

# FastCourse Microsoft® Word 2016 Level 3

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Custom Performance Solutions



**LABYRINTH**  
LEARNING™

Berkeley, CA

*FastCourse Microsoft Word 2016: Level 3*

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EVALUATION ONLY

WORD 2016

# Collaborating in Word

**T**he Internet makes it easy for project teams to collaborate on drafting documents. Team members can exchange documents across the country as easily as across the hall. There are several features that make collaboration activities more efficient. For example, you can track all of the changes made to a document by each team member and combine these changes into a single document for review. In this chapter, you will work with these collaboration tools.

## LEARNING OBJECTIVES

- Use the highlighter tool
- Track your changes to a document
- Review tracked changes from others
- Send emails from Word
- Review changes from multiple reviewers
- Compare documents with no tracked changes

## CHAPTER TIMING


- Concepts/Develop Your Skills: 2 hrs 30 mins
- Self-Assessment: 20 mins
- Total: 2 hrs 50 mins

## PROJECT: COLLABORATING ON A MANUAL

As a member of the human resources department, you have been working to finalize the Raritan Clinic East Policies & Procedures Manual. It's now ready for review by personnel in the human resources department. As others review the manual, they will use collaboration tools to mark suggested changes. Some reviewers will insert comments to identify their recommendations, while others will use the Track Changes feature to mark suggested edits. Some will highlight text to identify wording that needs revising. Your task will be to review all suggested edits and comments and finalize the document for printing.

# The Highlighter




The highlighter pen works just like its real-life counterpart (except that you can easily erase the highlighting). The pen applies a transparent color to the text background and offers a variety of highlighting colors. You can color-code the highlights you use in a document if you wish. For example, you might highlight a note to yourself in yellow and a “waiting for information” reminder in green.

☰ Home → Font → Text Highlight Color 

## DEVELOP YOUR SKILLS: W1-D1

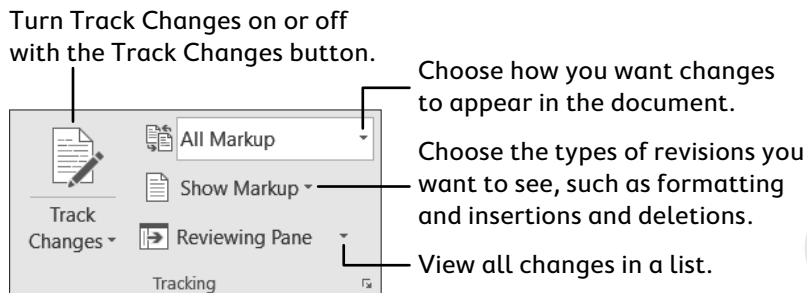
*In this exercise, you will highlight a note to yourself and a reminder that you are waiting for additional information from the Finance department.*

*Before You Begin: Be sure to visit the Learning Resource Center at [labyrinthelab.com/lrc](http://labyrinthelab.com/lrc) to retrieve the exercise files for this course before beginning this exercise.*


1. Start Word, open **W1-D1-PolicyManual** from your **Word Chapter 1** folder, and save it as **W1-D1-PolicyManualRevised**.
  2. Make sure the insertion point is at the beginning of the document, open the Navigation pane, and then do a search for *Pediatric General Medicine*.
  3. On page 2, position the insertion point in front of *Pediatric*.
  4. Type this text and tap  after the period: **Chin has more information about these specialties.**
  5. Choose **Home** → **Font** → **Text Highlight Color**  **menu button** ▼ and then choose **Bright Green** from the gallery.
  6. Drag the pen across the text you just added to highlight it.
  7. Choose **Text Highlight Color**  to turn off the pen.
  8. Press  +  or scroll down to move to the end of the document and then type this text: **Check with Finance to see if they have information to add.**
  9. Select the sentence, choose **Text Highlight Color**  **menu button** ▼, and then choose **Yellow**.
  10. Save the file and leave it open.
-

# Tracking Changes to a Document

Track Changes is one of the most useful tools for collaborating with team members as you pass documents back and forth. Reviewers can track changes while they edit, and the originator can see who is making what changes in the document and either accept or reject the suggested changes.



Reviewers can also use the Comment feature to leave messages in a document as a means of collaborating with the originator. For example, reviewers may want to explain to the originator why they are making a particular change.

☰ Review → Tracking → Track Changes 

## Review and Collaboration

You will often have opportunities at school and work to collaborate with others on writing projects. In today's world, when requests for instant feedback are the norm, knowing the typical online reviewing process can ensure that you're well-prepared to be a valuable contributor. Reviewers use Track Changes to mark edits and add comments so reviewers and the originator can converse back and forth. It's important to use Track Changes so the originator can see all of the proposed edits. Files may be passed back and forth among team members via email, cloud storage, or other means. Then the originator can combine the edited documents, accepting and rejecting edits to create the final document.

### Viewing Tracked Changes

You have options for viewing edits made to documents using Track Changes. The method you choose is a matter of personal preference.

- **Inline:** Edits are marked directly within sentences and paragraphs. Text that is deleted by the reviewer is colored and marked through with a line, and text that is added appears underlined and in a different color.
- **Balloons:** Comments and edits appear in balloons on the right side of the document called the markup area. Each balloon identifies the person who made the edit as well as the type of edit made—inserted text, deleted text, and so forth.



View the video “Display Options for Track Changes and Comments.”


## Setting the Username and Initials

Track Changes uses information set up in the Word Options dialog box to identify the username for edits made to a document. As a result, whenever you collaborate on a document in which Track Changes is used, it is important to make sure your username and initials are set correctly.

☰ Review → Tracking → dialog box launcher  → Change User Name

## Setting Reviewer Ink Colors

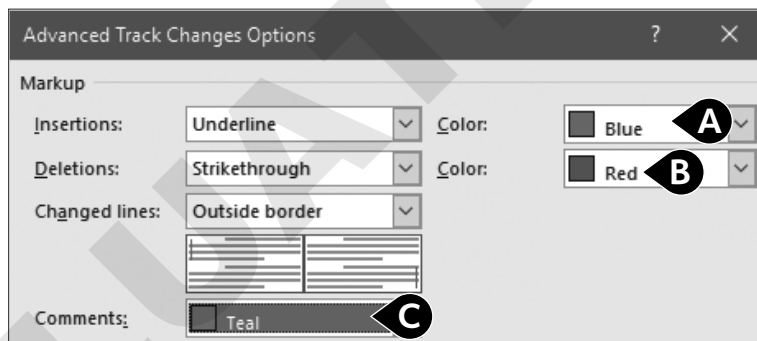
Track Changes can use different colors to distinguish the edits of each reviewer who works on the document. Each reviewer can specify colors for his or her comments and tracked changes. This makes it easier to rapidly identify changes submitted by a specific reviewer. It also allows you to keep a consistent color for a reviewer you work with frequently, rather than settling on colors that may be assigned automatically.

☰ Review → Tracking → dialog box launcher  → Advanced Options

### DEVELOP YOUR SKILLS: W1-D2

*In this exercise, you will turn on Track Changes, change the tracking colors, and set the user's name and initials for the revised Raritan Clinic East policy manual.*

1. Choose **Review** → **Tracking** → **dialog box launcher**  and then click the **Advanced Options** button.
2. Follow these steps to choose options for your reviewer ink color settings:

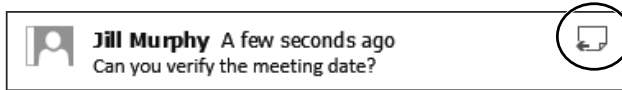


- A Set the color for Insertions to **Blue**.
  - B Set the color for Deletions to **Red**.
  - C Set the color for Comments to **Teal**.
3. Click **OK**.
4. Click the **Change User Name** button at the bottom of the Track Changes Options dialog box and, if necessary, enter your username and initials.
5. If you want to override the settings from the current Microsoft Account, check the checkbox below the Initials field, **Always Use These Values Regardless of Sign In to Office**, and then click **OK** twice.



## Adding Comments to a Track Changes Document




The Comment feature is a great collaboration tool to use in conjunction with Track Changes. The Reply button in the comment balloon allows reviewers and originators to communicate back and forth during the editing and reviewing process. For example, a reviewer might want to point out the reason for a deletion.



☰ Review → Comments → New Comment 

### DEVELOP YOUR SKILLS: W1-D3

In this exercise, you will choose the balloon display for tracking changes, and then you will insert a comment and make revisions to the document.

1. Save your file as **W1-D3-PolicyManualRevised**.
2. If necessary, choose **Review** → **Tracking** → **Display for Review**  and then choose **All Markup** from the menu.
3. Choose **Review** → **Tracking** → **Track Changes**  and, if necessary, display formatting marks.
4. Choose **Review** → **Tracking** → **Show Markup** → **Balloons** and, if necessary, choose **Show Revisions in Balloons**.
5. Scroll to page 2. In the last paragraph on the page, select *Referral* at the beginning of the paragraph.
6. Choose **Review** → **Comments** → **New Comment** .
7. Type this text in the comment balloon: **Indent to match other paragraphs.**
8. In the same paragraph, locate and select the text (*see Appendix A*) in the next line and then delete it.
9. Follow these guidelines to continue with deletions:
  - Search for the word *see* to locate each additional cross-reference to an appendix. Hint: Remember to use the down arrow in the Navigation pane to move to each instance of the word.
  - Delete the cross-reference for Appendices B-K.
  - Delete extra spaces between words where appropriate.
10. Search for *Patient Management Procedures* and then position the insertion point at the end of the heading.

11. Follow these steps to insert introductory text for the heading:

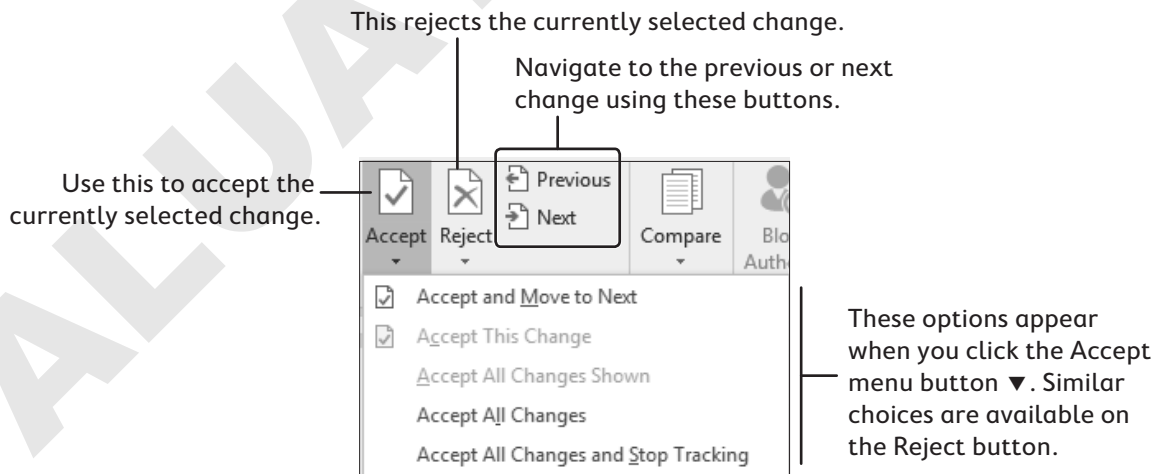


- A Tap **Enter**.
  - B Tap **Tab** and then type the text shown here.
  - C Notice the gray change bar in the left margin that helps locate changes.
12. Close the Navigation pane and save the file.

## Reviewing Tracked Changes

Reviewers' tracked changes are only suggestions that don't become permanent unless the originator accepts them. If the originator doesn't agree with a reviewer's suggestion, it can be rejected.



It's easy to find and review changes to a document. When you review changes, you can jump from one change to the next, giving you the opportunity to accept or reject each change in order. You can also accept or reject all changes at once. After you accept or reject a change, the revision marks are removed.




## Displaying Tracked Changes

You can display tracked changes in four distinctive views. Depending on the type of detail you want to focus on, each view offers specific advantages.













VIEWS FOR TRACKED CHANGES	
Markup	Description
Simple Markup	This shows where a change occurred with a red change bar in the margin. Clicking the change bar displays the markup details.
All Markup	This option shows all markups.
No Markup	This hides all markups and displays a final document appearance with the proposed changes.
Original	Select this to show the original document and hide all markups.

☰ Review → Changes → Accept  or Reject 

☰ Review → Tracking → Display for Review 

## DEVELOP YOUR SKILLS: W1-D4

*In this exercise, you will display the document using different markup views. Then you will review tracked changes to the document, accepting some changes and rejecting others.*

1. Save your file as **W1-D4 - PolicyManualRevised**.
2. Choose **Review** → **Tracking** → **Display for Review**  → **Original** and then scroll through the document.
3. Choose **Display for Review**  → **All Markup** and then scroll through the document.
4. Choose **Display for Review**  → **Simple Markup** and then scroll through the document.
5. Choose **Display for Review**  → **No Markup** and then scroll through the document.
6. Position the insertion point at the top of the document.
7. Choose **Review** → **Changes** → **Next** .
8. Choose **Accept** .
9. Choose **Accept** .
10. Choose **Accept** .
11. Choose **Next**  to skip the comment and move to the next change, the deleted reference to *Appendix A*.
12. Choose **Reject** .
13. Reject each deleted reference to an appendix.
14. Choose **Review** → **Comments** → **Delete** .
15. Choose **Review** → **Tracking** → **Track Changes**  to turn off the feature.
16. Position the insertion point at the beginning of the paragraph starting with *Referral* (bottom of page 2) and tap **Tab** to indent the first line.
17. Save the file.

# Saving and Sending Files

Before reviewers can do their jobs, you must get the document to them. You can use the Internet to share your document in several ways, including the following:

- Email
- Microsoft OneDrive
- Network drive



This chapter uses email as the method for sharing files.

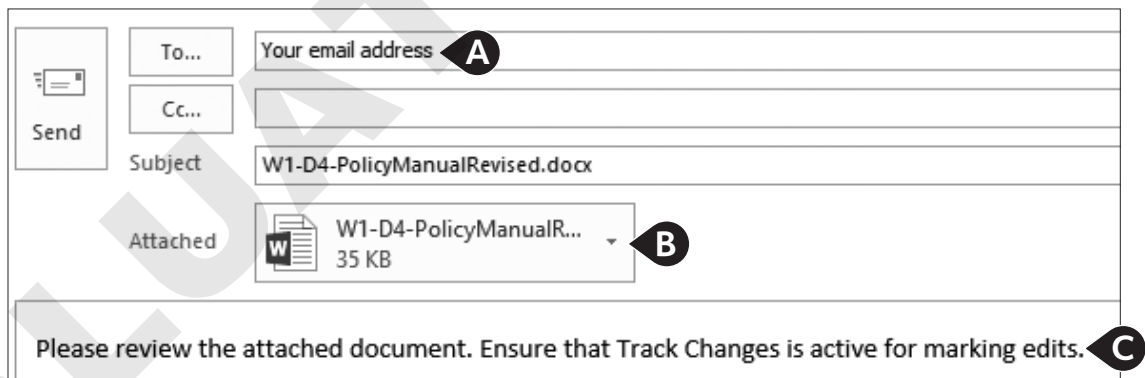
Experience shows that it works best to name each copy of a document sent for review with the reviewer's name. Then, as the documents are returned from review, it's easy to track which reviewer sent each one. It's also a good idea to save all reviewer copies in a single folder to keep them together.

☰ File→Share→Email 


## DEVELOP YOUR SKILLS: W1-D5

*In this exercise, you will send an email with a copy of the policy manual document attached. For this example, you will send the attachment to your own email address.*

1. Choose **Review**→**Tracking**→**Track Changes** .
2. Choose **File**→**Share**→**Email**  and then choose **Send as Attachment**.
3. Follow these steps to complete the email form:




The screenshot shows an email composition window. On the left is a 'Send' button. The 'To...' field contains 'Your email address' with a circled 'A' next to it. The 'Cc...' field is empty. The 'Subject' field contains 'W1-D4-PolicyManualRevised.docx'. Below the subject is an 'Attached' section showing a document icon, the text 'W1-D4-PolicyManualR...', and '35 KB' with a circled 'B' next to it. The body of the email contains the text 'Please review the attached document. Ensure that Track Changes is active for marking edits.' with a circled 'C' next to it.

- A Enter your actual email address here (don't type the text shown).
  - B Verify that the attachment appears here.
  - C Add this message for the reviewers.
4. Send the email.
5. Choose **Review**→**Tracking**→**Track Changes**  to turn off Track Changes.

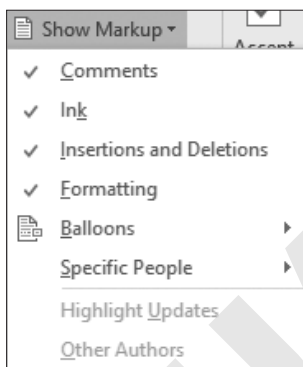
# Reviewing Changes from Multiple Reviewers

If you set up a document to track changes, you can send copies of the document for review by others. As the reviewers make revisions, their changes are tracked. When the reviewers send you their edited copies, you can combine the tracked changes into a single document. Each reviewer's changes are marked in a different color so you can recognize input from different reviewers. After the changes are merged, you can navigate through the combined document and accept or reject edits from all users at one time. In fact, by seeing the edits from all reviewers in one document, you will be able to identify the trouble spots in the document because different reviewers may try to modify the same area of the document.

☰ Review → Compare → Compare  → Combine

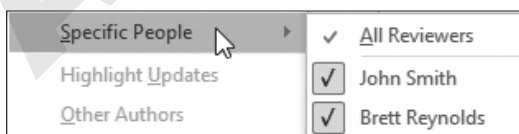
## Displaying Specific Markups and Reviewers

There are numerous options for displaying tracked changes for combined documents. For example, you may want to look at only the insertions and deletions suggested by reviewers. If you don't need to keep track of formatting changes, you may wish to turn off the Formatting option so you won't be prompted for formatting changes.




☰ Review → Tracking → Show Markup 

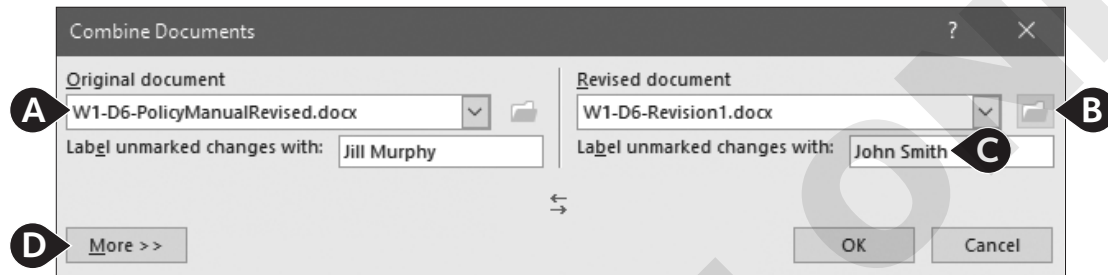
If you combine two reviewer documents with the original, you can choose to see changes from both at once, or, at times, you may wish to focus on just one reviewer. You can do that by removing the checkmark in front of the other reviewer's name.



## DEVELOP YOUR SKILLS: W1-D6



In this exercise, you will combine proposed changes from two reviewers with the original document. You will also explore additional features used for working with combined documents.



1. Save your file as **W1-D6-PolicyManualRevised**.
2. Choose **Review**→**Compare**→**Compare**  and then choose **Combine**.
3. Follow these steps to begin combining documents:



- A Choose **W1-D6-PolicyManualRevised** here.
  - B Click **Browse** and open **W1-D6-Revision1** from your **Word Chapter 1** folder.
  - C Although there may be another name in this field, type **John Smith** here so you'll know who suggested any unmarked changes.
  - D Click **More >>** to expand the dialog box.
4. Follow these steps to control document display:



- A Ensure that **Word Level** is active.
  - B Choose **Original Document**.
5. Click the << **Less** button to collapse the dialog box; click **OK**.
  6. Click **Compare** , slide the mouse pointer to **Show Source Documents**, and then, if necessary, choose **Hide Source Documents**.
  7. Choose **Compare**  and then choose **Combine**.
  8. In the Original Document field, choose **W1-D6-PolicyManualRevised**.
  9. Click the **Browse** button next to the Revised Document field and open **W1-D6-Revision2** from your **Word Chapter 1** folder.

10. Type **Brett Reynolds** in the Label Unmarked Changes With field and click **OK**.
  11. If necessary, choose **Review**→**Tracking**→**Reviewing Pane**  **menu button** ▼ and then choose **Reviewing Pane Vertical**.
  12. Scroll down the Reviewing Pane to the suggested change by Brett Reynolds, where he deleted *attending*.
  13. Click *attending* in the Reviewing Pane and notice that the document scrolls to the location of that change.  
*Notice the Deleted: attending balloon in the Markup Area.*
  14. Click the **Close**  button at the top of the reviewing pane.
  15. Press **Ctrl** + **Home** to move to the top of the document.
  16. Review all changes to the document:
    - Delete all comments and accept all formatting changes.
    - Accept all edits by John and Brett with one exception: On page 3, John deleted a space between (*see Appendix B*) and *Children*. Reject that change.
  17. Save the file as **W1 - D6 - Combined** and then close it.
- 

## Comparing Documents



Sometimes documents that are sent for review are returned with no visible edits. Reviewers might turn off Track Changes so that the edits they make are not immediately evident. To determine whether edits have been made, you can use the Compare feature. It enables you to merge two documents into one file; then the documents are examined and automatically marked up using Track Changes so you can locate edits.

### To Combine or Compare?

The basic procedures are the same for comparing and combining documents, but each command has a different use.


The Combine command allows you to combine the tracked changes from one or multiple reviewers in one document, and then you can go through the single document to accept or reject the changes.

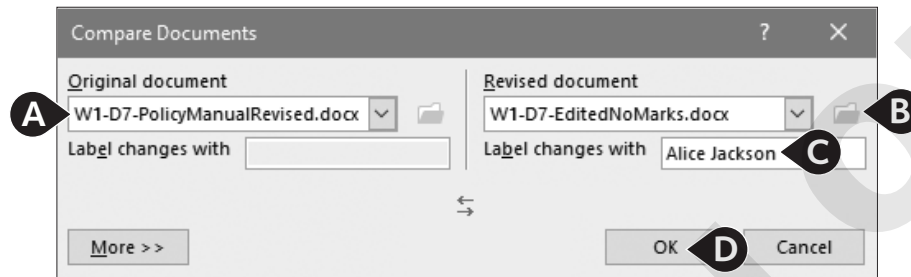
The Compare command is designed for comparing two documents: one edited version of a document, in which the reviewer did not use Track Changes, and the original. If you attempt to use the Compare feature to add a second reviewer's document, you will be advised that it will automatically accept the first person's changes before comparing the second edited document. Thus, you won't have the option of accepting or rejecting changes from the first reviewer.

 **Review**→**Compare**→**Compare** →**Compare**

## DEVELOP YOUR SKILLS: W1-D7

In this exercise, you will compare an original document with a document received from a reviewer that appears to have no changes in it.

1. Open **W1-D6-PolicyManualRevised** from your **Word Chapter 1** folder and save it as **W1-D7-PolicyManualRevised**.
2. Choose **Review**→**Compare**→**Compare**  and then choose **Compare** from the menu.
3. Follow these steps to compare this file with another document:



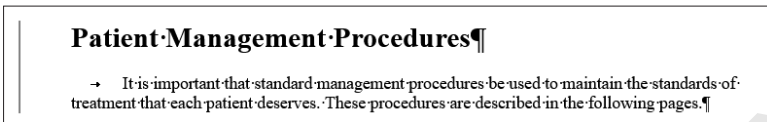
- A Choose **W1-D7-PolicyManualRevised** as the original document.
  - B Click the **Browse** button for the revised document, navigate to your **Word Chapter 1** folder, and choose **W1-D7-EditedNoMarks**.
  - C Type **Alice Jackson** here to identify the reviewer.
  - D Click **OK** and then click **Yes** if you're asked if you want to continue with the comparison.
4. Scroll through the document and observe Alice's edits.
5. Save the file as **W1-D7-AliceEdits** and exit Word.



# Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. Displaying balloons is the only method you can use to view changes in a document. True False
2. The Reply button in the comment balloon allows reviewers and originators to communicate back and forth during the editing and reviewing process. True False
3. The Track Changes feature cannot indicate which author made a particular change. True False
4. The highlighter pen works just like its real-life counterpart (except you can easily erase the highlighting). True False
5. This image shows the Simple Markup view for tracked changes. True False



6. You must examine each proposed change before accepting or rejecting it; you cannot accept all changes at once. True False
7. You can switch off the display of a specific reviewer's tracked changes by removing the checkmark in front of the reviewer's name. True False
8. When you review tracked changes, you cannot navigate within the document; you must use the Find button to locate changes. True False
9. You can merge two documents into one file and review all tracked changes at once. True False
10. The basic procedures are the same for comparing and combining documents, but each command has a different use. True False
11. There are numerous options for displaying tracked changes for combined documents. Which of the following is NOT an option for showing tracked changes?
  - A. Insertions and Deletions
  - B. Formatting
  - C. Highlighting
  - D. Specific People
12. The Label Changes With field in the Compare Documents dialog box is designed to do which of the following?
  - A. Allow you to change the ink colors
  - B. Specify the storage location for the reviewer's document
  - C. Identify the reviewer
  - D. Allow you to change the reviewer's initials

(continued)

13. What happens if a reviewer did not use Track Changes but you need to see the changes they made?
- A. You must return the document to the reviewer and ask that reviewer to use the Compare feature.
  - B. The documents are compared and the Track Changes markings are used to display the changes.
  - C. You will not be able to incorporate the changes into the original document.
  - D. You have to turn on the highlighter to see the changes.
14. Which of the following is an accurate statement regarding Track Changes?
- A. The feature is an add-in, which you must purchase separately from Microsoft.
  - B. All additions to a document are always displayed in bright green.
  - C. Word inserts tracked changes from a reviewer's document at the end of the original draft.
  - D. Reviewers can specify colors for their own comments.

EVALUATION ONLY

WORD 2016

# Sharing and Securing Content

In this chapter, you will work in Backstage view to control document access. Online storage, such as OneDrive, allows people to store and retrieve documents from any computer with Internet access, and virtual collaboration means that your documents are often in others' hands. There are features that help you control document content and security and guard your personal information.

## LEARNING OBJECTIVES

- Use file compatibility features
- Check documents with the Document Inspector
- Restrict formatting and editing in a document
- Mark a document as final
- Secure documents with passwords

## CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs 30 mins
- Self-Assessment: 20 mins
- Total: 2 hrs 50 mins

## PROJECT: SECURING CONFIDENTIAL INFORMATION

At Raritan Clinic East, privacy and security of patient records are vitally important. As a Raritan employee, you will explore features that ensure that documents sent outside the clinic remain confidential and contain no information that could enable those receiving the documents to learn more about patients than they have a need to know. You will use Backstage view and identify some of the security features you can use.

# Preparing Documents for Sharing

There are a number of things to think about when sharing documents with colleagues or clients. Compatibility issues between the current and earlier versions of Word should be considered. Additionally, documents can contain hidden or personal information about your organization or about the document that you do not want to share publicly. The Document Inspector can help you deal with these matters.



## Compatibility Issues

The most recent versions of Word (2007–2016) use the *.docx* file format. Versions of Word prior to 2007 used a *.doc* file format. Benefits of the latter format include smaller file size, improved damaged-file recovery, and more control of personal information. It's important to understand how the current version of Word behaves with documents created in earlier versions. Likewise, you need to make sure your documents can be read by those using earlier versions. There are several things to think about in dealing with compatibility issues.

- The latest versions, Word 2016 and Word 2013, are compatible.
- Word 2007, 2010, and 2013 can open *.docx* files created with Word 2016.
- Opening a document in Word 2016 that was created in Word 2010 or earlier opens in Compatibility Mode. The features in Word 2016 are downgraded to be compatible with the older versions. The term [*Compatibility Mode*] appears in the title bar.
- To open a Word 2016 document in Word 2010 or earlier, you can install the Compatibility Pack for Word, which you can download for free from the Microsoft website.
- You can convert documents to Word 2016 that were created in versions prior to Word 2013.
- You can save a Word 2016 document as a Word 97-2003 document so it can be opened by users of those versions. Some features of the current version either won't be available or will be modified in a manner more compatible with older versions.

### DEVELOP YOUR SKILLS: W2-D1

*In this exercise, you will open a Word 2003 document in Word 2016 Compatibility Mode. You will then try to insert a Word 2016 SmartArt graphic (a new feature) in the 2003 document and see how Compatibility Mode deals with this feature.*

1. Start Word, open **W2-D1-2003ProcMan** from your **Word Chapter 2** folder, and save it as **W2-D1-2003ProcManRevised**.
  2. If necessary, display formatting marks and then position the insertion point in front of the paragraph mark at the top of page 2.
  3. Choose **Insert**→**Illustrations**→**SmartArt** .
  4. Click **Cancel** to close the Diagram Gallery.
  5. Choose **File**→**Save As** and navigate to your **Word Chapter 2** folder.
  6. Click **Back**  in the upper-left corner to return to the document.
  7. Leave the file open.
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## To Convert or Not to Convert?

If most of the people you share documents with are using pre-2007 versions of Word, it's a good idea to keep their documents in Compatibility Mode. This ensures that documents will look the same in Word 2016 as they do in the older version. It also ensures that the features available in Word 2016 will be limited to, or similar to, the features available in older versions.

### Choosing a Conversion Method

If you are working with a Compatibility Mode document that would benefit from the full functionality of Word 2016 features that are currently disabled or limited, you have a candidate for conversion. When you convert the document, Word 2016 turns on the new and enhanced features.

There are two ways to convert an older version (.doc) document to a Word 2007-2016 (.docx) document:

- **Convert:** The Convert command appears on the Info screen in Backstage view when a document is open in Compatibility Mode. Using the command performs a conversion that overwrites the original document. As a result, the older version document is no longer available.
- **Save As:** When you resave and rename a document using the Save As command, you are actually making a *copy* of the document. When you perform a Save As with a Compatibility Mode document, you still have the original .doc file, and you create a new second file, a .docx file.

☰ File→Info→Convert

☰ File→Save As

### Consider the User

Always keep the person who sent you the document or the person to whom you are sending a document in mind before converting. If you are editing a document that needs to be returned to someone who is using an earlier version of Word, leave the document in its original format rather than converting it.


### The Office Compatibility Pack

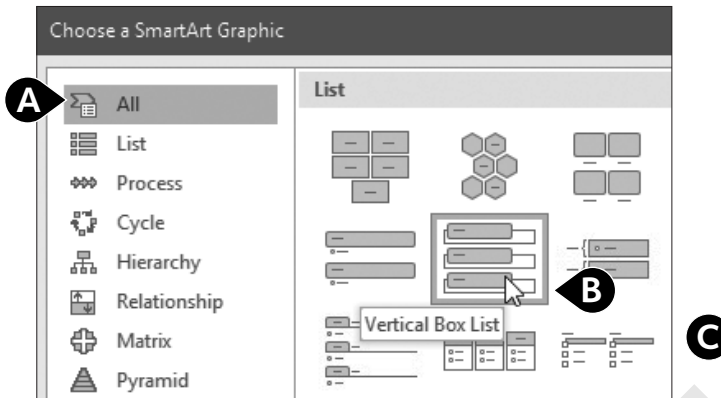
People who have earlier versions of Word and who need to work with Word 2016 documents can download a free compatibility pack from the Microsoft website to open, edit, and save Word 2016 documents. However, some features will still not be available.

## DEVELOP YOUR SKILLS: W2-D2

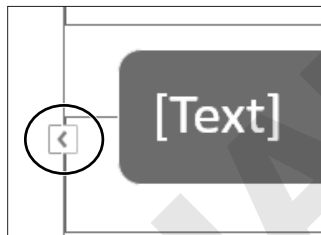
*In this exercise, you will convert a Word 2003 document to the .docx format and then add a Word 2016 SmartArt graphic.*

1. Save your file as **W2-D2-2003ProcManRevised**.
2. Choose **File→Info→Convert**.
3. Click **OK** to acknowledge the message.
4. Position the insertion point on page 2 at the beginning of the first paragraph below the *Scope of Services* heading and make sure the insertion point is to the left of the tab that begins that paragraph.

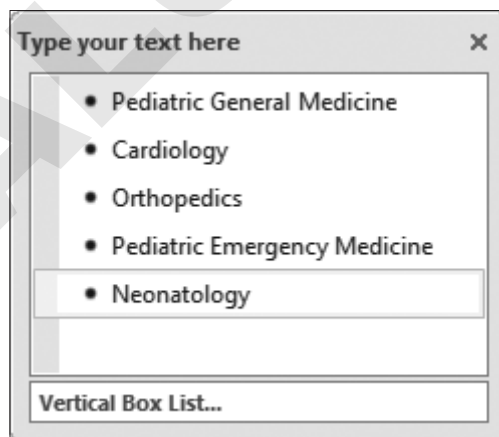
5. Tap **Enter** and then position the insertion point next to the paragraph mark for the blank line you just created.
6. Choose **Insert**→**Illustrations**→**SmartArt** .
7. Follow these steps to insert a SmartArt graphic:



- A Choose **All** from the category list.
  - B Choose the **Vertical Box List** graphic.
  - C Click **OK**.
8. If necessary, click the tab at the left side of the graphic to open the Type Your Text Here pane.



9. Type the text shown:



10. Close  the Type Your Text Here pane.

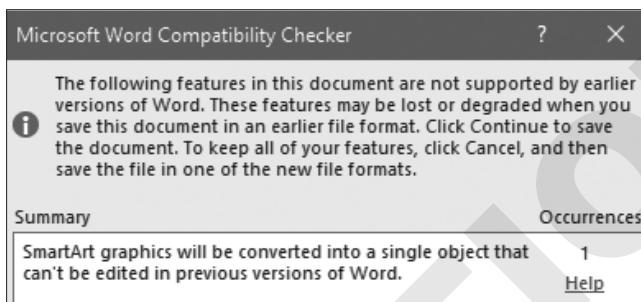
11. Save the document.

## Preparing Backward-Compatible Documents

If you know that you'll be working with people who have older versions of Word, and if it's important that all features are compatible among the versions, you might start your new document by saving it as a Word 97–2003 document. That way, you avoid using features unavailable in older versions.

### The Compatibility Checker

If you save a Word 2016 document down to an older Word version, the Compatibility Checker notifies you if the document contains features unique to newer versions of Word. You can also manually run the Compatibility Checker before saving the document in older versions.



The Compatibility Checker alerts you to how Word 2016 features will be handled if you save a document to an earlier version of Word.

 File→Info→Check for Issues→Check Compatibility

### Round-Tripping Documents

Round-tripping is a term that you may hear as you work with documents created in various versions of Word. Round-tripping refers to the practice of converting a document to a different format and then saving it back to the original format. For example, you may open a Word *.doc* file, convert it to a *.docx* file, and then decide to save your changes back to a *.doc* format. Round-tripping can create issues with the document that corrupt it so that it acts strangely or is damaged beyond repair.

### The Accessibility Checker

The Accessibility Checker checks elements of the document that people with disabilities may find difficult to read and informs you of the issues so you can fix them. The checker issues errors, warnings, and tips.

- **Errors:** Elements of the document may be very difficult or impossible to understand.
- **Warnings:** Elements of the document may be difficult to understand.
- **Tips:** Elements of the document may be better organized for understandability.

Clicking an item in one of these categories will provide information on changing the content to make it more accessible. There is also a link to Help text that describes in detail what you can do to make documents more accessible.

☰ File→Info→Check for Issues→Check Accessibility

### DEVELOP YOUR SKILLS: W2-D3

*In this exercise, you will begin the process to save a Word 2016 document to a Word 97–2003 format version for people who have not yet upgraded. Then you will check for accessibility issues.*

1. Choose **File**→**Save As** and navigate to your **Word Chapter 2** folder.
2. Click the **Save as Type** drop-down list, choose **Word 97–2003 Document**, and click **Save**.
3. Click **Cancel**.
4. Choose **File**→**Info**→**Check for Issues**→**Check Accessibility** to open the Accessibility Checker task pane.
5. Click the **Read More About Making Documents Accessible** link at the bottom of the task pane to display the Help window.
6. Click the **Creating Accessible Word Documents** link to view the content and then close the Help window and the task pane.

## Document Properties and the Document Inspector

Valuable information about a document appears in the Properties panel in Backstage view. Among the data Word stores within a document are the author's name, dates for file creation and editing, and the file storage location. Sending this data along with a document can inadvertently reveal to recipients some data that you would rather protect.

If you intend to share a document with colleagues or clients, you may use the Document Inspector to ensure that it contains no hidden or personal information either in the document itself or in the document properties. For example, a document could contain comments and tracked changes that are hidden from view. Document properties could contain information such as the author's name and the company name.

The Document Inspector will display a list of issues found in a document. The only option for removing data for a category is to remove all data within that category. Sometimes you may want to manually review information before deciding which data to remove.

☰ File→Info→Properties

☰ File→Info→Check for Issues→Inspect Document

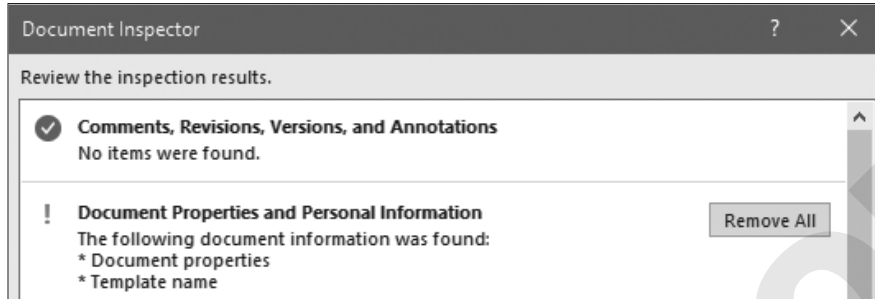
### DEVELOP YOUR SKILLS: W2-D4


*In this exercise, you will view document properties and run the Document Inspector. You will remove all personal data from the document.*

1. Save your file as **W2-D4-2003ProcManRevised**.
2. Choose **File**→**Info** and review the properties information in the panel on the right.



3. Right-click the author's name and choose **Remove Person**.
4. In the Info window, click **Check for Issues** and then choose **Inspect Document**.
5. If prompted to save changes, click **Yes**.
6. Click **Inspect** at the bottom of the dialog box and review the results.



7. Click **Remove All** to the right of Document Properties and Personal Information and then click **Close**.
8. Choose **File**→**Info** and notice that, in the Properties panel, all names associated with the document have been removed.
9. Click **Back**  and save the file.


## Controlling Document Access

When you share documents with colleagues and clients, it can be helpful to control the changes that others can make. There are several features to assist you with protecting documents. For example, you can restrict the kinds of formatting and editing changes a reviewer can make. You can add a password to a document, and you can mark a document as final, thereby discouraging changes to it.

### Restrict Editing

The Restrict Editing feature enables you to limit editing changes reviewers can make. You also have the option to further limit access with a password.

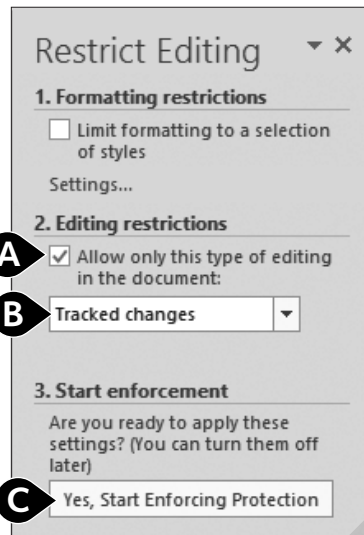
- **Restrict for Tracked Changes:** This setting protects a document from having Track Changes disabled. Every change to the document will be noted. In addition, no one can accept or reject changes while the document is protected.
- **Restrict for Comments:** This setting permits reviewers to insert and edit comments in the document but not to edit the document itself.
- **Restrict for Filling in Forms:** This setting permits users to insert data only in unrestricted areas of a form.




 File→Info→Protect Document→Restrict Editing

## DEVELOP YOUR SKILLS: W2-D5

In this exercise, you will set editing restrictions to allow tracked changes, thus preventing reviewers from disabling the feature.

1. Save the file as **W2-D5-2003ProcManRevised**.
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing** to open the Restrict Editing task pane.
3. Follow these steps to turn on document protection for Tracked Changes:



- A Ensure this checkbox is checked.
- B Ensure **Tracked Changes** is chosen here.
- C Click **Yes, Start Enforcing Protection**.
4. Click **OK** to dismiss the password dialog box.
5. On page 2, delete *of Services* in the *Scope of Services* heading.
6. Click **Stop Protection** at the bottom of the Restrict Editing task pane.
7. Click **Close**  in the upper-right corner of the Restrict Editing task pane.
8. Choose **Review**→**Changes**→**Next**  and then **Accept**  the change.
9. Click **OK** when the message appears.
10. Save the file.

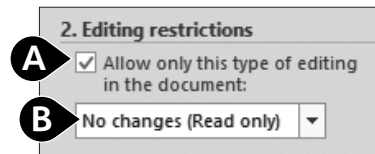
## Allow Changes to Part of a Document

If you choose No Changes (Read Only) in the Editing Restrictions list, the Exceptions option appears where you can specify certain areas of the document that a person can edit freely. For example, if a document is in its final version except for one section, you can exempt the incomplete section of the document so that it can be edited. You can also choose the people you want to allow to edit.

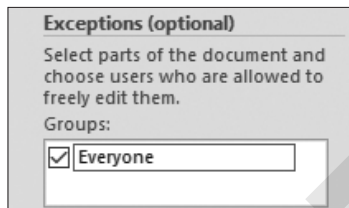
## DEVELOP YOUR SKILLS: W2-D6

In this exercise, you will specify the document as read-only; however, you will apply an exception to three paragraphs so reviewers can make changes to them.

1. Save your file as **W2-D6-2003ProcManRevised**.
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to restrict editing:



- A Make sure a checkmark appears here.
  - B Set the restriction level to **No Changes (Read Only)**.
4. Scroll to page 3 and select the three paragraphs below the *Entry into Services* heading.
5. Place a checkmark in the **Everyone** checkbox under Exceptions (Optional).



6. Click **Yes, Start Enforcing Protection** at the bottom of the task pane.
7. Click **OK** to bypass setting a password.
8. Click to deselect the paragraphs.
9. Select a word anywhere there is no shading and tap **Delete**.
10. Delete the third paragraph in the shaded area.
11. Click **Stop Protection** at the bottom of the task pane.
12. Select the two remaining shaded paragraphs and then remove the checkmark from the **Everyone** checkbox in the task pane.
13. Click in the document and notice the shading has been removed.
14. Save the file.

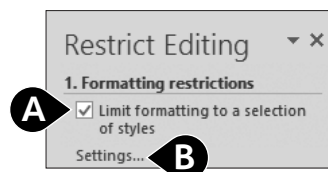
## Restrict Formatting

When you share a document with multiple reviewers, it's easy to imagine a jumble of formats if there are no restrictions. You can restrict reviewers to applying only the Word styles you choose. Formatting is restricted to a list of specified styles, thus providing formatting consistency and preventing anyone from indiscriminately formatting the document.

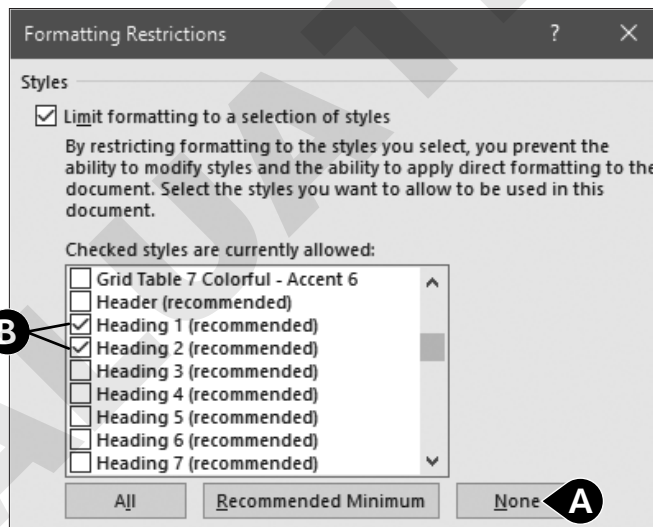
### DEVELOP YOUR SKILLS: W2-D7

In this exercise, you will use the Restrict Editing task pane to apply formatting restrictions.

1. Save your file as **W2-D7-2003ProcManRevised**.
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to open the Formatting Restrictions dialog box:

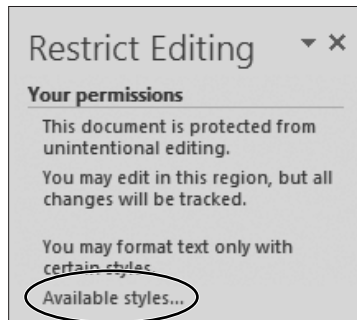


- A Place a checkmark here.
  - B Click the **Settings** link.
4. Follow these steps to set specific restrictions:



- A Click **None** to uncheck all of the checkboxes at once.
- B Scroll down and place checkmarks in the **Heading 1** and **Heading 2** checkboxes.

5. Click **OK**, and when Word displays a message asking if you want to remove other styles, click **No**.
6. In section 2 of the Restrict Editing task pane, remove the checkmark next to **Allow Only This Type of Editing in the Document**.
7. Click **Yes, Start Enforcing Protection** in the Restrict Editing task pane.
8. Click **OK** to dismiss the password dialog box.



9. Click the **Available Styles** link to display the Styles task pane.
10. Scroll to the top of page 2 and apply the **Heading 1** style to Our Mission.
11. Close the Styles task pane and then display the **Home** tab.
12. Click **Stop Protection** at the bottom of the Restrict Editing task pane and then close the task pane.
13. Save the file.

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## Passwords and Encryption



By using commands on the Backstage view Info screen, you can set an additional password that is required to open the document. If you use both passwords, the reviewer would need a password to open the document and another password to edit it.

Adding a document password also encrypts the document. Encryption means Word alters information using a code or mathematical algorithm so the information is inaccessible to unauthorized readers. When you encrypt a document, Word prompts you for a password. Note that passwords are case-sensitive.

☰ File→Info→Protect Document→Encrypt with Password

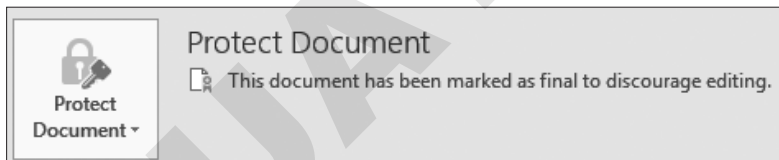
## DEVELOP YOUR SKILLS: W2-D8

In this exercise, you will set a document password and then remove it.

1. Choose **File**→**Info**→**Protect Document**→**Encrypt with Password**.
2. Type **pass** in the Encrypt Document dialog box and click **OK**.
3. Type **pass** in the Confirm Password dialog box and click **OK**.
4. Click **Back**  and then save and close the document.
5. Choose **File**→**Open** and click **W2-D7-2003ProcManRevised** at the top of the Recent Document list.
6. Type **pass** in the password box and click **OK**.
7. Choose **File**→**Info**→**Protect Document**→**Encrypt with Password**.
8. Select the characters in the password field, tap **Delete**, and then click **OK**.
9. Click **Back**  to return to the document and then save the file.

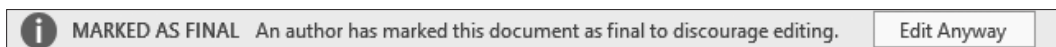
## Marking a Document as Final

Another way to control edits and access to content is to mark the document as “final.” Using the Mark as Final command makes a document read-only. As a result, readers and reviewers will know that this document appears as it did when it went to a client, was filed electronically, or was in some other way beyond the point where edits would be useful. Marking as final also prevents accidental altering of the document. When a document is marked as final, the following message appears in the Info tab in Backstage view.



## Editing Documents Marked as Final



When the Marked as Final feature is turned on, a yellow bar appears at the top of the document. The message in the bar lets you know that the document has been marked as final to discourage editing, and the Ribbon is hidden. Note that the feature only *discourages* editing. It is not as secure as a password would be. The button in the message bar enables you to edit the document anyway.



**File**→**Info**→**Protect Document**→**Mark as Final**

**DEVELOP YOUR SKILLS: W2-D9**

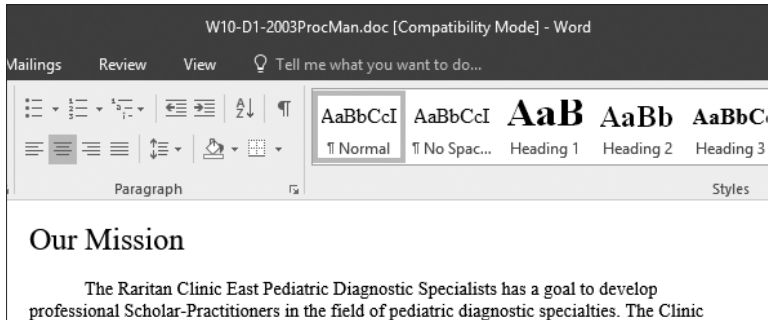
*In this exercise, you will mark a document as final and then remove the designation to re-enable editing.*

1. Choose **File**→**Info**→**Protect Document**→**Mark as Final**.
  2. When Word displays a message that the document will be marked as final and saved, click **OK**.
  3. Take a moment to read the information and then click **OK**.
  4. Click **Back**  to return to the document.
  5. Select the heading *Our Mission* on page 2.
  6. Tap  and see that the text is not deleted.
  7. Choose **File**→**Info**→**Protect Document**→**Mark as Final** to turn off the feature.
  8. Click **Back**  and notice that the Marked as Final bar at the top of the screen has disappeared.
  9. Save and close the file and then exit Word
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# Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. This image shows a document in Word 2016 that was created in Word 2010 or earlier. True False



2. An encrypted document always prompts for a password. True False
3. It's possible to add a password that allows a reviewer to open but not modify a document without a different password. True False
4. A document created in a version of Word prior to 2013 cannot be converted to Word 2016. True False
5. Round-tripping can corrupt a document and should be avoided whenever possible. True False
6. Marking a document as final prevents anyone from editing the document. True False
7. The Accessibility Checker checks whether or not a document needs a password to be accessible. True False
8. Passwords are NOT case-sensitive. True False
9. Using the Document Inspector reveals whether the document contains hidden or personal information. True False
10. If most of the people you share a document with are using pre-2007 versions of Word, it's a good idea to keep their documents in Compatibility Mode. True False
11. What are the two methods of converting Compatibility Mode documents?
- Office Compatibility Pack and Save As
  - Compatibility Checker and Convert
  - Save As and Convert
  - Convert and Office Compatibility Pack
12. Applying exceptions in the Editing Restrictions section of a task pane ensures which of the following?
- No portion of the document can ever be edited.
  - Word styles can be used in a document.
  - Specified areas of a document can be edited.
  - A document is read-only.

(continued)



13. If you save a Word 2016 document down to an earlier version, why might the Compatibility Checker appear?
- A. To allow you to choose which Word 2016 features to retain
  - B. To prevent you from converting the document
  - C. To explain how certain Word 2016 elements will be handled after the conversion
  - D. To save the document in Word 2016 mode
14. Why would you set formatting restrictions?
- A. To make a document read-only
  - B. To allow bold and italics only
  - C. To allow only specific Word styles to be applied to the document
  - D. To allow tracked changes

EVALUATION ONLY

EVALUATION ONLY

WORD 2016

# Personalizing Word

**A**s a Word user, you can increase productivity by customizing the application to work the way you want it to work. You can modify Word options and document properties to meet your needs. You can also automate repetitive tasks by recording macros. In this chapter, you will work with Word options, document properties, and macros to enhance the way you work.

## LEARNING OBJECTIVES

- Customize Word options
- Modify document properties
- Create and run macros

## CHAPTER TIMING

- Concepts/Develop Your Skills: 1 hr 30 mins
- Self-Assessment: 20 mins
- Total: 1 hr 50 mins

## PROJECT: SETTING UP WORD TO WORK THE WAY YOU DO

You have been working with Raritan Clinic East for several months. By examining the types of documents you have created during this time, you have some ideas for setting up Word to make it more efficient. You have learned that most documents are saved in folders in a specific location, and you want to set the default directory to access your main folder. You plan to pin documents you use all the time to the Recent Documents list so they are always at the top of the list, and you have discovered that using document properties can be helpful in searching for files located in a large group of files. You have also identified tasks that you perform repeatedly and terms that you type over and over that you will automate.

# Setting Word Options

The Word Options dialog box contains numerous options that enable you to control the way Word acts. In the Save category, you can change the AutoRecover time interval and identify the default folder you want to use to store files. You can use the Advanced category to set the number of documents that appear in the Recent Documents list.

☰ File→Options

## Changing the AutoRecover Interval and Default File Location

If you are concerned about power failures or are working on an important document, you may wish to reduce the amount of time between automatic saves. Your documents are saved every ten minutes by default.

When Word and other Office programs are installed on a computer, default file locations are set up. The default save location is your OneDrive. If you want to save to a local computer, you can change the save location and reduce the time it takes to navigate to that location. The new save location applies to new, unsaved documents. A document that was previously saved will default to the folder in which it was originally saved.

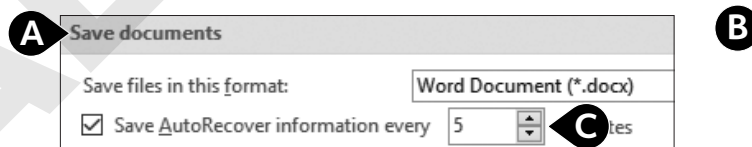
☰ File→Options→Save→Save AutoRecover Information Every x Minutes

☰ File→Options→Save→Default Local File Location

### DEVELOP YOUR SKILLS: W3-D1

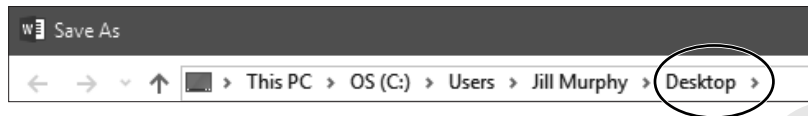
*In this exercise, you will set the AutoRecover time interval to five minutes. Then you will change the default file location where files are saved.*

1. Start Word, open **W3-D1-DraftProc** from your **Word Chapter 3** folder, and save it as **W3-D1-DraftProcRevised**.
2. Choose **File→Options** and click the **Save** category on the left.
3. Follow these steps to change the AutoRecover interval:



- A Locate the **Save Documents** section at the top of the dialog box.
  - B Write down the current AutoRecover interval so you can reset it later.
  - C Use the spin box controls to set the time to **5** minutes.
4. In the same section of the dialog box, check the **Save to Computer by Default** checkbox.

5. To specify a particular folder, click the **Browse** button to the right of the Default Local File Location field.
6. In the Modify Location dialog box, scroll in the left column to **Desktop** and then click **OK** twice.
7. Press **Ctrl** + **N** to start a new, blank document.
8. Choose **File**→**Save As** and notice that *This PC* is highlighted rather than OneDrive.
9. Click the **Browse** button at the bottom of the Save As panel on the left.



10. Click **Cancel** to close the Save As dialog box and then click **Close** in the left panel to close the blank document.

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## Modifying the Recent Document List

The Open screen in Backstage view displays a list of recent documents accessed on the computer. By default, the Recent Documents list shows the last twenty-five documents opened on the computer. When a document appears in this list, you can open it by clicking the document name. You can turn off the feature so that no documents are listed or change the number of documents shown in the list.

If you move a document to a different folder using an application such as Windows Explorer, the link to the document in the Recent Documents list is broken. After moving a document, you need to re-navigate to the new location to open the file.

### Changing the Number of Files in the Recent Documents List

When you work with only a few documents, the documents you need will always appear in the Recent Documents list. If you find that you primarily work with the last few documents before moving on to new documents, you may want to change the number of documents shown to reduce the number of documents you have to select from. Setting the number of documents to display in the list is controlled by settings in the Word Options dialog box. Settings range from zero to fifty.



View the video “Set the Number of Recent Documents to Display.”

☰ File→Options→Advanced→Show This Number of Recent Documents

### Pinning a File to the Recent Documents List

Periodically, you may find yourself modifying a document over an extended period of time. To ensure that the document always appears in the Recent Documents list, you can pin it to the list. Pinned documents appear at the top of the list and remain in the list regardless of how many additional documents you access.



View the video “How to Pin a File to the Recent Documents List.”

## Clearing the List of Recently Used Documents

Workers who perform tasks associated with specific projects might enjoy the ability to clear all unpinned items from the Recent Documents list, thus displaying only the documents they purposely pinned. In addition, if you are using a computer you share with others, you may want to clear the list so others won't have easy access the documents you used, especially if you work with confidential documents.

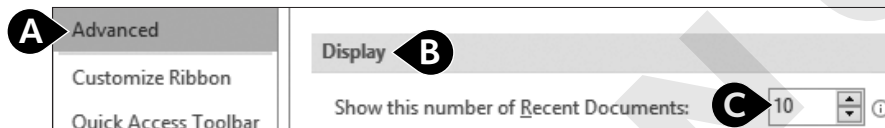


View the video “Setting the Recently Used List to Zero.”

### DEVELOP YOUR SKILLS: W3-D2

*In this exercise, you will change the number of documents that appear in the Recent Documents list. You will also pin a document to the list.*

1. Choose **File**→**Options** and then follow these steps to change the number of documents shown in the Recent Documents list:



- A Choose the **Advanced** category.
  - B Scroll down to the **Display** options.
  - C Write down the value in this box and then change the number of documents to **10**.
2. Click **OK** and then choose **File**→**Open** and note that a maximum of ten documents appear in the Recent Documents list. (Your list may have fewer than ten documents.)
3. Right-click any document in the list and notice (but don't click) the Clear Unpinned Documents command.
4. Tap **[Esc]** to close the menu.
5. Right-click any document in the list and choose **Pin to List**.
6. Click the pushpin icon of the document you just pinned to unpin it.
7. Click **Back** to return to the document window.

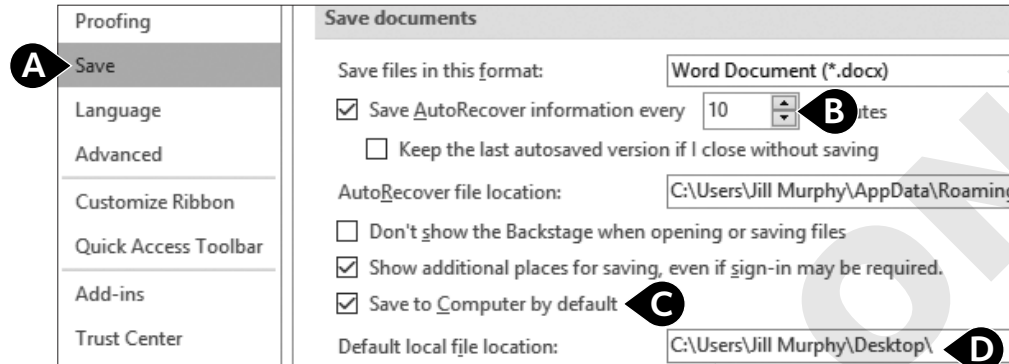
## Restoring Default Settings

Setting custom options for the way you work is a great practice for a computer that is assigned to you. However, when you are working on a computer you share with others, it is generally a good idea to restore the default settings you have changed.

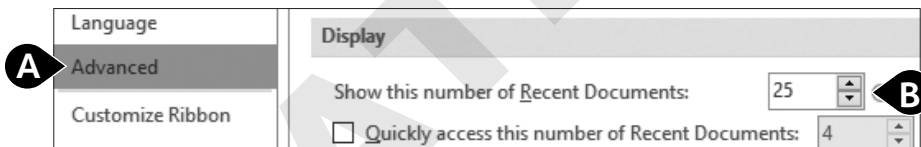
## DEVELOP YOUR SKILLS: W3-D3

In this exercise, you will restore the default settings in the Word Options dialog box. By restoring the options to their original state, you also will review the features just covered.

1. Choose **File**→**Options** and then follow these steps to restore your AutoRecover interval:



- A Choose the **Save** category.
  - B Reset the AutoRecover duration to **10** or to what it was before you made the change.
  - C Uncheck this box if it was previously unchecked.
  - D Enter the original file location path.
2. Follow these steps to restore your Recent Documents list:



- A Choose the **Advanced** category.
  - B In the Display section, reset the number of recent documents to **25** or to what it was before you made the change.
3. Click **OK**.

## Document Properties

Each time you create a new document, properties information is pulled from options set on your computer as well as information detected about the document. Properties information appears in the Properties panel of the Info screen in Backstage view. Information includes such items as the size of the file, the date on which it was created/modified, and the author's name. The Advanced Properties feature contains more data about your document, and this is where you can create custom properties.

The Advanced Properties dialog box contains the widest array of properties.

Entering information in the Properties panel also populates fields in the Advanced Properties dialog box.

Checking the “Thumbnails” checkbox fills in the Contents tab with headings (Heading 1 through Heading 3 styles) that appear in the document.

Following are descriptions of the tabs in the Advanced Properties dialog box:

- **General:** Contains some of the same information as the Properties panel in Backstage view, as well as additional information, including location and file attributes, such as Read Only
- **Summary:** Contains the same text boxes as the Properties panel, including Title, Keywords (Tags), and Comments; checking the Save Thumbnails for All Word Documents checkbox fills in the Contents tab with headings (Heading 1 through Heading 3 styles) that appear in the document
- **Statistics:** Contains many of the same statistics as the Properties panel in Backstage view as well as additional fields, such as Paragraphs, Lines, and Characters
- **Contents:** Contains the document headings (Heading 1 through Heading 3 styles) when the Save Thumbnails for All Word Documents checkbox is checked on the Summary tab
- **Custom:** Allows you to define additional fields, which can be useful when searching for a document in a large group of documents



## DEVELOP YOUR SKILLS: W3-D4

In this exercise, you will add comments and keywords (tags) to the procedures manual.


1. Save your file as **W3-D4-DraftProcRevised**.
2. Choose **File**→**Info** and review the document properties in the Properties panel on the right side of the screen.
3. Enter the information shown in the **Title**, **Tags**, and **Comments** fields and then enter your name in the **Author** field.

The screenshot shows the 'Properties' panel in Microsoft Word. The following information is visible and circled:

- Title:** Draft Procedures Manual
- Tags:** Staff, Nurses, Aids, Doctors
- Comments:** Sent for review early in April.
- Author:** Jill Murphy

Other visible information includes:

- Size:** 35.9KB
- Pages:** 7
- Words:** 2150
- Total Editing Time:** 0 Minutes
- Related Dates:** Last Modified (5/3/2016 3:02 PM), Created (5/3/2016 11:43 AM), Last Printed
- Related People:** Add an author
- Last Modified By:** Not saved yet

4. Click the **Properties** heading/button at the top of the Properties panel and then click **Advanced Properties**.
5. Click **OK** and then click **Back**  to return to the document.
6. Save the file.

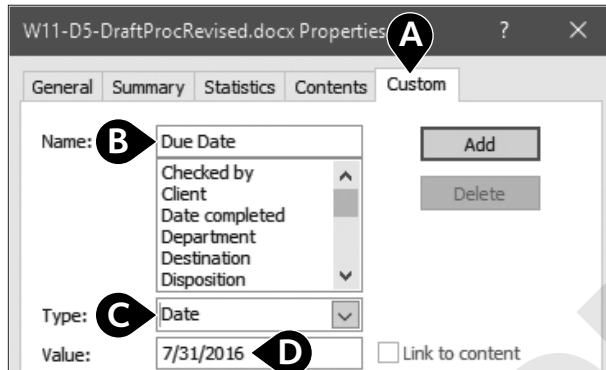
## Creating a Custom Property

Though the available properties are sufficient for most documents, there may be times when you want to store additional properties. When there is no existing property to meet your needs, you can create a custom property and define the type of data you plan to place in the field, including Text, Date, and Number. A list of suggested names is provided for custom fields, but you can also define your own property names. For example, if you want to include a due date for a document, you can create a new Due Date property and assign Date as the data type. These custom properties don't appear in the Properties panel in the Backstage Info view. To view them, you need to refer to the Custom tab of the Advanced Properties dialog box.

## DEVELOP YOUR SKILLS: W3-D5

In this exercise, you will create a custom property for the procedures manual to hold the due date for the final version of the document.

1. Save your file as **W3-D5-DraftProcRevised**.
2. Choose **File**→**Info**, click **Properties** at the top of the Properties panel, and choose **Advanced Properties**.
3. Follow these steps to create a new custom property:



- A Click the **Custom** tab.
  - B Type **Due Date** in the Name field.
  - C Select **Date** from the Type list.
  - D Type **7/31/2016** in the Value field and then click **OK**.
4. Save and close the document.

## Automating Tasks with Macros

Macros are useful for automating routine tasks, especially those that involve many steps. You can record a series of steps using the macro recorder, and then play them back automatically when needed. For example, you may need to switch to a color printer frequently. You can record the steps of the process in a macro, and, when it's time to switch printers, the macro can quickly perform the steps. Whenever you find yourself doing the same thing over and over, you have a candidate for a macro.

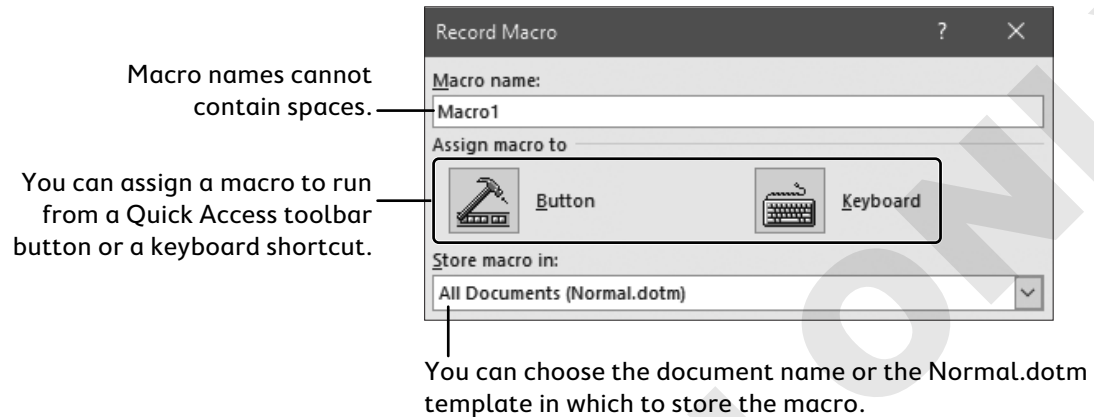
☰ View→Macros→Macros

### Assign Macros to a Toolbar or a Keyboard Shortcut

If you intend to use a macro frequently, you can assign it to a keyboard shortcut or a button on the Quick Access toolbar for easy access. This is not required, though. You can always run a macro directly from the Macros dialog box.

## Store Macros

Macros can be stored in documents or templates, including the Normal.dotm template, which is the default. The *m* in the *.dotm* file extension indicates the template can contain macros. Macros stored there are available to all documents on the system.



## Recording Limitations

Certain mouse motions such as scrolling, selecting options from drop-down lists, and resizing windows cannot be recorded in macros. You may also find that certain commands are grayed out on the Ribbon or in the drop-down list during the macro recording. You can overcome these limitations by choosing alternative techniques. For example, if selecting an item from a drop-down list doesn't record in a macro, display the dialog box containing the feature and make the selection there. Instead of scrolling in a document, use arrow keys to position the insertion point (keystrokes are recorded). Likewise, when selecting text with the mouse fails to record, try **[Shift]** plus arrow keys or other keyboard shortcuts.

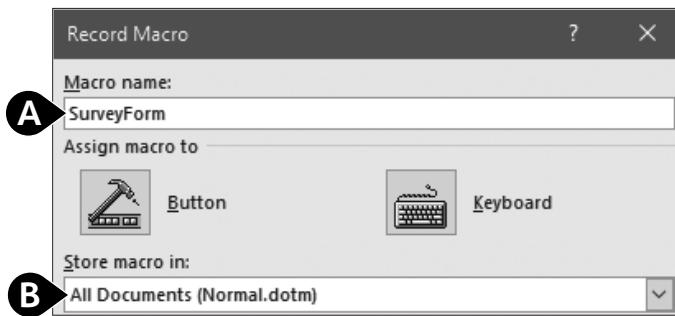
When you record a macro and change settings in a dialog box using arrow keys, the change normally sticks until you exit Word; this means the dialog box doesn't reset to its default state. As a result, running the macro again in the same session may change the setting to the *next* option in the dialog box.

### DEVELOP YOUR SKILLS: W3-D6

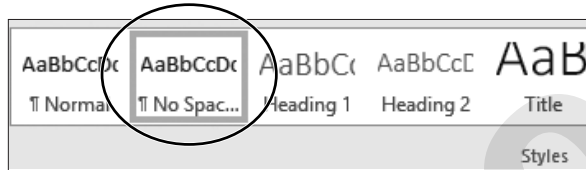
*In this exercise, you will record a macro that sets up the orientation, margins, and page size for a survey form. The macro will also insert and format text.*





1. Create a new, blank document.
2. Choose **View**→**Macros**→**Macros**  menu button ▼→**Record Macro**.

3. Follow these steps to name the macro and begin the recording process:

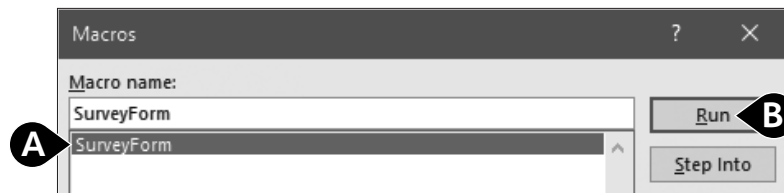


- A** Type **SurveyForm** (no spaces) in the Macro Name field.
  - B** Ensure that the storage location is the **Normal.dotm** template, which makes the macro available to all documents on your computer; click **OK**.
4. Choose **Home**→**Styles** and click the **No Spacing** style in the Quick Styles gallery.



- 5. Choose **Home**→**Font**→**Bold** **B**.
- 6. Type **Raritan Clinic East Pediatric Diagnostic Specialties**.
- 7. Choose **Layout**→**Page Setup**→**Orientation**  and then choose **Landscape**.
- 8. Choose **Layout**→**Page Setup**→**Margins**  and then choose **Custom Margins** at the bottom of the gallery.
- 9. Set the top and bottom margins to **0.4"** and the left and right margins to **0.5"**.
- 10. Click the **Paper** tab at the top of the dialog box and set the width to **7"** and the height to **5"**.
- 11. Click **OK** to apply the settings.
- 12. Choose **View**→**Macros**→**Macros**  menu button ▼→**Stop Recording**.
- 13. Close the document without saving it and then create a new, blank document.
- 14. Choose **View**→**Macros**→**Macros** .

15. Follow these steps to run the macro:



- A Choose your **SurveyForm** macro.
- B Click **Run**.

16. Close the document without saving it and then create a new, blank document.
- 

## Editing Macros with the VBA Editor

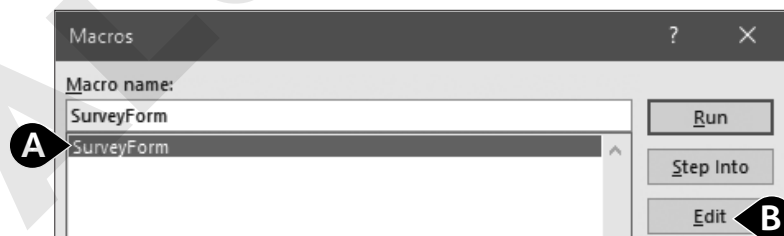
Visual Basic for Applications (VBA) is a macro programming language that runs in Office 2016 applications. When you record a macro, you are creating a Visual Basic module containing program instructions that execute when you run the macro. This topic provides a brief introduction to Visual Basic, but a complete discussion is beyond the scope of this course.

You can edit a macro by displaying the Visual Basic module and modifying the code. The editor has its own menus, toolbars, and commands, which allow you to develop, edit, and test Visual Basic applications.

### DEVELOP YOUR SKILLS: W3-D7

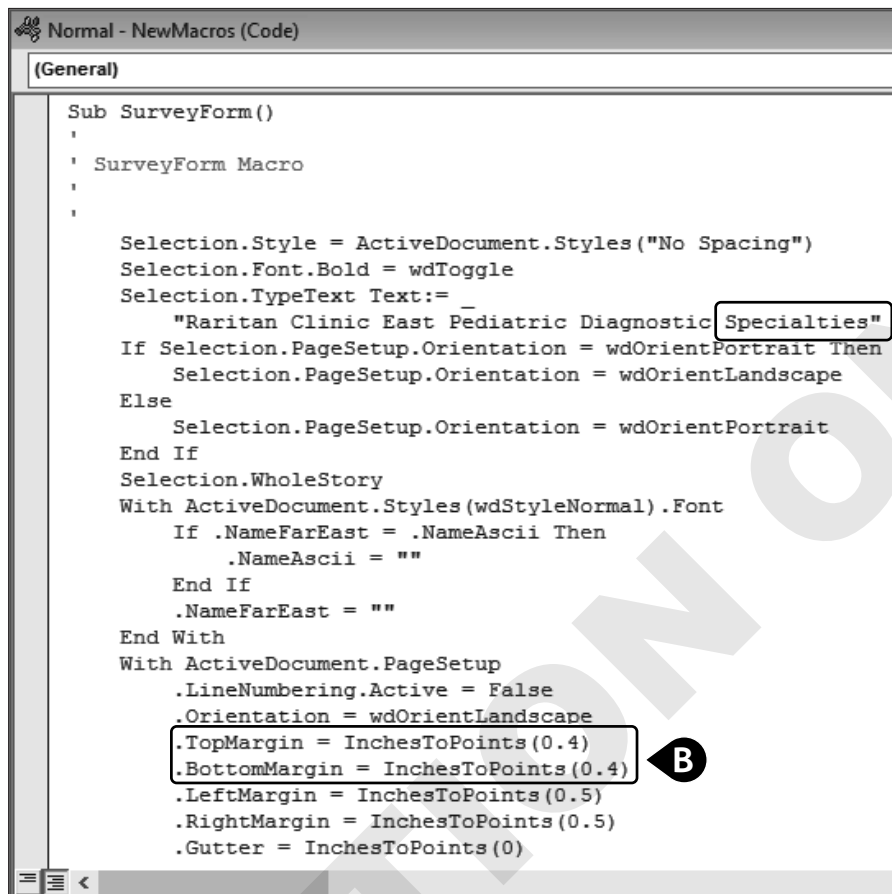
*In this exercise, you will open the Visual Basic editor and revise your macro. Then you will run the modified macro.*

1. Choose **View**→**Macros**→**Macros** .
2. Follow these steps to begin the editing process:



- A Choose your **SurveyForm** macro.
- B Click **Edit**.

3. Follow these steps to modify the code:





```

Normal - NewMacros (Code)
(General)

Sub SurveyForm()
'
' SurveyForm Macro
'
'
Selection.Style = ActiveDocument.Styles("No Spacing")
Selection.Font.Bold = wdToggle
Selection.TypeText Text:= _
    "Raritan Clinic East Pediatric Diagnostic Specialties"
If Selection.PageSetup.Orientation = wdOrientPortrait Then
    Selection.PageSetup.Orientation = wdOrientLandscape
Else
    Selection.PageSetup.Orientation = wdOrientPortrait
End If
Selection.WholeStory
With ActiveDocument.Styles(wdStyleNormal).Font
    If .NameFarEast = .NameAscii Then
        .NameAscii = ""
    End If
    .NameFarEast = ""
End With
With ActiveDocument.PageSetup
    .LineNumbering.Active = False
    .Orientation = wdOrientLandscape
    .TopMargin = InchesToPoints(0.4)
    .BottomMargin = InchesToPoints(0.4)
    .LeftMargin = InchesToPoints(0.5)
    .RightMargin = InchesToPoints(0.5)
    .Gutter = InchesToPoints(0)
End With

```

- A** Change the word *Specialties* to **Specialists**.
- B** Change the TopMargin and BottomMargin settings from 0.4 to **0.5**.
4. Choose **File**→**Close and Return to Microsoft Word**.
  5. Choose **View**→**Macros**→**Macros** , choose **SurveyForm** in the Macro Name list, and then click **Run**.
  6. Choose **Layout**→**Page Setup**→**Margins** →**Custom Margins**.
  7. Close the dialog box.
  8. Close the document without saving; create a new, blank document.

## Running Macros from the Quick Access Toolbar

When you create a macro to automate repetitive tasks, you are trying to increase efficiency. To make macros run more efficiently, you can assign them to a button on the Quick Access toolbar or to a shortcut keystroke. By taking advantage of these time-saving tools, you alleviate the tedious nature of displaying the Macros dialog box and selecting the macro each time you want to run it.

You can assign a toolbar button or keyboard shortcut to a macro as you record it. In addition, you can assign a toolbar button to an existing macro using the Quick Access toolbar commands in the Word Options dialog box. Word offers numerous button images that you can choose to help keep your macro buttons straight.

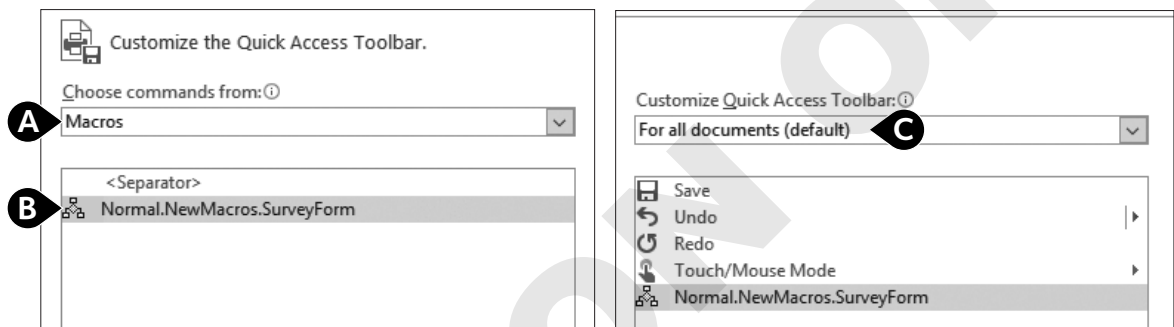


View the video “Assign a Macro to the Quick Access Toolbar.”

## DEVELOP YOUR SKILLS: W3-D8

In this exercise, you will assign the SurveyForm macro to a Quick Access toolbar button.

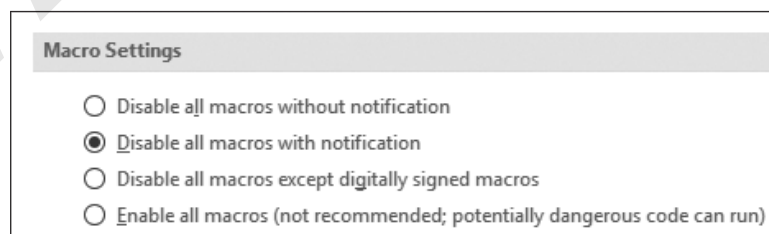
1. Choose **File**→**Options** and then click the **Quick Access Toolbar** category.
2. Follow these steps to assign a macro button to the Quick Access toolbar:



- A Choose **Macros** here.
  - B Select the **SurveyForm** macro.
  - C Ensure that **For All Documents (Default)** appears here.
3. Click the **Add** button in the middle of the dialog box to add the macro to the Quick Access Toolbar list and then click **OK**.
4. Hover the mouse pointer over the button to see the button name in a ToolTip; click the button to run the macro.

## Macro Security

Macro attacks were more prevalent in earlier versions of Microsoft Office. Added security features in recent versions have caused virus creators to pursue other avenues; however, it's always better to be safe than sorry. The Trust Center in the Word Options dialog box contains security settings.




MACRO SETTINGS OPTIONS	
Option	What It Does
Disable all macros without notification	Word disables all macros and does not notify users.
Disable all macros with notification	This is the default setting. It gives the user the option to enable or disable a macro.
Disable all macros except digitally signed macros	This option allows users to enable or disable only <i>digitally signed macros</i> .
Enable all macros (not recommended; potentially dangerous code can run)	This option significantly reduces security and could potentially cause serious damage.

## Deleting Macros

You may create a macro for use in a special project, and when the project is complete you no longer need the macro. Deleting a macro when it's no longer required helps keep the list of macros from becoming unwieldy.

### DEVELOP YOUR SKILLS: W3-D9

*In this exercise, you will review security settings and delete the macro you previously created. Finally, you will remove the macro button from the Quick Access toolbar.*

1. Choose **File**→**Options** and then choose the **Trust Center** category on the left.
2. Click the **Trust Center Settings** button and review the Macro Settings options at the top of the dialog box.
3. Click **Cancel** twice to close the dialog boxes.
4. Choose **View**→**Macros**→**Macros** .
5. Choose the **SurveyForm** macro in the Macro Name list, click **Delete**, click **Yes** to verify the deletion, and then close the dialog box.
6. Right-click the macro button and choose **Remove from Quick Access Toolbar**.
7. Exit Word without saving the document.



# Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. You use the Customize dialog box to assign macros to the Quick Access toolbar. True False
2. You can assign a macro to a keyboard shortcut. True False
3. VBA is a macro programming language. True False
4. The Macro feature records all Ribbon commands and mouse actions. True False
5. Pinned documents in the Recent Document list appear at the bottom of the list. True False
6. You can view a custom property on the Properties panel in Backstage view. True False
7. The Documents folder is the default location for saving files. True False
8. The Trust Center in the Word Options dialog box contains security settings. True False
9. You can record a series of steps for playback using the macro recorder. True False
10. Macro names cannot contain spaces. True False
11. Which of the following is NOT a source of information for document properties?
  - A. Options set on your computer
  - B. Custom properties you create
  - C. The Properties category in the Word Options dialog box
  - D. Information Word detects about your document
12. By default, new macros are stored in what template?
  - A. Normal.dotm
  - B. Custom
  - C. Network
  - D. Document
13. Which of the following features is NOT a document property?
  - A. File Size
  - B. Tracked Changes
  - C. Date Created
  - D. Author's Name
14. Which of the following cannot be used to run a macro?
  - A. Pressing
  - B. A Quick Access toolbar button
  - C. The Macros dialog box
  - D. A keyboard shortcut

EVALUATION ONLY

## WORD 2016

# Integrating Word with Excel, PowerPoint, and the Web

One advantage to using a suite of applications is that they are designed to share data and information and to work together seamlessly. You can display data stored in an Excel worksheet in a Word document or use Excel data as the source document in Mail Merge. You can send a Word outline to PowerPoint to create a new presentation or insert a PowerPoint presentation in a Word document. You can open a PDF file in Word and edit it, and you can convert a Word document to a web page. In this chapter, you will explore the features that allow Word to interact with other Office programs.

## LEARNING OBJECTIVES

- Embed and link Excel objects in Word
- Use an Excel worksheet as a Mail Merge data file
- Create PowerPoint presentations from Word outlines
- Insert PowerPoint presentations in Word documents
- Open a PDF file in Word for editing
- Convert Word documents to web pages

## CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs 30 mins
- Self-Assessment: 20 mins
- Total: 2 hrs 50 mins

## PROJECT: MULTITASKING WITH WORD, EXCEL, AND POWERPOINT

You are an administrative assistant at Raritan Clinic East. An advisory committee meets quarterly to review the budget and clinic activities. In preparation for the upcoming meeting, you will help create the quarterly expense report. The data is in an Excel worksheet, so you will use the Excel data in the report that you will prepare in Word. You will add the chart contained in the Excel file to the report and prepare a PowerPoint presentation using an outline of headings from the clinic's Annual Report. You will generate a letter to all committee members using an Excel name and address file to address the letters. Then you will edit a press release in Word that was saved in PDF format. Finally, you will save your report as a web page for posting on the clinic website for others to review.

# Embedding and Linking Excel Objects

You can share data and objects among the programs in the Office 2016 suite. Object is a term for an element that you share between files. For example, you can place data and chart objects from an Excel file in a Word document. You would choose to embed an object if you don't want it to change when the original source file is updated. On the other hand, if you want the Word document to stay current with any changes in the source file, you would link the object to its original file so your document will be updated when the source file is modified.

## Link or Embed Data

Whether you are embedding or linking to files, there are two techniques for inserting data from other files:

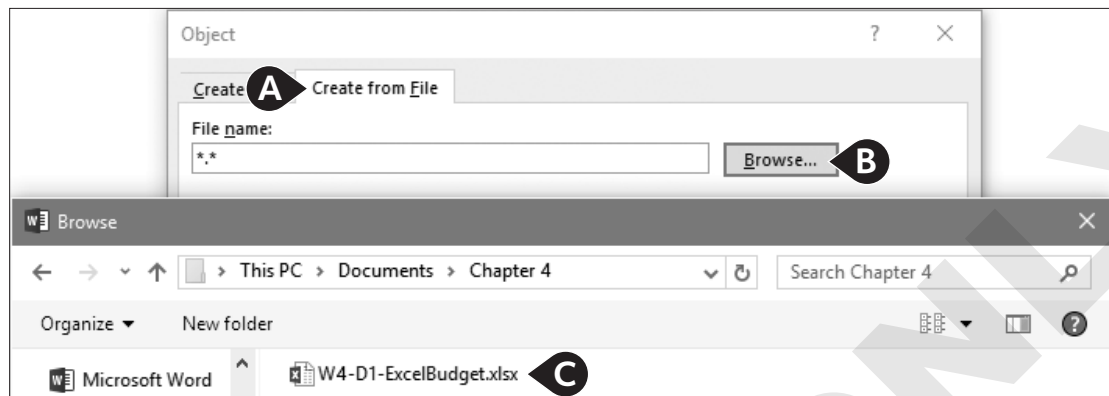
- **Copy/Paste:** Using this procedure, you copy data from a source document, such as an Excel worksheet, and paste it directly into the Word document. Using the Paste Special command, you can choose to link the data or not at the time you paste it. This method is useful when you want to include only a portion of the file.
- **Insert Object:** You can insert a file, such as an Excel workbook, from within Word, and you can choose to link the data or not at the time you insert it. This procedure is useful when you want to include an entire file in a document.

### DEVELOP YOUR SKILLS: W4-D1

*In this exercise, you will embed an Excel worksheet in a Word document and test its static nature.*

1. Start Word; create a new, blank document; and save it to your **Word Chapter 4** folder as **W4-D1-BudgetRpt**.
2. Type these heading lines:  
**Advisory Committee Budget Report**  
**Third Quarter 2016**
3. Tap  and then select both heading lines.
4. Choose **Home**→**Styles**→**More**  on the Quick Styles gallery and choose the **Title** style.
5. Position the insertion point in the blank line below the heading lines and type this introductory paragraph:  
**This report, produced by clinic staff, is in keeping with the Advisory Committee's decision to conduct quarterly reviews of the current year's budget. It provides a snapshot of expenses for the quarter and for the year-to-date.**
6. Tap  and then choose **Insert**→**Text**→**Object**.

7. Follow these steps to identify the Excel file from which to embed the data:




- A Click the **Create from File** tab.  
 B Click the **Browse** button and navigate to your **Word Chapter 4** folder.  
 C Double-click **W4-D1-ExcelBudget** and click **OK**.
8. Start Excel, open **W4-D1-ExcelBudget**, and save it in your **Word Chapter 4** folder as **W4-D1-ExcelBudgetRevised**.
9. Follow these steps to edit a value in the source file:

	A	B
1		Rarit
2		2016
3		Q1
4	Mortgage & Insurance	14,557
5	Utilities	15,201

	A	B
1		Rarit
2		2016
3		Q1
4	Mortgage & Insurance	10,000
5	Utilities	15,201

- A Click the cell for **14,557** (Q1, Mortgage & Insurance) and tap **Delete**.  
 B Type **10,000** and tap **Enter**.
10. Switch to Word and verify that the value of Q1 Mortgagee & Insurance remains 14,557.
11. Switch back to Excel and click **Undo**  twice to return the value to its original amount.
12. Switch back to Word, click the embedded worksheet to select it, and tap **Delete**.
13. Save the Word file and leave all files open.

## Link Objects

When you link data from another application, such as Excel or PowerPoint, to a Word document, the original information resides in Excel or PowerPoint. This is known as the source file because it is the source of the data. When you place the information (object) in a Word document, it becomes the destination file. By linking source files with Word documents, you create a dynamic tie between the two files.

For example, you might start working on a quarterly report before the end of the quarter, and, if there is a linked chart in the report, it updates with the current information as the numbers change in Excel. That way, updates are centralized, and you don't have to keep track of making changes in two places.



View the video “Inserting a Linked Object.”



View the video “Link an Object with Paste Special.”



View the video “Link an Object with the Paste Options Smart Tag.”

☰ Insert→Text→Object→Create from File→Link to File

## DEVELOP YOUR SKILLS: W4-D2

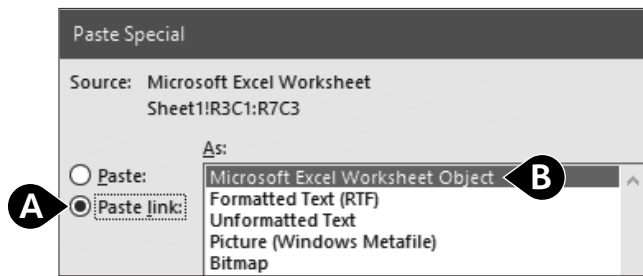
In this exercise, you will link Excel data to a Word document using *Paste Special*. You will then modify the Excel worksheet and observe how the changes update the Word document. Then you will link an Excel chart to the document using the *Paste Options* smart tag.

1. Save your file as **W4 - D2 - BudgetRpt.**
2. Switch to Excel and follow these steps to select and copy the Excel data:

Raritan Clinic East					
2016 Budget Summary					
	Q1	Q2	Q3	Q4	Totals
Mortgage & Insurance	14,557	14,557	14,557		43,671
Utilities	15,201	18,200	21,000		54,401
Food	5,480	4,512	3,452		13,444
Staff Salaries	87,685	87,685	87,685		263,055
Maintenance & Repairs	16,982	17,458	15,225		49,665
Fundraising for Donations	820	2,006	67,325		70,151
<b>Grand Totals</b>	<b>140,725</b>	<b>144,418</b>	<b>209,244</b>	<b>-</b>	<b>494,387</b>

- Click in the merged cell containing the heading *Raritan Clinic East*.
  - Press **[Shift]** and click the last cell in the worksheet, **494,387**.
  - Choose **Home→Clipboard→Copy**.
3. Switch to Word and position the insertion point at the end of the document.
  4. Choose **Home→Clipboard→Paste** menu button ▼→**Paste Special**.

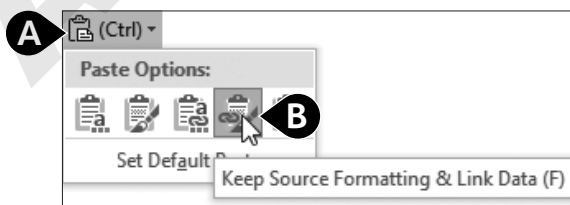
5. When the Paste Special dialog box opens, follow these steps to paste the object:



- A** Choose **Paste Link**.
  - B** Choose **Microsoft Excel Worksheet Object** and click **OK**.
6. Switch to Excel and tap **[Esc]** to remove the marquee (animated dashed line) surrounding the table.
7. Click **cell E4**, which is the Q4 cell for Mortgage & Insurance.
8. Type the Q4 projections shown, tapping **[Enter]** after typing each number.

Q4
11,337
1,750
4,975
17,685
2,543
1,529

9. Switch to Word. If the Excel table failed to update on your computer, right-click the **Excel object** and choose **Update Link**.
10. Position the insertion point at the end of the document and tap **[Enter]** three times.
11. Switch to Excel, click the **Sheet 2** tab at the bottom of the Excel window, and click the pie chart border once to select it.
12. Choose **Home**→**Clipboard**→**Copy** and then switch back to Word.
13. Choose **Home**→**Clipboard**→**Paste** .
14. Follow these steps to paste a link for the chart object:



- A** Click the **Paste Options** smart tag at the bottom of the chart.
- B** Click **Keep Source Formatting & Link Data**.



15. Save the Word file.
  16. Exit Excel, saving changes when prompted.
- 

### **Open Excel and Chart Tools from Word**

When data or objects from other sources are linked to Word documents, you can open source program tools directly from the Word document and use the tools to edit the object. Or, you can open the Excel application from within Word.

#### **DEVELOP YOUR SKILLS: W4-D3**

*In this exercise, you will launch Excel from within Word and edit data in the worksheet. Then you will use Live Preview with Excel Chart Tools on the Word Ribbon to view potential formatting changes.*

1. Save your file as **W4-D3-BudgetRpt**.
  2. Double-click anywhere in the Excel worksheet table object to open the Excel file.
  3. In Excel, click the Q1 cell for Staff Salaries (**cell B7**), type **1,000**, and tap **[Enter]**.
  4. Switch to Word and ensure that the data and chart both updated.
  5. Switch to Excel and click **Undo** .
  6. Switch to Word.
  7. If you did not use Chart Tools in the previous step, double-click the chart to display the Chart Tools on the Ribbon.
  8. Click the border of the chart to select the chart background.
  9. Choose **Chart Tools**→**Format**→**Shape Styles**→**Shape Fill**  **menu button** ▼.
  10. Hover the mouse pointer over several different colors to see Live Preview display the effects as they impact the chart area background color.
  11. Tap **[Esc]** to close the gallery and then tap **[Esc]** again to deselect the chart.
  12. Save and then close the Word file but leave the Excel file open.
- 

### **Updating and Breaking Links**

Linked objects in Word automatically update if the destination file is open at the time the source document changes. Naturally, the destination file is not always open when you modify the Excel source document; however, Word will prompt you to update links when you open a document containing links.

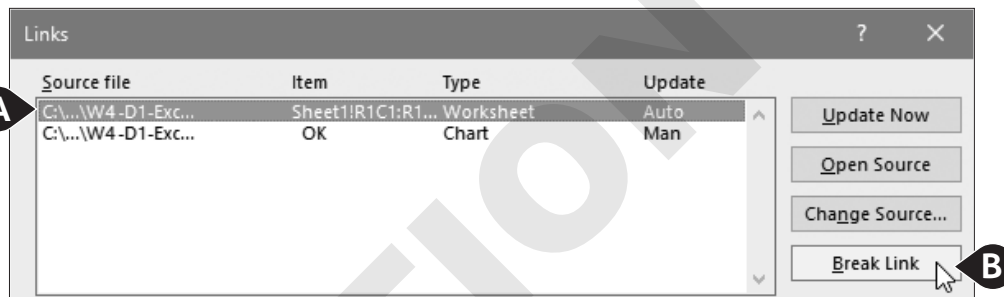
You can break the link between a linked object and its source document. Once the final figures for a period are in, you may want to break the link between Word and Excel so that the linked object is converted to an embedded object. Then, the Word report always reflects the closing numbers for that period.



## DEVELOP YOUR SKILLS: W4-D4

In this exercise, you will modify the linked Excel file and observe the prompt to update links when you open the Word document. Then you will break the links to the worksheet data and test to see that the links are broken.

1. In Excel, click **cell C4** (Mortgage & Insurance for Q2), type **50,000**, and tap **Enter**.
2. Open **W4-D3-BudgetRpt**, which contains the linked objects.
3. When the message appears prompting you to update links, click **Yes**.
4. Save the Word file as **W4-D4-BudgetRpt**.
5. In Word, right-click in the worksheet data to display a pop-up menu.
6. Slide the mouse pointer down to **Linked Worksheet Object** and choose **Links** from the submenu.
7. Follow these steps to break the link for the table:



8. When the message appears asking if you want to break the link, click **Yes**.
9. Click the **Break Link** button to break the link between Excel and the chart.
10. When the message box appears, click **Yes**.
11. Click **OK** to close the Links dialog box.
12. Right-click the worksheet object, review the menu options, and note that the Update Links option is gone.
13. Double-click the chart, choose **Chart Tools**→**Design**→**Data**, and notice that the Refresh Data button is grayed out, indicating that the link is broken.
14. Save and close the Word and Excel files but leave the program windows open.

# Using Excel as a Mail Merge Data Source

You may recall the Word's Mail Merge feature is most often used for generating personalized form letters. Word can use a variety of file types as data sources, including Excel files. Whether you type a new data-source list from within Word or create your data source in Excel, the rules for effective data sources apply.

The more data is split into small segments, the more flexibility you have in the merge. A rule to remember is that you cannot merge part of a field. If the name field, for example, contains the title, first name, and last name, you will not be able to use those elements separately. For instance, in the greeting line, you will not be able to drop the first name and use Dear Title Last Name.



In Excel, the columns are treated as separate fields in a mail merge. Therefore, in a name and address list, it is a good idea to place the title, first name, and last name in separate columns, as shown in the following illustration.

	A	B	C	D	E	F	G
1	<b>Title</b>	<b>First Name</b>	<b>Last Name</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
2	Ms.	Sally	Redding	756 Locust Street	Los Angeles	CA	91025
3	Mr.	Jose	Lopez	7812 Olive Road	Los Angeles	CA	91357
4	Mr.	Charles	Douglas	91 Sycamore Ave.	Los Angeles	CA	91642

☰ Mailings→Start Mail Merge→Select Recipients→Use an Existing List

## DEVELOP YOUR SKILLS: W4-D5

*In this exercise, you will begin by examining the Excel worksheet that you will use as the data source. Next you will open a letter and designate it as the main document. Then you will connect the Excel data source to the letter and conduct the merge.*

1. In Excel, open **W4-D5-CommAddress** from your **Word Chapter 4** folder.
2. Look at the bottom of the Excel worksheet and notice the tab labeled Sheet 1.
3. Exit Excel.
4. In Word, open **W4-D5-CommLtr** and save it as **W4-D5-CommLtrRevised**.
5. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge**  and then choose **Letters**.
6. If necessary, display formatting marks.
7. Choose **Mailings**→**Start Mail Merge**→**Select Recipients**  and then choose **Use an Existing List**.
8. Navigate to your **Word Chapter 4** folder and open **W4-D5-CommAddress**.

9. When the Select Table dialog box appears, notice that Sheet 1 is highlighted.
  10. Click **OK**.
  11. In the letter, select the **Today's Date** text; delete it but don't delete the paragraph symbol at the end of the line.
  12. Type the current date in its place.
  13. Select and delete the **Address Block** text but don't delete the paragraph symbol at the end of the line.
  14. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
  15. When the Insert Address Block dialog box appears, click **OK** to accept the default settings for the inside address.
  16. Delete the **Greeting Line** text but not the paragraph symbol at the end of the line.
  17. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line** .
  18. When the Insert Greeting Line dialog box appears, change the Greeting Line Format from a comma to a colon and click **OK**.
  19. Choose **Mailings**→**Finish**→**Finish & Merge**  and then choose **Edit Individual Documents**.
  20. When the Merge to New Document dialog box opens, click **OK** to merge all of the records from the Excel file.
  21. Turn off formatting marks and scroll through the letters to see the results of the merge.
  22. Close the merge document without saving it.
  23. Save and close **W4-D5-CommLtrRevised**.
- 

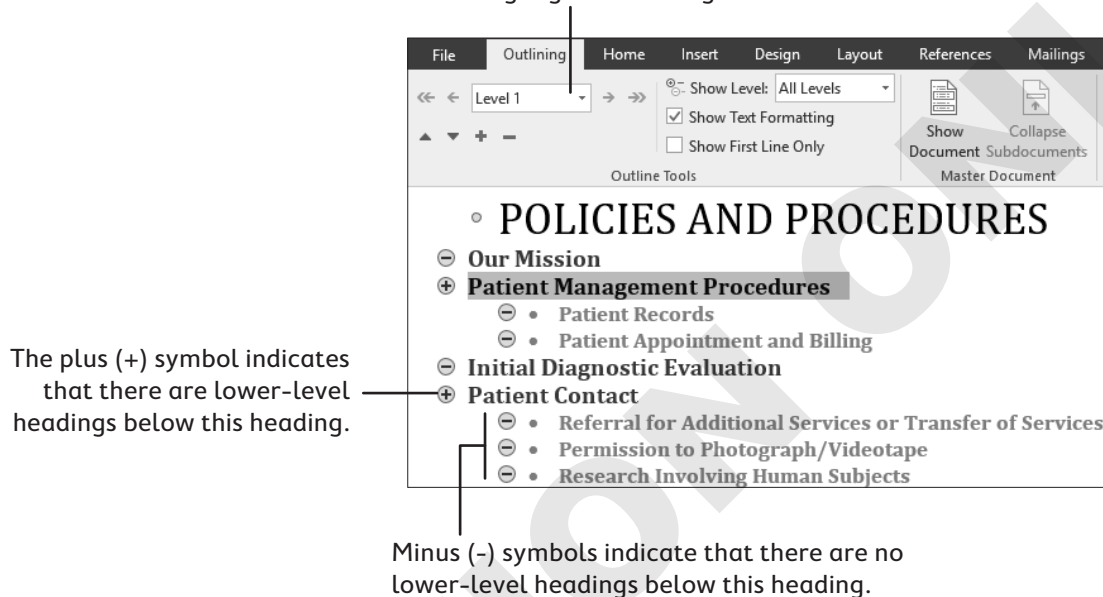
## Integrating Word with PowerPoint

PowerPoint is another program that Word can share files with. Word outlines can be used to create PowerPoint presentations. This hierarchical structure uses Heading 1 topics as the slide's title and headings such as Heading 2, Heading 3, and so forth as the bullet and sub-bullet entries in the slide.

## Using Word Outline View

The following illustration is an example of an outline created specifically for generating a PowerPoint presentation. Clicking or selecting entries in the outline displays the Word heading level in the Outlining tab on the Ribbon.

This field displays the Word heading style level of the highlighted heading.




Although you can use an existing document that contains Word headings to create a PowerPoint presentation, PowerPoint cannot extract just the headings from a document, so if you use an existing document with body text in addition to the headings, you will have to edit the PowerPoint presentation accordingly.

The procedures used to launch PowerPoint are the same as those used to launch Word. No special knowledge of PowerPoint is required to complete the following exercise.

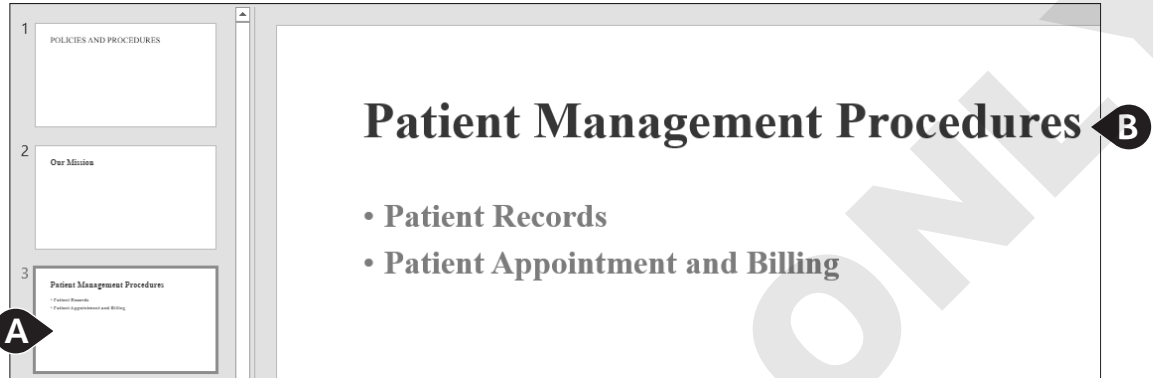
☰ View→Views→Outline

### DEVELOP YOUR SKILLS: W4-D6

*In this exercise, you will use a Word outline to create a PowerPoint presentation. Then you will observe how the different heading levels are displayed in the presentation.*

1. Open **W4-D6-ProcOutline** from your **Word Chapter 4** folder.
2. Choose **View→Views→Outline** .
3. Click several different entries in the outline and notice the Word heading level indicated on the Ribbon.
4. Close the document and start PowerPoint.
5. Click the **Blank Presentation** template on the PowerPoint Start screen to open the PowerPoint window.
6. Choose **File→Open** and navigate to your **Word Chapter 4** folder.

7. In the bottom-right corner of the Open dialog box, click the file type drop-down list and choose **All Files (\*.\*)**.
8. Double-click **W4-D6-ProcOutline** to open it.
9. Follow these steps to display a slide containing a title and bullet points:



- A Click the third slide in the panel on the left.
  - B This title was formatted using the Heading 1 style, and the bullet points are formatted using the Heading 2 style.
10. Exit PowerPoint without saving the file.

## Adding a PowerPoint Presentation to a Word Document

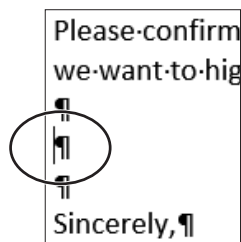
When you create a document that will be distributed electronically, it could be useful to include a PowerPoint presentation within the document. For example, suppose you want to distribute a presentation and include a letter with it. You can create the letter and place the presentation in the body of the letter.


☰ Insert→Text→Object→Create from File

### DEVELOP YOUR SKILLS: W4-D7

*In this exercise, you will insert a presentation into the letter being sent to board members.*

1. Open **W4-D7-AdvisoryLtr** from your **Word Chapter 4** folder and save it as **W4-D7-AdvisoryLtrRevised**.
2. Turn on formatting marks and then position the insertion point in the middle paragraph symbol just before the complimentary close for the letter.



3. Choose **Insert**→**Text**→**Object**  and click the **Create from File** tab.
4. Click **Browse** and navigate to your **Word Chapter 4** folder.
5. Double-click **W4-D7-IntroToRCE.ppt** (a PowerPoint file) and then click **OK**.
6. Click the slide image to display the sizing handles.
7. Drag the lower-right sizing handle diagonally up toward the center of the image until the letter fits on one page.
8. Double-click the slide image in the letter to start the slide show.
9. Click the mouse pointer anywhere on the screen to advance the slides.
10. When the black screen appears at the end of the show, click one more time to close it.
11. Save and close the file.

## Opening, Editing, and Saving a PDF File

You can open, edit, and save a PDF file in Word 2016 without purchasing and learning separate, and often expensive, editing software. After editing the file, you can save it as a Word or PDF file. The file you open is considered a read-only file, so you must save it under a different name.

You can optimize a PDF file when you save it based on how your audience will likely read the file. And there are additional options, such as the range of pages you want to save and the ability to create bookmarks in the PDF file.

Choose additional publishing options here.

File name: W4-D8-PressRelRevised.pdf

Save as type: PDF (\*.pdf)

Authors: Jill Murphy      Tags: Add a tag

Optimize for:  Standard (publishing online and printing)  
 Minimum size (publishing online)

Open file after publishing


**Options...**

If your audience will be printing the PDF file, leave the option at Standard.  
 If the file will be viewed only online, you can choose the Minimum Size option.

### DEVELOP YOUR SKILLS: W4-D8

*In this exercise, you will open a PDF file in Word and make editing changes. You will then resave the file as a PDF.*

1. Choose **File**→**Open**, navigate to your **Word Chapter 4** folder, and open **W4-D8-PressRel**.
2. When the message appears, take a moment to read it and then click **OK**.
3. Select the three lines at the top of the page.

4. Choose **Home**→**Font**→**Font Color**  **menu button** ▼ and choose **Blue, Accent 1, Darker 25%**.
  5. Choose **Home**→**Font**→**Font Size** and choose **16 pt**.
  6. Choose **File**→**Save As**, navigate to your **Word Chapter 4** folder, save the file as **W4-D8-PressRelRevised**, choose **PDF (\*.pdf)** from the Save as Type list, and then click **Save**.
  7. If the PDF file opens in a PDF reader, close the PDF window.
  8. The original file is still open in Word; close the file without saving.
- 

## Creating Web Pages from Word Documents

You can create web pages from Word documents. As you might imagine, this saves you the need to learn a more specialized web design or coding program. Another advantage is that Word can display a document in Web Layout view so you can make edits before posting the file on the web.

### Format Web Pages

Web pages are often set up in tables to help align text in multiple columns, and the Table feature works well for this purpose. When you save a document as a web page, Word converts it to hypertext markup language (HTML), the authoring language for web pages. When you convert a document to HTML, some formatting features may be lost. However, most of your documents should translate cleanly into attractive web pages.

### Add Alternative Text

Using alternative text helps people with limited vision understand the meaning of pictures and graphics. Although traditionally used with web pages, you can also add alternative text to regular Word documents for greater accessibility.

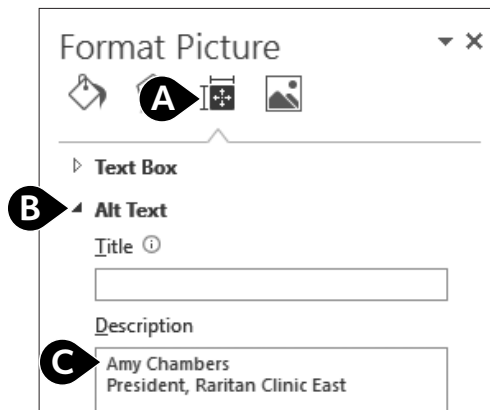
If a person uses a screen reader while viewing a web page, alternative text appears when hovering the mouse pointer over a picture or graphic. Some users won't see the text, but they'll hear it.

#### DEVELOP YOUR SKILLS: W4-D9

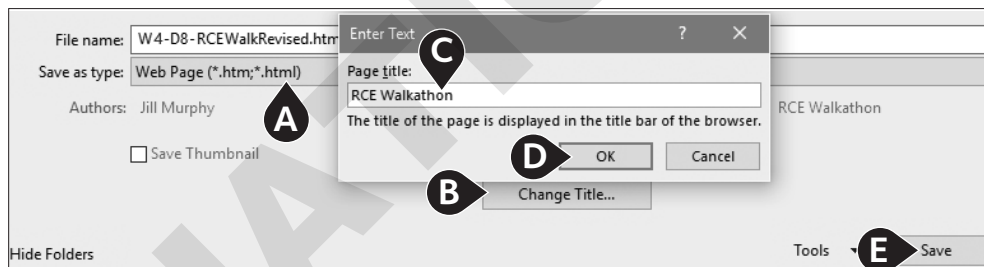
*In this exercise, you will save a document as a web page and examine its format. You will also add alternative text to a picture in the document.*

1. Open **W4-D9-RCEWalk** from your **Word Chapter 4** folder and save it as **W4-D9-RCEWalkRevised**.
2. If no gridlines appear, choose **Table Tools**→**Layout**→**Table**→**View Gridlines**.
3. Right-click the picture and choose **Format Picture** to open the Format Picture task pane.

4. Follow these steps to add alternative text:



- Ⓐ Click the **Layout & Properties** button.
  - Ⓑ Click **Alt Text**.
  - Ⓒ Type this text in the description field.
5. Close the Format Picture task pane.
6. Choose **File**→**Save As** and navigate to your **Word Chapter 4** folder.
7. Follow these steps to set the format and title of the web page document:



- Ⓐ Choose **Web Page (\*.htm;\*.html)** from the Save as Type drop-down list.
  - Ⓑ Click the **Change Title** button to open the Enter Text dialog box.
  - Ⓒ Type **RCE Walkathon** in the Page Title field.
  - Ⓓ Click **OK**.
  - Ⓔ Click **Save**.
8. Launch Internet Explorer or your default browser.
9. Press **Ctrl** + **O** and click the **Browse** button.
10. Navigate to your **Word Chapter 4** folder, double-click **W4-D9-RCEWalkRevised.htm**, and click **OK**.
11. Review the document layout and notice that the gridlines do not appear.
12. Close the browser and the Word web page file.



## Edit Web Pages in Word

When you create a web page in Word, you can use Word to edit the page as well. You open the *.htm* page from within Word, make the necessary changes, and then resave the file. When you open it in the browser again, you will see the editing changes that you made.

### DEVELOP YOUR SKILLS: W4-D10

*In this exercise, you will open the web page you created in the previous exercise and edit it. Then you will reopen the page in your browser and observe the change.*

1. Open **W4-D9-RCEWalkRevised.htm**.
  2. Change the walkathon date from March 1 to March 8.
  3. Save and close the file and then restart your browser.
  4. Press **Ctrl** + **O** and navigate to your **Word Chapter 4** folder.
  5. Double-click **W4-D9-RCEWalkRevised.htm** and click **OK**.
  6. Observe the date change you made in the web page.
  7. Close your browser and exit Word.
-

# Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. The Paste Special dialog box has an option to link the pasted object to the source document. True False
2. The hierarchical structure of a Word outline is based on Word's heading styles. True False
3. When you link data from another application to a Word document, the data in the other application is known as the destination file. True False
4. Tables are often used as an alignment tool when creating web pages. True False
5. HTML is the authoring language for web pages. True False
6. The Office 2016 suite allows you to share data and objects among the programs in the suite. True False
7. You cannot break a link once it is established. True False
8. If a linked worksheet does not update, you can right-click the worksheet table and choose Update Link. True False
9. Using alternative text helps people with limited vision understand the meaning of pictures and graphics. True False
10. A Word document linked to an Excel worksheet must be open when edits are made to the worksheet; otherwise, the data in the Word document will never update to reflect the edits in Excel. True False
11. Which of the following is a correct statement regarding a linked object?
  - A. It is a static object.
  - B. The object can only occur on a web page.
  - C. It can be updated when the source document is modified.
  - D. The data must be edited in both the source and destination documents.
12. Which of the following is true regarding saving a Word document as a web page?
  - A. The document cannot be viewed in a web browser until it is mounted on a web server.
  - B. It cannot be edited after it has been converted.
  - C. It may lose some formatting features when it is converted.
  - D. The web page cannot be viewed on the Internet.
13. Which of the following is correct regarding using an Excel worksheet as a data source for a mail merge?
  - A. It should follow the rules for an effective data source.
  - B. You can use Word to edit the page.
  - C. You can edit it only in a specialized web-design program.
  - D. You should edit it in your browser.

(continued)

14. Which of the following is a method for linking data from an Office 2016 application to Word?
- A. Insert External Item
  - B. Connect
  - C. Insert Object
  - D. Export Excel

EVALUATION ONLY

EVALUATION ONLY

# Self-Assessment Answer Key

## CHAPTER 1: COLLABORATING IN WORD

Item	Answer	Page Number
1	False	3
2	True	5
3	False	4
4	True	2
5	True	7
6	False	6
7	True	9
8	False	6
9	True	9
10	True	11
11	C	9
12	C	12
13	B	11
14	D	4

## CHAPTER 3: PERSONALIZING WORD

Item	Answer	Page Number
1	False	43
2	True	38
3	True	41
4	False	39
5	False	33
6	False	37
7	False	32
8	True	43
9	True	38
10	True	39
11	C	35
12	A	39
13	B	35
14	A	38

## CHAPTER 2: SHARING AND SECURING CONTENT

Item	Answer	Page Number
1	True	16
2	True	25
3	True	25
4	False	16
5	True	19
6	False	26
7	False	19
8	False	25
9	True	20
10	True	17
11	C	17
12	C	22
13	C	19
14	C	24

## CHAPTER 4: INTEGRATING WORD WITH EXCEL, POWERPOINT, AND THE WEB

Item	Answer	Page Number
1	True	48
2	True	55
3	False	49
4	True	59
5	True	59
6	True	48
7	False	52
8	True	51
9	True	59
10	False	52
11	C	48
12	C	59
13	A	54
14	C	48

EVALUATION ONLY

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# NOTES

EVALUATION ONLY

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