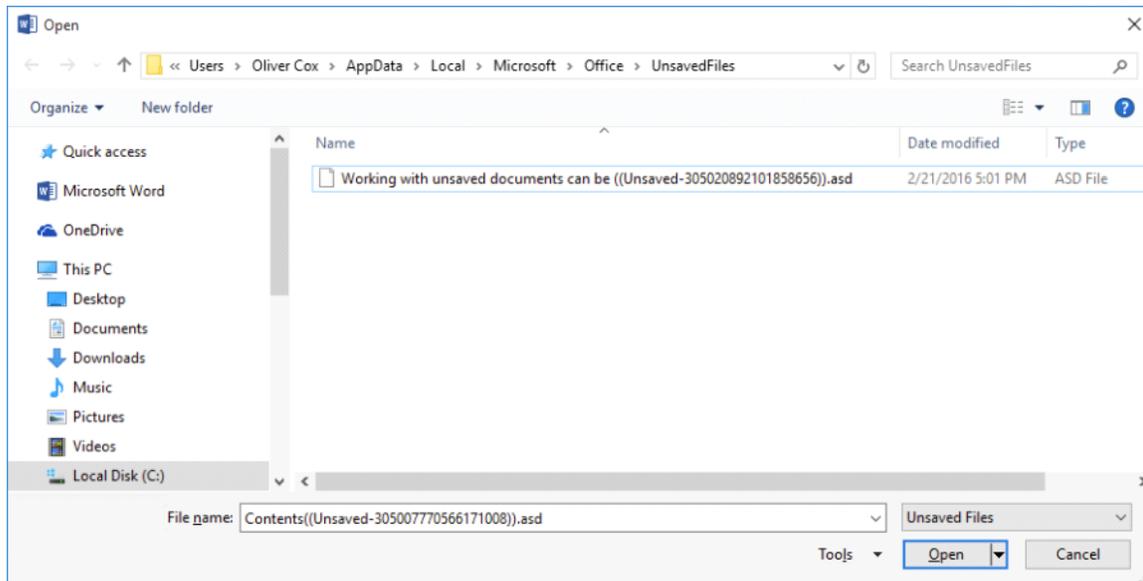


Figure 3-12
Open dialog box for unsaved files

4. Locate your file based on the date and time you closed the document or program or locate *Working with unsaved documents can be . . .*. You closed the document without saving it with a filename; therefore, the name will show the first part of the text that you typed. Word places unsaved documents in a temporary location on your hard drive and gives them an ASD file extension.
5. Select the unsaved document and then click **Open**. The document opens with the Recovered Unsaved File prompt appearing below the ribbon, stating *This is a recovered file that is temporarily stored on your computer*.
6. Click **Save As**.
7. **SAVE** the document as **Unsaved Document** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step **Delete All Draft Versions**

GET READY. USE the **Unsaved Document** document that is open from the previous exercise.

1. Click the **File** tab, click the **Manage Document** button, and then click **Recover Unsaved Documents**. An *Open* dialog box appears, displaying the contents of the UnservedFiles folder.
2. Right-click the *Working with unsaved documents can be . . .* file and, on the context menu, select **Delete**.
3. Select **Cancel** to close the *Open* dialog box.
4. **CLOSE** the **Unsaved Document** file.

PAUSE. LEAVE Word open to use in the next exercise.

Take Note

Word stores unsaved documents in a specific location on your hard drive, with a file extension of ASD. The files located in the UnsavedFiles folder are temporary files until you save them with a new file name.

Sharing Documents

Many of the documents created in a business environment will need to be shared with others. Before you share a document, it is important to ensure that the document has a professional appearance. Microsoft Word 2016 has three tools to help you with this: Document Inspector, Accessibility Checker, and Compatibility Checker. In addition, Word 2016 makes it easy for you to share your documents with colleagues, clients, and others using several formats.

Using the Document Inspector

Word contains a feature that removes unwanted information from your document's properties. The Document Inspector can find and remove hidden data and personal information in Word 2016 documents, as well as earlier versions. It is a good idea to inspect a document before sharing an electronic copy, such as an e-mail attachment. In this exercise, you inspect a document and remove personal information.

Step by step Use the Document Inspector

GET READY. LAUNCH Word if it is not already running.

1. **OPEN** the **Employment Offer Letter** document from your lesson folder. Notice that the document opened in Compatibility Mode. Keep this in mind for later.
2. **OPEN** Backstage, click the **Check for Issues** button, and then click **Inspect Document**. The *Document Inspector* dialog box appears (see Figure 3-13). This command checks for hidden properties and personal information.

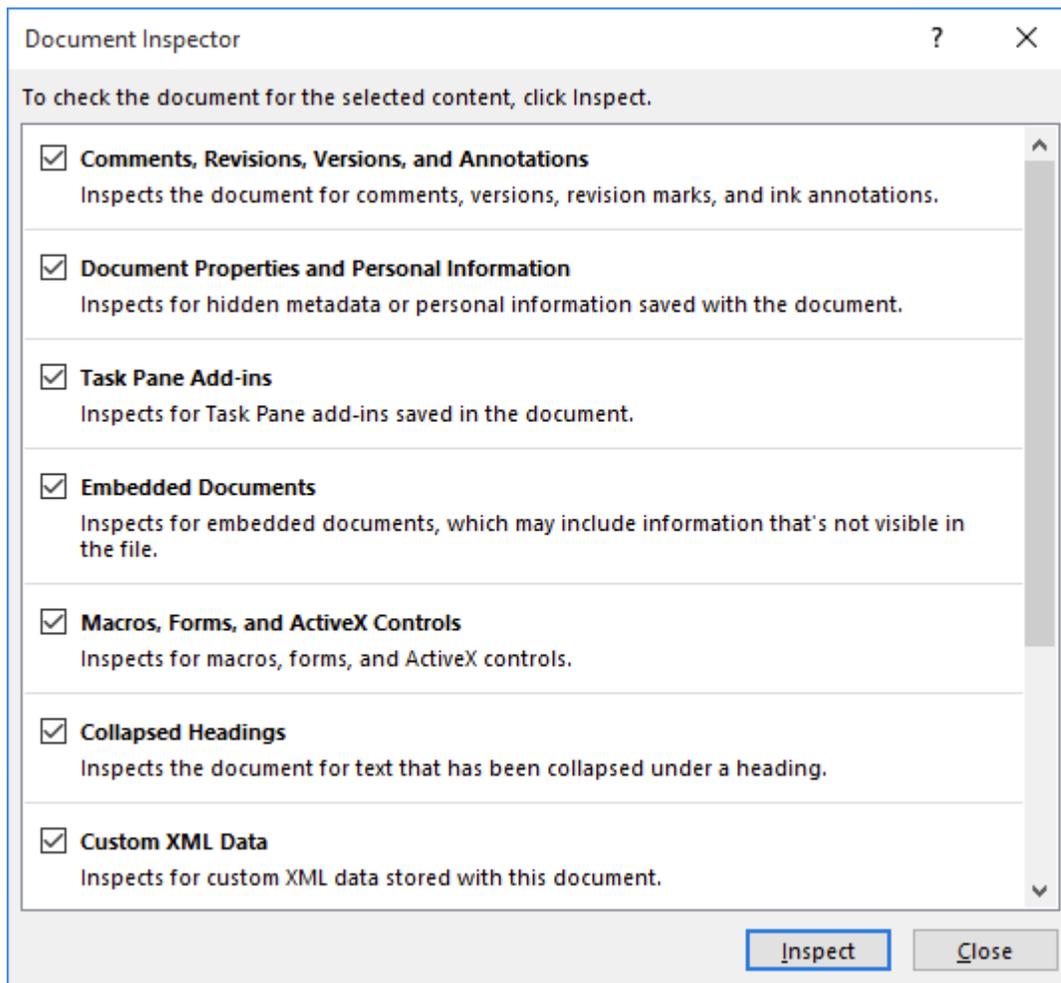


Figure 3-13
Document Inspector dialog box

3. Click the [Inspect](#) button. Word inspects the document and displays the results in the Document Inspector window. Three warnings appear in the Document Inspector, two of which are shown in Figure 3-14.

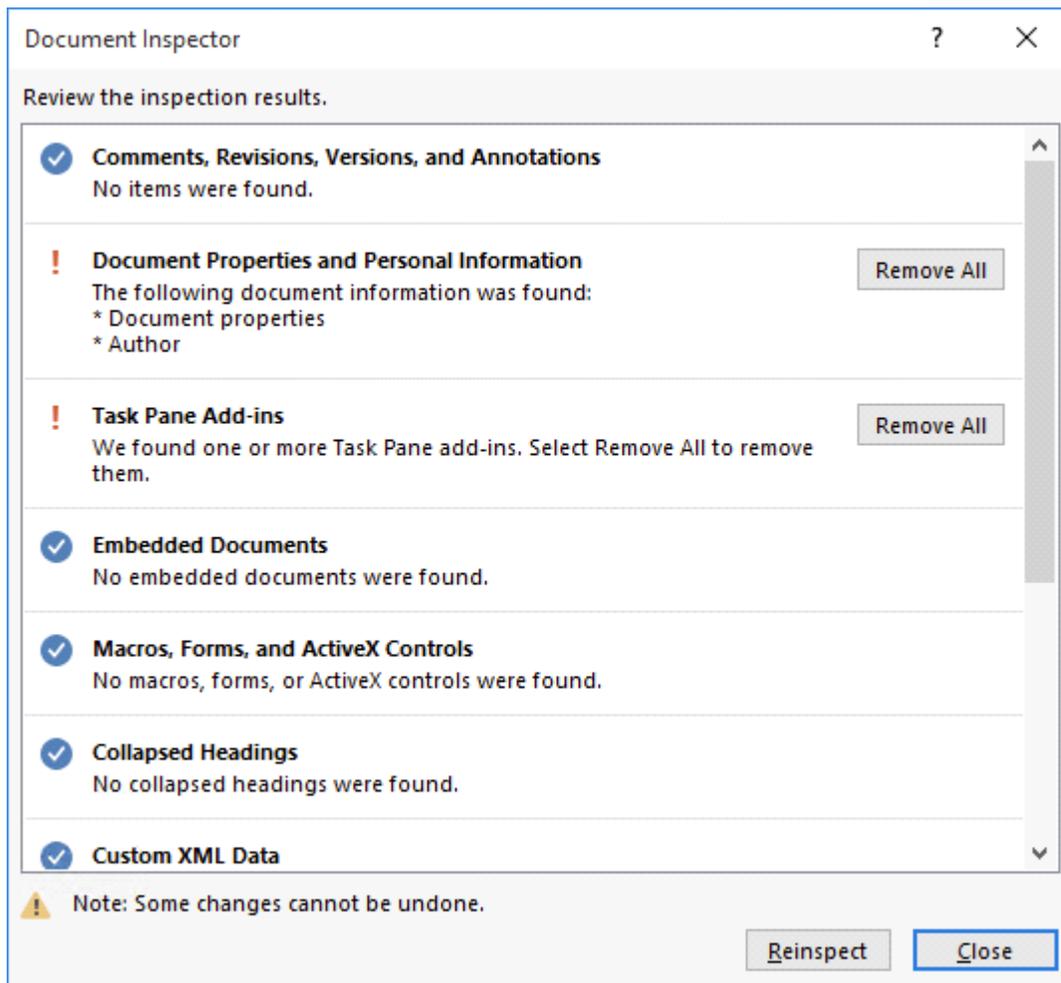


Figure 3-14
Document Inspector results

4. In the Document Properties and Personal Information section, click [Remove All](#). Word removes personal information from the document properties and prepares the document to be shared.
5. Make no changes to the Task Pane Add-ins and Headers, Footers, and Watermarks sections.
6. Click [Close](#).
7. In the *Inspect Document* section, click the [Allow this information to be saved in your file](#) link.
8. **SAVE** the document as **Employment Offer Letter 1** in the lesson folder on your flash drive. A Microsoft Word prompt appears, stating *Your document will be upgraded to the newest file format*. Click **OK**.

PAUSE. LEAVE the document open to use in the next exercise.

Checking Accessibility

The Accessibility Checker determines whether there are potential errors in your document and alerts you that the content might be difficult for an individual with a disability to read. Accessibility is defined as being accessible to those with disabilities.

Before sharing your document, it is important to perform an accessibility inspection, in case someone with a disability opens the document. In this exercise, you learn to check whether there are accessibility issues in your document.

Step by step Use the Accessibility Checker

GET READY. USE the **Employment Offer Letter 1** document that is open from the previous exercise.

1. **OPEN** Backstage, click the **Check for Issues** button, and then click **Check Accessibility**. The Accessibility Checker pane appears, as shown in Figure 3-15. If there are errors in your document, the Accessibility Check shows issues, warnings, or tips. In this case, a warning appears, specifying *Objects Not Inline*.
2. Return to Backstage. A bullet below Inspect Document indicates that the document contains *Content that people with disabilities find difficult to read*.
3. Return to the document.



Figure 3-15
Accessibility Checker pane

4. In the Accessibility Checker pane, select **Text Box 1**. A text box appears in the document with *Blue Yonder Airlines* in the background in very light text. Individuals with a disability could find this difficult to read.
5. With the text box selected, change the font color to **Green, Accent 1, Darker 50%**.

6. Now that the color is changed on the heading, return to Backstage. The same warning appears because the object is *not inline with text* and a person with a disability might still experience problems reading it.
7. Return to the document. Select **Text Box 1** and then press **Delete**.
8. Notice that the Accessibility Checker pane now displays *No accessibility issues found*.
9. **CLOSE** the Accessibility Checker pane.
10. **SAVE** the document as **Employment Offer Letter 2** in the lesson folder on your flash drive.

PAUSE. LEAVE Word open to use in the next exercise.

When creating a document that may be read by people who use accessibility tools on their computers, such as narration for the blind, there are some additional ways you can make the document easier for them:

- If the document has multiple columns, make sure there is a substantial gap of white space between each column.
- In tables, make sure the structure makes sense when read from left to right, row by row.
- Set text descriptions (alt text) for each image.
- Make sure any hyperlinks have short text descriptions.
- Do not rely on your font, font size, and color choices being displayed correctly, particularly when viewed on multiple devices and platforms.
- Make sure text color and its background contrast sharply, even in grayscale.
- Do not use text smaller than 10 points.

Checking Compatibility

Before sharing documents, it is good practice to check whether the document is error free and the formatting appears professional. It is also important to make sure other people will be able to open and read the document. Word's built-in Check Compatibility tool ensures that a document's features are compatible with other versions of Word. The Compatibility Checker searches a document for features that are not supported by earlier versions of Word and lists a summary of these features. When documents are saved in an earlier version and you open them in the latest version of Word, the filename appears in the title bar as *filename.docx (Compatibility Mode)*. It is recommended that you run the Compatibility Checker to identify the features that are supported. For example, if you created a document that contained predefined horizontal lines and saved it in Word 2007, Word 2016 highlights this in the Microsoft Word Compatibility Checker dialog box. In this exercise, you learn to check for issues in a document.

Step by step Use the Compatibility Checker

GET READY. USE the **Employment Offer Letter 2** document that is open from the previous exercise. When documents are created in an earlier version of Word and

opened in newer versions of Word, they open in Compatibility Mode and display in the title bar. Previously, you opened the **Employment Offer Letter** and it opened in Compatibility Mode. Even though you no longer see Compatibility Mode on the title bar, this document still contains features from an older version that are no longer supported by the latest version of Word. It is recommended that you run the Compatibility Checker to identify features that are supported in older versions

1. Go to Backstage, click **Check for Issues**, and then click **Check Compatibility**. The *Microsoft Word Compatibility Checker* dialog box appears, is displayed as in Figure 3-16. The Compatibility Checker displays the message: *The following features in this document are not supported by earlier versions of Word. These features may be lost or degraded when opening this document in an earlier version of Word or if you save this document in an earlier file format.*

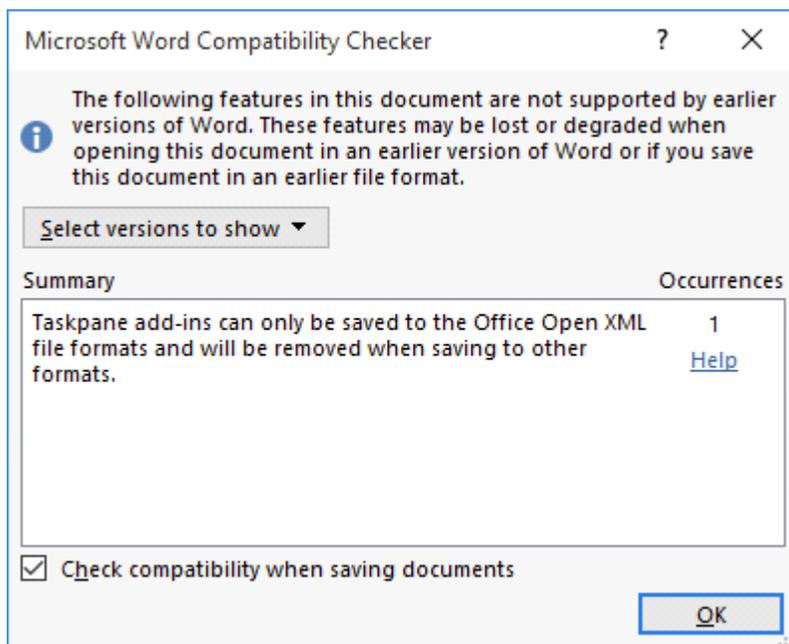


Figure 3-16
Compatibility Checker dialog box

Take Note

When sharing Word 2016 documents with individuals using earlier versions of Word, your document will need to be saved in the Word 97-2003 format. It is good practice to use the Compatibility Checker to ensure the features you have included in your document will not be removed or changed when you save it in the Word 97-2003 format.

2. Click **OK**.
3. **SAVE** the document as **Employment Offer 20XX** (replace XX with the current year) and make sure the file type displays as *Word Document*.

PAUSE. LEAVE the document open to use in the next exercise.

Sending Documents

Electronic documents can be sent via e-mail, web, and Internet fax. In Backstage, you can save the document in PDF and XPS format, or attach it to an e-mail. You can also change and create a document in different file formats. In this exercise, you send a document by e-mail and OneDrive and use the online presentation.

Step by step Send Documents via Email Using Outlook

GET READY. USE the **Employment Offer 20XX** document that is open from the previous exercise.

Take Note

For this exercise, you must use Microsoft Outlook 2016. If you are unsure, check with your instructor to determine whether you have access to Microsoft Outlook 2016 on your computer.

1. **OPEN** Backstage and then click **Share**. The Share page appears, displaying the options for sharing the document with others.
2. Click **Email**. The various options on how you can send the document appear, as shown in Figure 3-17. The document can be e-mailed as an attachment, you can send it as a PDF or XPS file, or as an Internet fax. There is also an option to send the document as a link, but it is grayed out, because it must be saved to a shared location first.

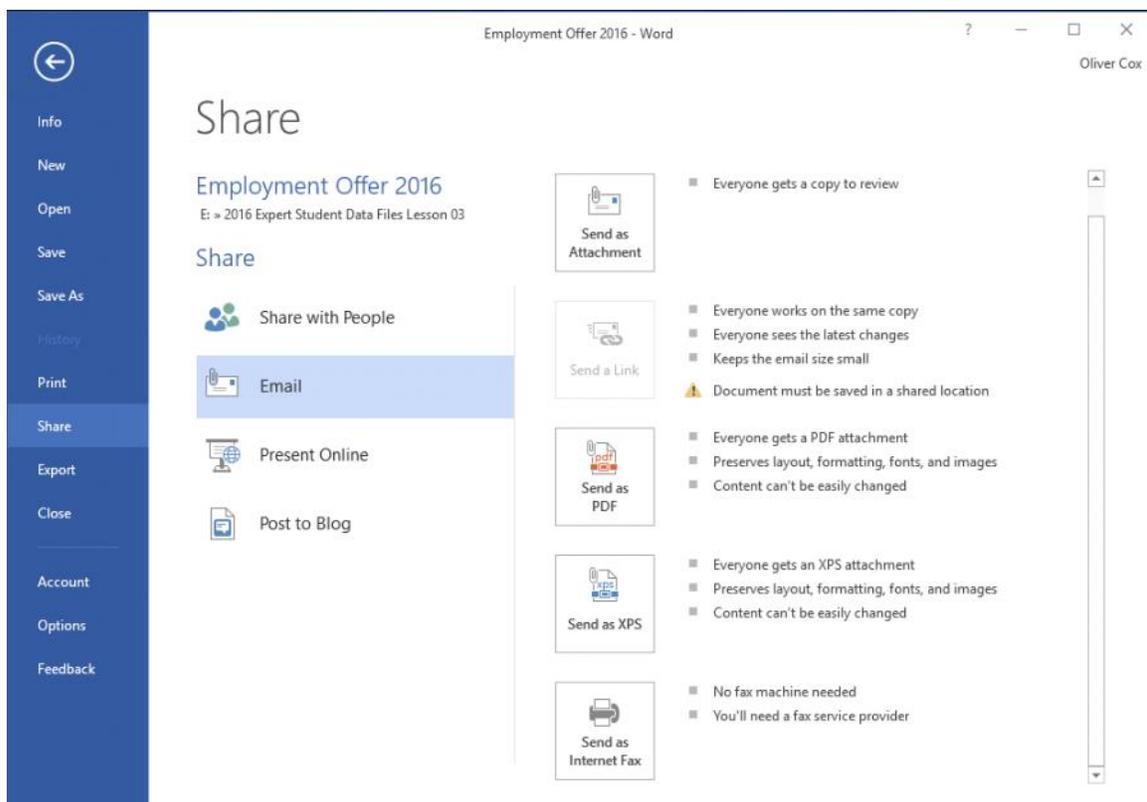


Figure 3-17
Share e-mail options

3. Select **Send as Attachment**. An Outlook message form appears with the document included as an attachment (see Figure 3-18).
4. Type the [email address] of a friend, classmate, or coworker in the To box, type a short message, and then click the **Send** button.

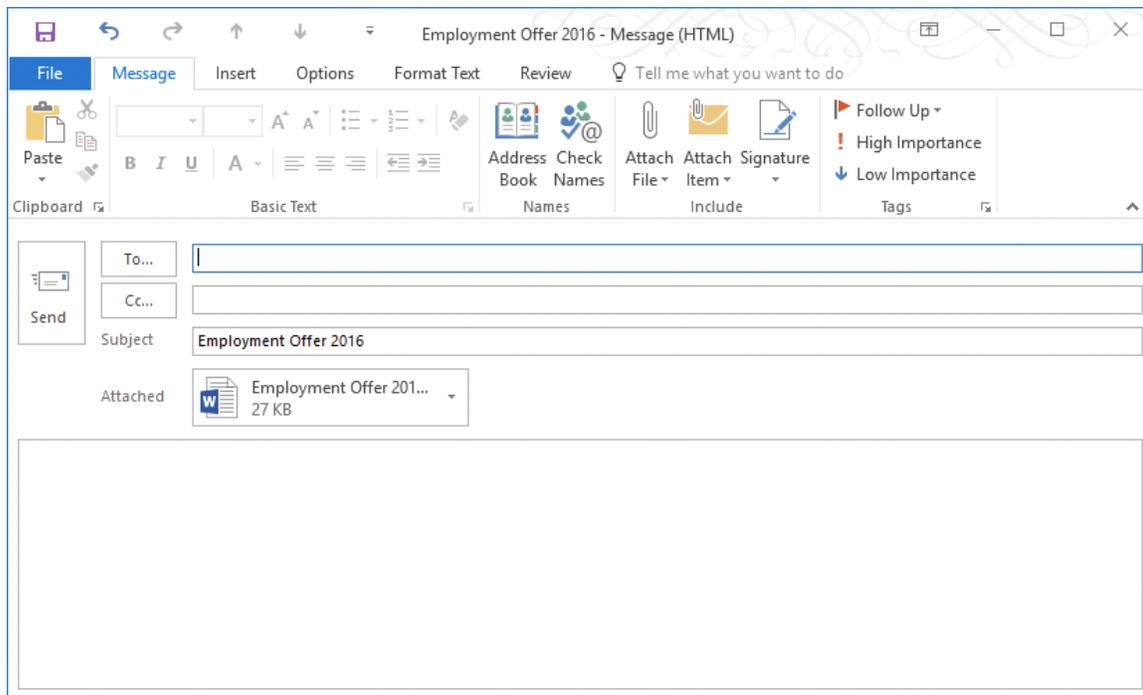


Figure 3-18
Outlook message with document attached

PAUSE. LEAVE the document open to use in the next exercise.

OneDrive is an online service provided by Microsoft. OneDrive is an online file storage location where you can store your documents and media files. At the time of this publication, Microsoft provides OneDrive members with 15 GB of free online storage space for personal use. OneDrive is password protected—so you control who has access to your files. You can access your files on OneDrive anywhere and anytime, from any computer, tablet, or smartphone with Internet access.

OneDrive can store any type of document, but it is best for sharing documents in Word, Excel, PowerPoint, and OneNote. You can also create a personal album to share pictures with your contacts or on your social networking site; create and send e-mails; manage your contacts; add events to your calendar; and stay updated and connected to your social networking sites.

Take Note

The information about OneDrive, the login information, and the images are all current at the time this book was published. Things change frequently on the web and OneDrive is no exception. Please check the OneDrive website or use Bing to search for more up-to-

date information.

Step by step Send Documents via OneDrive

GET READY. USE the **Employment Offer 20XX** document open from the previous exercise. For this exercise, you need a Microsoft account. If you have a OneDrive, Outlook, Hotmail, Xbox Live account, or other Microsoft service account, then you already have a Microsoft account. If you need a Microsoft account, launch your browser and complete the steps as listed in the website at <https://signup.live.com/>.

1. Go to Backstage and then click **Account**. The Account page appears.
2. Sign in with your Microsoft account, if necessary.
3. Once you are connected, the *Account* screen changes and your personal profile appears (see Figure 3-19).
4. In the Office Background drop-down list, select **Calligraphy**. Look at the upper-right corner as the screen background changes.
5. In the Office Theme drop-down list, select **Dark Gray** and watch how the background color darkens.

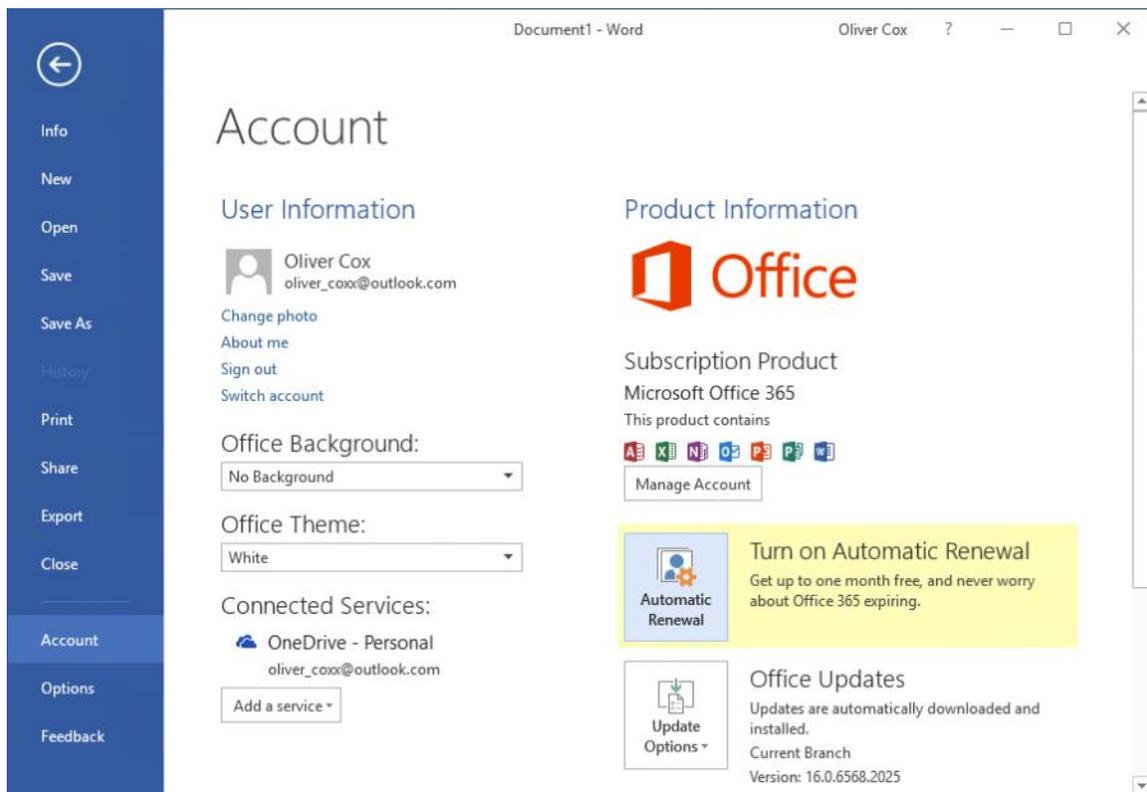


Figure 3-19
Account screen

6. Change the Office Theme setting back to **White**.
7. Click **Share** on the left pane. Under Share with People, click **Save to Cloud**. The screen changes to the Save As screen.
8. Select **OneDrive**. On the right side of the screen, the folders in your OneDrive appear.

9. Click **OneDrive - Personal**. The *Save As* dialog box appears.
10. Click **Save** to save your document to the OneDrive folder.
11. Once the file is saved, return to Backstage, click **Share**, and then click **Share with People** again. The document appears, with a Share pane (see Figure 3-20). You can now share the document with anyone by sending them an invitation to edit or view the document

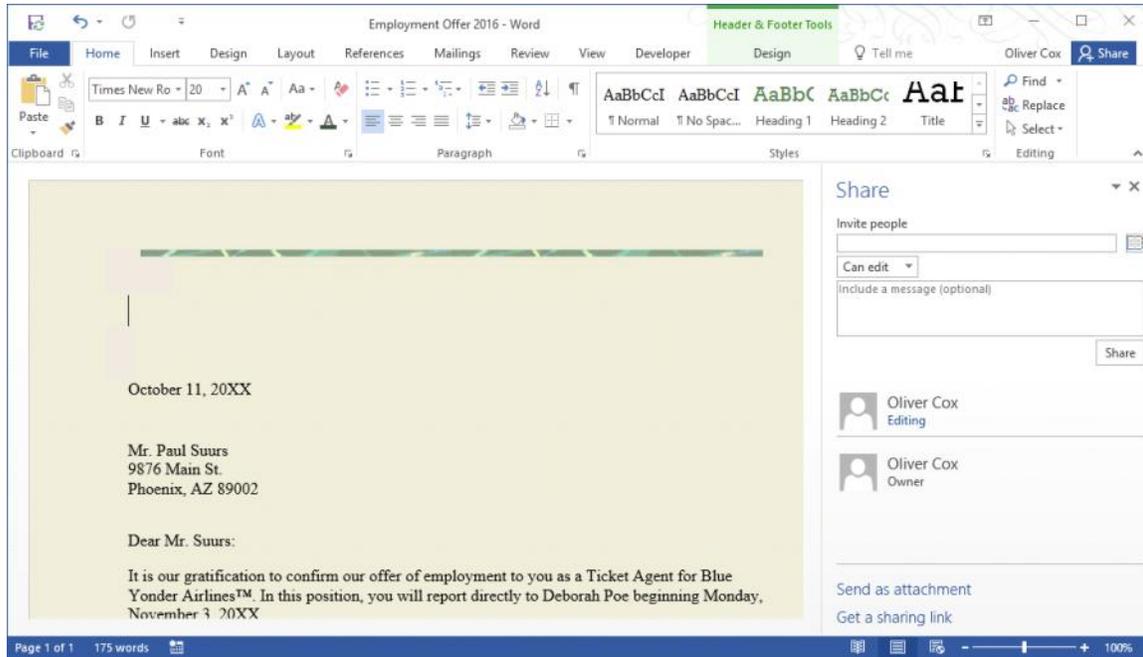


Figure 3-20
Share pane

12. Select someone in class and then type his or her **[email address]** along with a short message.
13. Click the **Share** button and an e-mail is automatically sent to him or her. When he or she opens the e-mail, a link to the document appears. Clicking the link opens the document in the Microsoft Word Web App.

Take Note

The individual receiving the e-mail must be signed in to a Microsoft account before editing the document.

14. **CLOSE** the Share pane.

PAUSE. LEAVE the document open for the next exercise.

Step by step Present Online

get ready. USE the **Employment Offer 20XX** document open from the previous exercise. Sharing a Word document by using the Present Online feature is easy because there is no setup. The Present Online feature enables you to create a link to your document and present to others, even if they do not have Word installed on their computers. The link

that you create will open in a browser. In this exercise, you create a link to share your document with others in a web browser

1. In Backstage, select the [Share](#) group.
2. Click the [Present Online](#) button.
3. Read the Service Agreement and then select the [Enable remote viewers to download the document](#) checkbox. Click [Present Online](#) to connect to Office Presentation Services. You have two options available on how to present. You can select Copy Link or Send in Email—send an invitation that links to your presentation.
4. Click [Start Presentation](#). Your screen should match Figure 3-21. You can send invitations and invite others to view your presentation and if you need to edit the document, you can do so in the same screen.

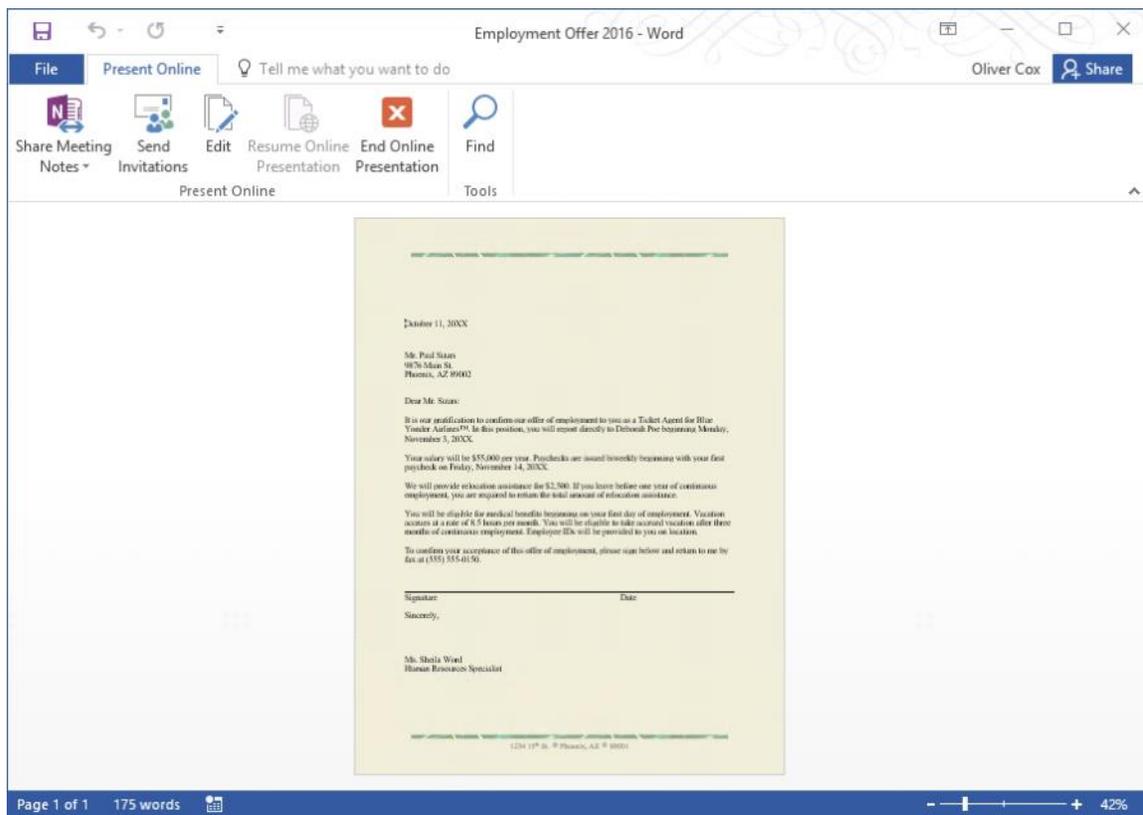


Figure 3-21
Present Online screen

5. Click [End Online Presentation](#). A warning prompt appears and states, *All people will be disconnected if you continue. Do you want to end this online presentation?*
6. Click [End Online Presentation](#).
7. **CLOSE** the file. When you close the file, you will be prompted to save and then the file will be saved to your OneDrive account.

STOP. CLOSE Word and then CLOSE the Internet connection.

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. A document that is protected from editing, but allows comments is protected using which of the following features?
 - a. Restrict Formatting
 - b. Protected from using comments
 - c. Comments features was turned off
 - d. Editing Restrictions
2. Unsaved documents can be recovered using which of the following?
 - a. multiple users.
 - b. Manage Document.
 - c. OneDrive.
 - d. Save As.
3. Which of the following commands would alert you if your document contains potential problems causing the content to be difficult to read by an individual with a disability?
 - a. Check Accessibility
 - b. Check Compatibility
 - c. Inspect Document
 - d. All of the above
4. Before sharing a document, it is good practice to remove personal information using which command?
 - a. Check Accessibility
 - b. Check Compatibility
 - c. Inspect Document
 - d. No command is available
5. Draft versions of documents can be deleted by:
 - a. right-clicking and then selecting Delete.
 - b. using Manage Document.
 - c. pressing the Delete key.
 - d. a and b

True/False

Circle T if the statement is true or F if the statement is false.

- T F** 1. The Compatibility Checker ensures that the document's features are compatible with other versions of Word.
- T F** 2. The Compatibility Checker lists a summary of features not supported by earlier versions.
- T F** 3. OneDrive is a way to share documents.
- T F** 4. Formatting restrictions enable users to limit the styles applied in a

document.

T F 5. Read only prevents changes to a document.

Projects

Project 3-1: Formatting a Document

In this project, you will format a coffee menu document and have it ready for a meeting within the hour.

GET READY. LAUNCH Word if not already running.

1. **OPEN** the **Coffee Menu** document from the lesson folder.
2. Go to Backstage, click **Options**, and then click **Save**.
3. Under the Save section, change the Save AutoRecover information every setting to 3 minutes and then click **OK**.
4. Select the heading **Grand Street Coffee Shop**.
5. Change the font color and then select **Purple, Accent 4, Lighter 80%**.
6. Change the page border to a **Shadow** style with the border color of **Purple, 4 ½ pts** wide.
7. Select **Menu** and then change the font size to **26 pt bold italics**.
8. Change the font to **Cambria** and the color to **Purple, Accent 4, Darker 50%**.
9. Select **Menu** and use the **Format Painter** and apply the format to *Nutritional Information*.
10. Apply a page color and then select **Purple, Accent 4, Lighter 80%**.
11. **CLOSE** the document without saving. A prompt should appear, saying *If you don't save, a recent copy of the document will be temporarily available*.
12. Click **Don't Save**. In the next exercise, you recover your unsaved document.

Pause. LEAVE Word open for the next project.

Project 3-2: Managing Versions

In this project, you will continue with the previous project. You have realized that you inadvertently didn't save the document. Your task is to retrieve the unsaved document.

GET READY. LAUNCH Word if not already running.

1. **OPEN** a new blank document.
2. Go to Backstage and then click the **Manage Document** button.
3. Select **Recover Unsaved Documents**.
4. Locate the unsaved file, click **Open**, and then click **Restore**.
5. **SAVE** the document as **3-2 Coffee Menu** in the lesson folder on your flash drive and then **CLOSE** the file.

CLOSE Word.