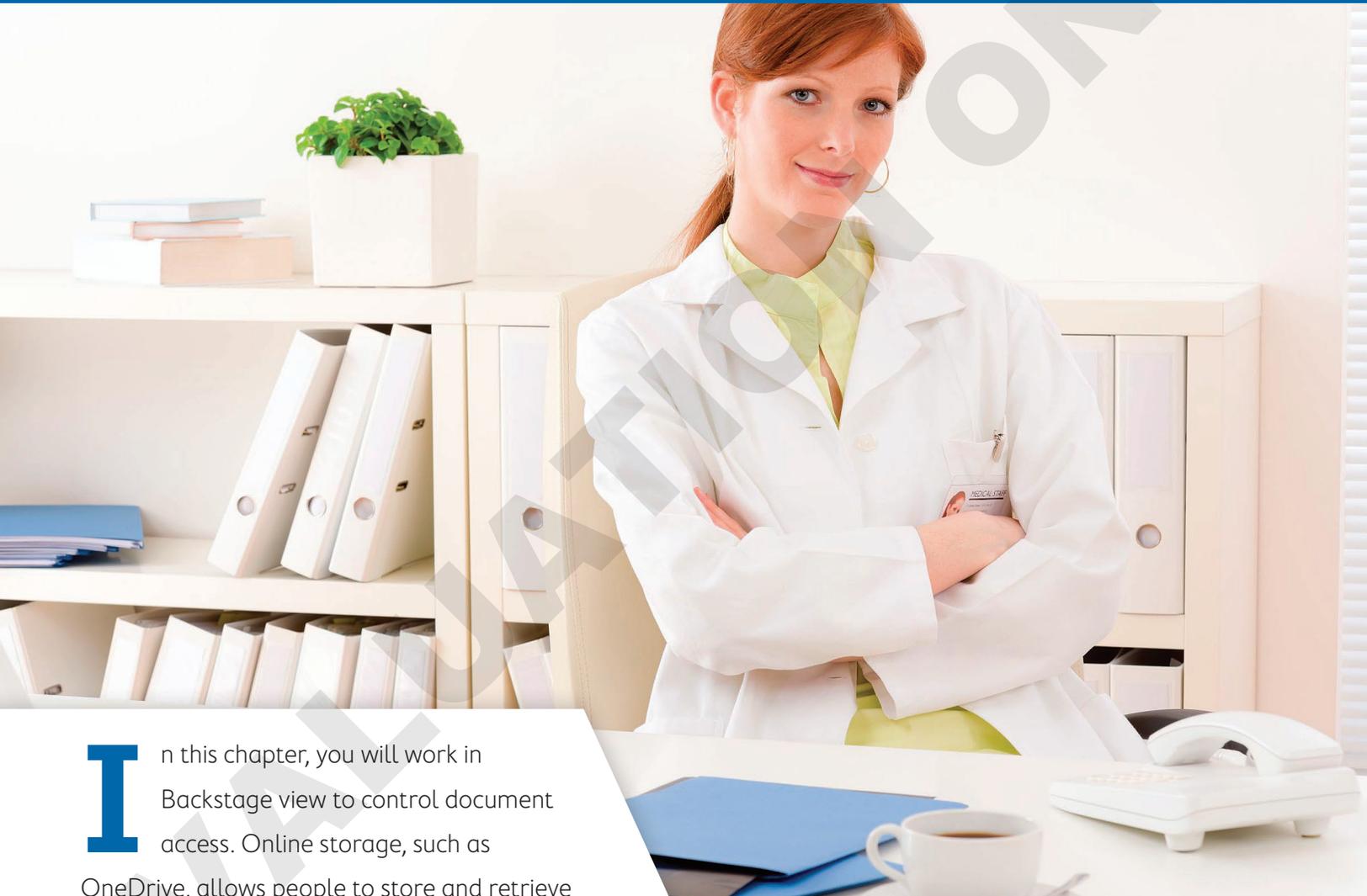


10

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 and digital signatures

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: W10-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 **W10-D1-2003ProcMan** from your **Word Chapter 10** folder, and save it as **W10-D1-2003ProcManRevised**.

Notice the term [Compatibility Mode] in the title bar at the top of the screen.

W10-D1-2003ProcManRevised.doc [Compatibility Mode] - Word

Now you will attempt to add a Word 2016 SmartArt graphic to the Word 2003 Compatibility Mode document.

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** .

Note that Word opens the Word 2003 Diagram Gallery, rather than the Word 2016 SmartArt gallery, because the Compatibility Mode document cannot work with Word 2016's SmartArt feature.

4. Click **Cancel** to close the Diagram Gallery.

Next you will observe how Word saves the Compatibility Mode document.

5. Choose **File**→**Save As** and navigate to your **Word Chapter 10** folder.

Notice that Word 2016 defaults to the Word 97–2003 format in the Save As Type field. Word 2016 defaults to the older format unless you purposely convert the document to a .docx format or save it as a Word Document (*.docx) via the Save As Type drop-down list.

6. Click **Back**  in the upper-left corner to return to the document.

7. Leave the file open.

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: W10-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 **W10-D2-2003ProcManRevised**.
2. Choose **File→Info→Convert**.

A message appears indicating that conversion may cause some minor layout changes. For example, in this document, the pagination is altered slightly when converted.

3. Click **OK** to acknowledge the message.

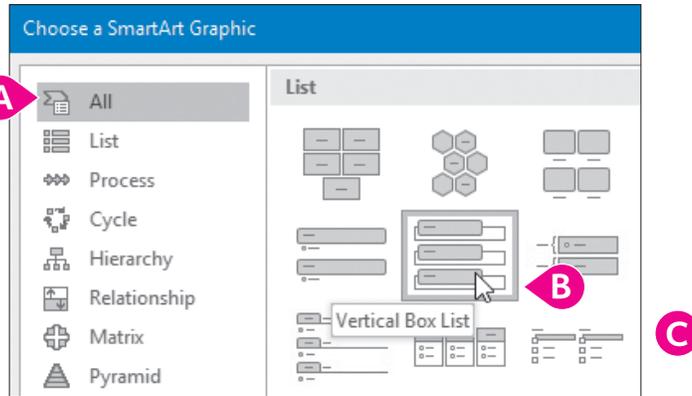
Notice that the term [Compatibility Mode] has disappeared from the title bar.

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** .

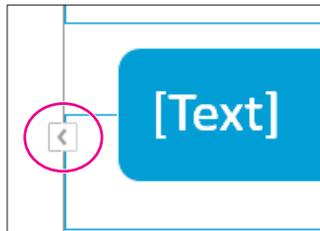
Because you converted the document, the SmartArt gallery is now available.

7. Follow these steps to insert a SmartArt graphic:

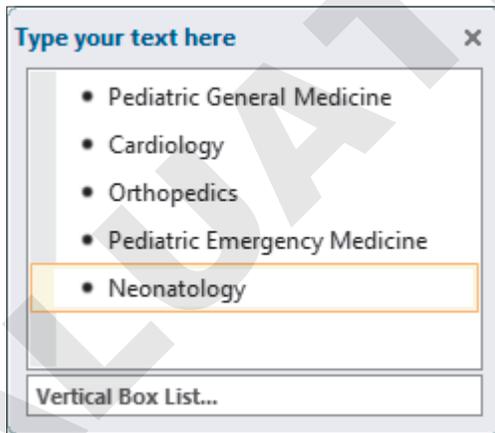


- A Choose **All** from the category list.
- B Choose the **Vertical Box List** graphic.
- C Click **OK**.

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:



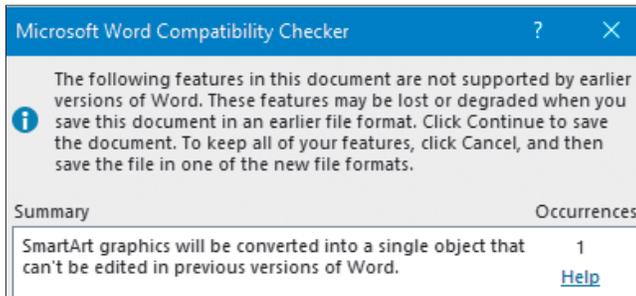
- 10. Click the **Close** (X) button to close the Type Your Text Here pane.
- 11. Save the document.

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.

Warning!

Avoid round-tripping your document to prevent unwanted loss of time and data.

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: W10-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 10** folder.

2. Click the **Save as Type** drop-down list, choose **Word 97–2003 Document**, and click **Save**.
Word displays the Compatibility Checker with a message indicating that you will not be able to edit the SmartArt graphic, so you've decided not to complete the conversion.
3. Click **Cancel**.
4. Choose **File→Info→Check for Issues→Check Accessibility** to open the Accessibility Checker task pane.
Notice the two categories: Errors and Tips. There are no warnings for this document.
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.

Warning!

Before using the automatic Remove All option for a category, make a copy of the document, run the Document Inspector on the copy, and remove all issues to see the effect. This will help prevent unwanted data loss.

☰ File→Info→Properties

☰ File→Info→Check for Issues→Inspect Document

DEVELOP YOUR SKILLS: W10-D4

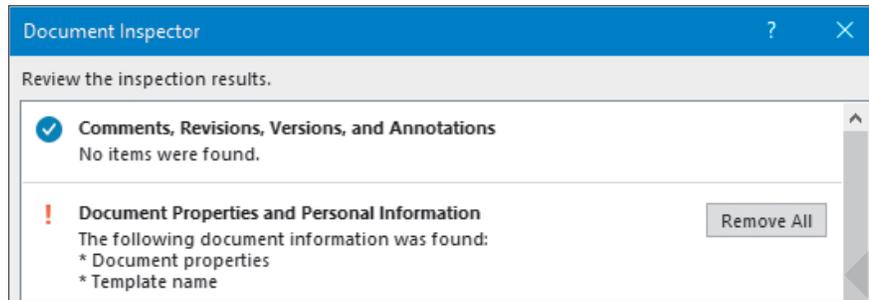
In this exercise, you will view document properties and run the Document Inspector. You will remove all personal data from the document.

1. Save your file as **W10-D4-2003ProcManRevised**.
2. Choose **File→Info** and review the properties information in the panel on the right.
Notice that names appear in the Related People area. You can remove the author's name if desired.
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**.

- If prompted to save changes, click **Yes**.

The *Document Inspector* dialog box opens. You can remove the checkmark from any items you don't want inspected. In this example, you will leave all checkboxes checked.

- Click **Inspect** at the bottom of the dialog box and review the results.



The inspector found document properties.

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

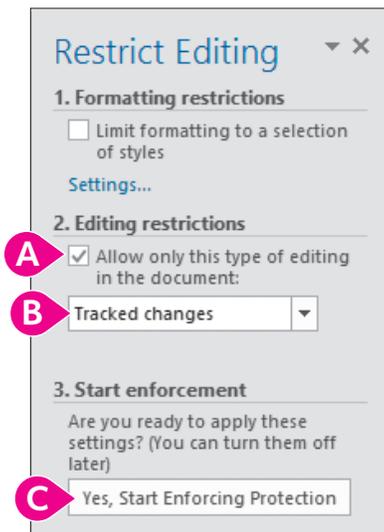
- ▶ **Restrict for Tracked Changes:** This setting protects a document from having Track Changes disabled. Every change to the document will be noted. In addition, no one can accept or reject changes while the document is protected.
- ▶ **Restrict for Comments:** This setting permits reviewers to insert 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: W10-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 **W10-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**.

Word displays the *Start Enforcing Protection* dialog box. At this point, you can either click **OK** to restrict editing without a password or enter the desired password.

4. Click **OK** to dismiss the password dialog box.
5. On page 2, delete *of Services* in the *Scope of Services* heading.
The change is marked with Track Changes. No one can alter the document without changes being tracked.
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.

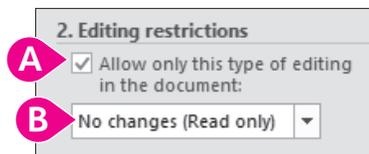
Allow Changes to Part of a Document

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.

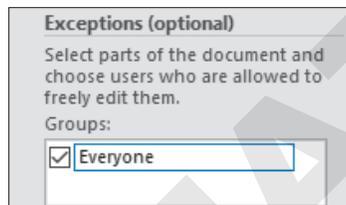
DEVELOP YOUR SKILLS: W10-D6

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 **W10-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).



This specifies that all reviewers will be able to edit these paragraphs.

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.

The editable paragraphs are shaded to make them easily visible to reviewers.

Attempt to Edit in a Restricted Area

9. Select a word anywhere there is no shading and tap **Delete**.

Nothing happens because you are restricted to editing only the shaded paragraphs.

10. Delete the third paragraph in the shaded area.

The deletion is allowed because it is in the area that was specified as an exception.

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.

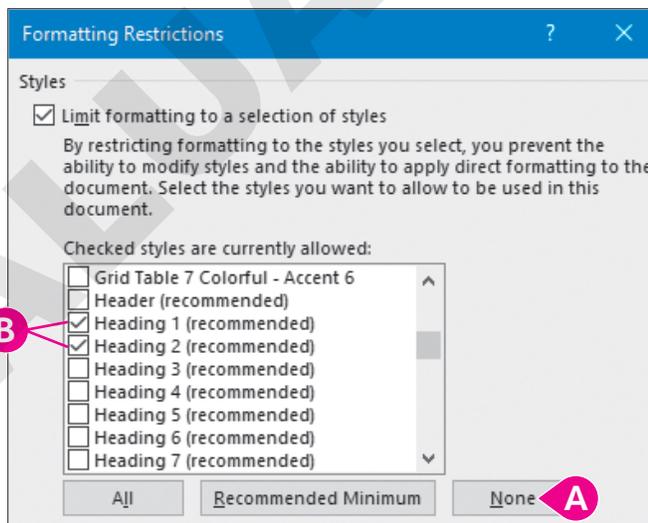
DEVELOP YOUR SKILLS: W10-D7

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

1. Save your file as **W10-D7-2003ProcManRevised**.
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to open the Formatting Restrictions dialog box:



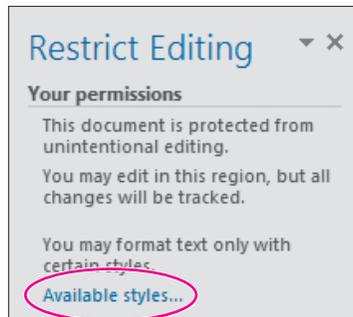
- A Place a checkmark here.
- B Click the **Settings** link.
4. Follow these steps to set specific restrictions:



- 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.

The only formatting change a reviewer can make is to add Heading 1 or Heading 2 formatting.

5. Click **OK**, and when Word displays a message asking if you want to remove other styles, click **No**.
Removing other styles from the document would reformat the entire document, possibly with unexpected results.
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.
In this example, you will not add a password.
8. Click **OK** to dismiss the password dialog box.
Notice that the task pane now contains a link to Available Styles.



9. Click the **Available Styles** link to display the Styles task pane.
In addition to the Normal style, the only styles available are Heading 1 and Heading 2.
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.
Notice that all of the Font and Paragraph formats are grayed out in the Ribbon because formatting is restricted to two heading styles.
12. Click **Stop Protection** at the bottom of the Restrict Editing task pane and then close the task pane.
Notice that the Font and Paragraph formats are restored on the Ribbon.
13. Save the file.

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: W10-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**.

Notice that the security setting is displayed in the Info screen.



4. Click **Back**  and then save and close the document.

Depending on the security settings on your computer, you may receive a message asking whether you would like to increase the security. Respond by clicking **No**.

Now you'll open the document with a password.

5. Choose **File**→**Open** and click **W10-D7-2003ProcManRevised** at the top of the Recent Document list.

In some classrooms, the Recent Documents list may be cleared upon rebooting the computer. If so, navigate to your Word Chapter 10 folder to open the document.

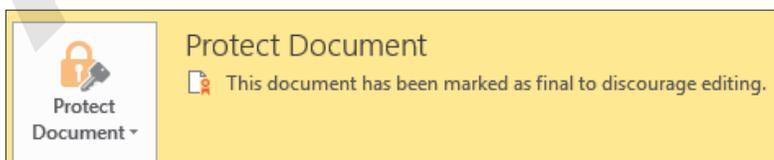
6. Type **pass** in the password box and click **OK**.

Now you will remove the password.

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.

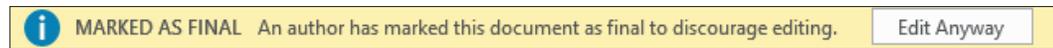
Marking a Document as Final

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: W10-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**.
Word displays additional information about this setting.
3. Take a moment to read the information and then click **OK**.
The security setting is displayed on the Info screen.
4. Click **Back**  to return to the document.
Notice the Marked as Final bar at the top of the screen.
5. Select the heading *Our Mission* on page 2.
6. Tap **Delete** 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 the file.

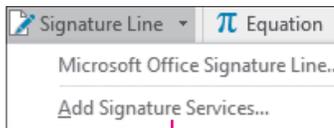
Attaching Digital Signatures

With the capability to rapidly pass documents globally, security concerns may arise. For example, how can a client know for certain that a critical document originated in your office? A **digital signature** is a secure means of stamping a document as authentic and originating only from you. Other people cannot modify a signed document without removing the digital signature or marking it as invalid.

You may use a digital signature when passing documents to others as an email attachment, as a downloadable file on your organization's intranet, from a website, or on a flash drive. You add a digital signature to a file by first attaching a digital certificate.

Digital Certificates

Digital certificates may be obtained from third-party vendors, who check identification before issuing a certificate. If you post documents on an intranet or the Internet, your network administrator will usually provide you with an authentic digital certificate.



This option on the Signature Line menu links to a Microsoft website, where you can choose a third-party vendor.

You may also create your own digital certificate, although its use is limited. Self-made certificates are not verified by any outside agency; therefore, they're not necessarily a reliable measure, but they are the most convenient.

DEVELOP YOUR SKILLS: W10-D10

In this exercise, you will create a temporary digital certificate on your local computer. You will start by locating the SELFCERT application on your computer, which is installed as part of the Microsoft Office 2016 package.

1. Open **File Explorer**  and navigate to the **SELFCERT** application through a path such as C:\Program Files (x86)\Microsoft Office\root\Office16.

Note!

You may need to seek assistance to determine the correct file path for this application on your computer. And note that you may not have user permission to create a digital certificate on computers that are for general use by multiple people.

2. Scroll to locate the **SELFCERT** application. 
3. Double-click the file. When the Create Digital Certification dialog box opens, type **James Elliott** in the **Your Certificate's Name** field.

4. Click **OK**; when a message appears indicating that a certificate was successfully created for James Elliott, click **OK** again.

You have now created a digital certificate that can be used to apply a digital signature to your files.

5. Close the File Explorer window and then save the file.

Digital Signatures

There are two ways to add a digital signature to a document:

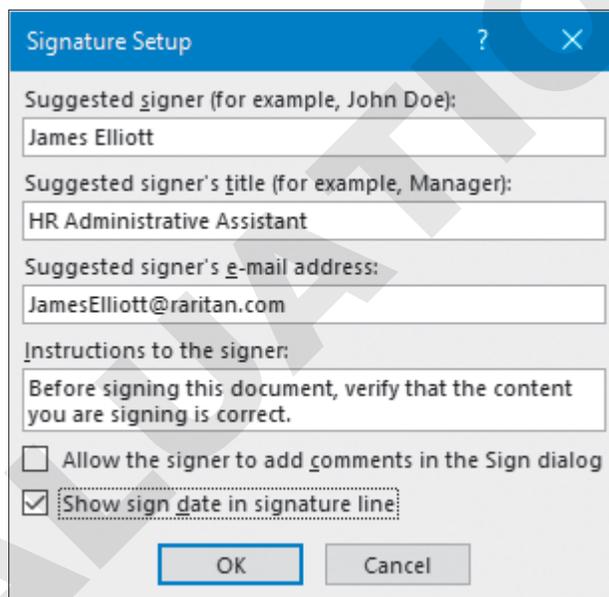
- ▶ You can add a visible signature line to a document and then capture the digital signature when the document is signed.
- ▶ If a visible signature line is not necessary, you can add an invisible digital signature. A signature button appears on the status bar at the bottom of the screen, so the recipient can verify that the document has a digital signature.

 Insert→Text→Signature Line

DEVELOP YOUR SKILLS: W10-D11

In this exercise, you will add a signature line to a document and add a digital signature. You will then attempt to modify the signed document. Finally, you will remove the visible signature and add an invisible digital signature.

1. Save your file as **W10-D11-2003ProcManRevised**.
2. Press **Ctrl+End** to move to the end of the document and then tap **Enter** twice.
3. Choose **Insert→Text→Signature Line**  to display the Signature Setup dialog box.
4. Complete the information as shown:



The Instructions to the Signer text is provided by default. You can modify it if necessary. In this exercise, you'll leave the text as it is.

5. Click **OK** to complete the signature setup.
A signature line appears with the signer's name and title below. Now you'll sign the document.
6. Right-click the signature line and choose **Sign**.

7. Follow these steps to sign the document:

- A** Type **James Elliott** here.
- B** If the Signing As name isn't James Elliott, click **Change**, choose **James Elliott**, and click **OK**. Click **Yes** when the message appears to use the certificate.
- C** Click **Sign**.

If you didn't change the Signing As name, a message appears indicating the certificate cannot be verified and asking whether you want to use this certificate. Remember, a self-created certificate is not verified by a third-party agency.

- 8. If necessary, click **Yes** to use the certificate.
- 9. When a message appears indicating your signature has been saved, click **OK**.

A yellow bar appears at the top of the document indicating that the document is marked as final. The Recoverable Signature note above the signature is notifying you that the signature is not verified by an outside agency. A signature button appears on the status bar indicating that there is a digital signature in the document.



- 10. Attempt to delete a word in the paragraph above the signature line.

A message briefly appears on the status bar indicating that you can't make a change because the selection is locked.

Now you will remove the signature so you can add an invisible signature. Remember, you can use an invisible signature when a visible signature is not required; however, a signature button will still appear on the status bar.

- 11. Click the signature button on the status bar to display the Signatures task pane.

You may notice the term Recoverable Error at the top of the task pane. This is because you are using a self-created certificate.

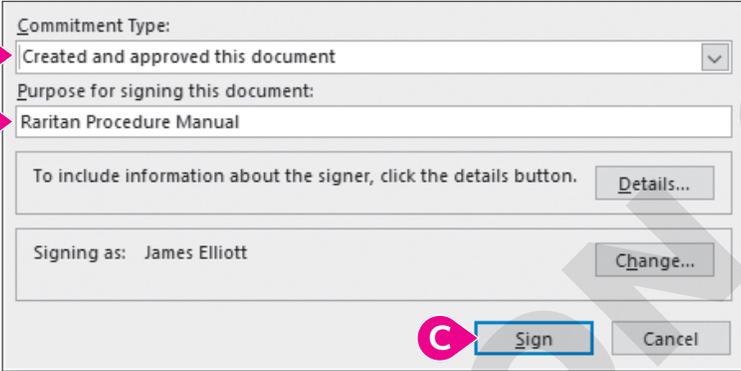
- 12. Right-click the **James Elliott** signature in the task pane and choose **Remove Signature**.

A message appears verifying that you want to remove the signature.

13. Click **Yes** to remove the signature.
14. When a message appears indicating that the signature was removed, click **OK** to dismiss the message.

Remove the Signature Line and Add an Invisible Digital Signature

15. Select the signature line and tap **Delete** to remove it.
16. **Close**  the Signatures task pane.
Now you will add an invisible signature, which you do in Backstage view.
17. Choose **File**→**Info**→**Protect Document**→**Add a Digital Signature**.
18. Follow these steps to add the signature:



- A** Choose **Created and Approved This Document**.
- B** Type **Raritan Procedure Manual** here.
- C** Click **Sign**.

A message appears indicating the certificate cannot be verified. Again, a self-created certificate is not verified by a third-party agency.

19. Click **Yes** to use the certificate.
20. When a message appears indicating the signature has been saved with the document, click **OK**.
Notice the Marked as Final note in the yellow bar at the top of the screen and the signature button on the status bar.
Because you cannot edit a document after a signature has been attached, there is no option to save the document. When you close the document, the signature will still be attached.

21. Close the file and exit Word.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or eLab course.

Reinforce Your Skills

REINFORCE YOUR SKILLS: W10-R1

Plan for Trout in the Classroom

Kids for Change hopes to get involved in the “Trout in the Classroom” project, in which kids raise fish from eggs until they are ready to be released in streams. A team member created a research report in Word 2003, but the rest of the team is using Word 2016. In this exercise, you will convert a Word 2003 document to the Word 2016 format, and you will work with backward compatibility, document properties, and the Document Inspector.

1. Start Word, open **W10-R1-Trout** from your **Word Chapter 10** folder, and save it as **W10-R1-TroutRevised**.

Observe the term [Compatibility Mode] in the title bar. Now you will attempt to add a SmartArt graphic to the document.

2. Press **Ctrl+End** to position the insertion point at the end of the document.
3. Choose **Insert→Illustrations→SmartArt** .

The Word 2003 Diagram Gallery opens because a Word 2003 document is not compatible with the SmartArt feature.

4. Click **Cancel** to close the Diagram gallery.

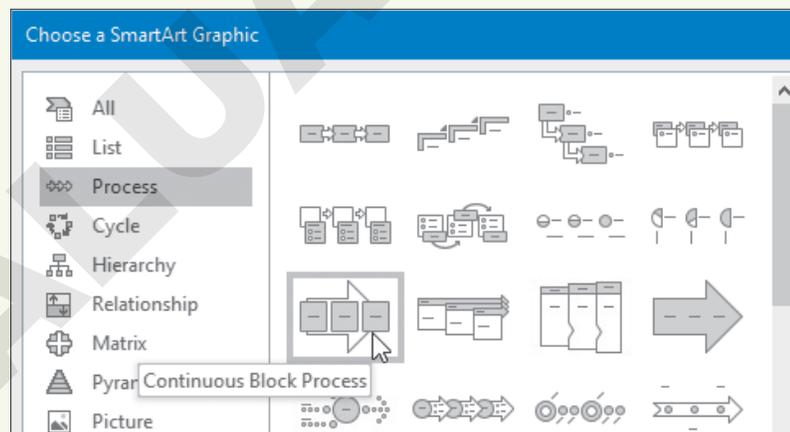
Now you will convert the document to the Word 2016 format.

5. Choose **File→Info→Convert** and click **OK** when the conversion message appears.

Notice that [Compatibility Mode] no longer appears in the title bar; the document is now in the Word 2016 format. Now you will insert a SmartArt graphic.

6. Choose **Insert→Illustrations→SmartArt** .

7. Choose the **Process** category on the left, choose **Continuous Block Process**, and click **OK**.



8. Click the tab to the left of the graphic and type the following in the Type Your Text Here pane; close the text pane when you're finished:
 - First bullet: **Hatch**
 - Second bullet: **Release**
9. Click the third text box in the graphic to select it and tap **Delete**.
10. Position the mouse pointer on the graphic's upper-right corner sizing handle and then drag down diagonally toward the center of the image until it is about half its original size.

Prepare a Backward-Compatible Document

You want to make sure that the originator of the file will have access to it. You will format a Word 2016 document to be compatible with earlier versions.

11. Choose **File**→**Save As** and navigate to your **Word Chapter 10** folder.
12. Click the **Save As Type** drop-down list, choose **Word 97-2003 Document (*.doc)**, and click **Save**.

The Compatibility Checker opens, indicating that SmartArt graphics are not supported in earlier versions of Word. You will cancel the conversion so the SmartArt graphic will work as intended.

13. Click **Cancel**.

Inspect the Document

14. Choose **File**→**Info** and observe the Properties panel on the right.
Names appear in the Related People area.
15. In the Info screen, choose **Check for Issues**→**Inspect Document**.
A message appears indicating that you should save your changes because the Document Inspector may remove data that can't be restored.
16. Click **Yes** to save the file and open the Document Inspector.
In this example, you will leave all checkboxes checked.
17. Click **Inspect**.
The inspector found properties and personal information, which you will remove.
18. Click **Remove All** in the Document Inspector and then close the dialog box.
19. Choose **File**→**Info** and notice that the names were removed from the Related People area in the Properties panel.
20. Click **Back**  to return to the document.
21. Save and close the file.

REINFORCE YOUR SKILLS: W10-R2

Help in a Backyard Bee-Counting Project

There has been a decline in the bee population, and Kids for Change plans to help gather data by taking part in a bee-counting project. One of the members has researched methodologies for doing this. The research will be the basis of discussion for the next monthly meeting. In this exercise, you will use document protection features to prevent the document from being modified accidentally.

1. Open **W10-R2-Bees** from your **Word Chapter 10** folder and save it as **W10-R2-BeesRevised**.
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing** and place a checkmark in the checkbox below the Editing Restrictions heading in the task pane.
3. Choose **Tracked Changes** from the drop-down list and then click **Yes, Start Enforcing Protection**.
4. When the dialog box opens, enter **pass** in both password fields and click **OK**.

5. Select *method* in the first line of the first paragraph below the *Counting the Vanishing Bees* heading and type **technique** in its place.

The changes are marked because no one can modify the document without changes being tracked.

6. Click **Stop Protection**; when the Unprotect Document box appears, type **pass** in the Password field and click **OK**.

Now you will accept the changes you made.

7. Choose **Review**→**Changes**→**Next** .

8. **Accept**  both changes and then click **OK** when the message appears.

Apply Editing Restrictions

Now you will apply editing exceptions and specify only certain parts of the document that can be edited. You will, however, allow reviewers to add comments anywhere in the document.

9. Choose **Comments** from the drop-down list in the Editing Restrictions section of the task pane.
10. Select the first three paragraphs in the main article and then place a checkmark in the **Everyone** checkbox below the Exceptions (optional) heading in the task pane.
11. Click **Yes, Start Enforcing Protection** and then click **OK** to close the dialog box without setting a password.
12. Deselect the paragraphs and notice that the unprotected area is shaded, making it easy for reviewers to locate.
13. Select any word outside the shaded section and attempt to delete it.
The deletion doesn't work because only the shaded area can be edited.
14. In the first line of the third shaded paragraph, select *decline in* and replace it with **waning**.
The change is allowed because it is in the area specified as an exception. Now you will add a comments as comments were specifically permitted in the Restrict Editing task pane.
15. In the fifth paragraph of the article, select *\$200 billion*.
16. Choose **Review**→**Comments**→**New Comment** .

Comments are allowed, not only in the exceptions area, but anywhere in the document.

17. Type this text: **Can anyone verify this dollar amount?**
18. Click **Stop Protection**.
19. Select the shaded paragraphs; remove the checkmark from the **Everyone** checkbox in the task pane and then close the task pane.
20. Right-click the comment in the markup area and choose **Delete Comment**.

Set a Document Password and Mark a Document as Final

21. Choose **File**→**Info**→**Protect Document**→**Encrypt with Password**.
22. Type **pass** in the Encrypt Document dialog box and click **OK**.
23. Type **pass** in the Confirm Password dialog box, click **OK**, and then save and close the document.

Note!

Depending on the security setting on your computer, you may receive a message asking if you would like to increase the security. Respond by clicking No.

24. Choose **File**→**Open** and click **W10-R2-BeesRevised** at the top of the Recent Documents list.
25. Type **pass** in the password box and click **OK**.
26. In the Backstage Info screen, choose **Protect Document** again and choose **Mark as Final**; when the message appears, click **OK**.
27. When additional information about this setting appears, click **OK**.
28. Click **Back**  to return to the document.
Notice the Marked as Final bar at the top of the screen.
29. Select the first paragraph in the main article and tap **Delete**.
The text is not deleted because the document is marked as final.
30. Choose **File**→**Info**→**Protect Document**→**Mark as Final** to turn off the feature.
31. Click **Back** .
The Marked as Final bar at the top of the document has disappeared.

Create a Digital Certificate and Add a Digital Signature

Now you will generate a self-created digital certificate so you can apply a digital signature to your document. Remember, a self-created certificate is not verified by an outside agency.

32. Open **File Explorer**  and navigate to the **SELCERT** application through a path such as C:\Program Files (x86)\Microsoft Office\root\Office16.

Note!

You may need to seek assistance to determine the correct file path for this application on your computer. And note that you may not have user permission to create a digital certificate on computers that are for general use by multiple people.

33. Scroll to locate the **SELCERT** application. 
34. Double-click the file; when the Create Digital Certification dialog box opens, type **Charles Eng** in Your Certificate's Name field and click **OK**.
35. When the message appears indicating the certificate was successfully created, click **OK** and then close the File Explorer window.
36. Position the insertion point at the end of the document and choose **Insert**→**Text**→**Signature Line** .
37. Follow these guidelines to complete the information in the dialog box:
 - Suggested Signer: **Charles Eng**
 - Suggested Signer's Title: **Project Manager**
 - Suggested Signer's E-mail Address: **CharlesEng@Kids.com**.
 - Click **OK** to complete the setup.
38. Right-click the signature line and choose **Sign**; type **Charles Eng** next to the X in the Sign dialog box.
39. If the Signing As name at the bottom of the dialog box is not Charles Eng, follow these steps:
 - Click the **Change** button, choose **Charles Eng**, and click **OK** to close the dialog box.
A message appears indicating the certificate cannot be verified because a self-created certificate is not verified by an outside agency.
 - Click **Yes** to use the certificate.

40. Click the **Sign** button to close the Sign dialog box; click **Yes** to acknowledge that the certificate cannot be verified.
41. Click **OK** when the next message appears.
42. Attempt to delete a word in the document.
The deletion does not work because you cannot edit a signed document.
43. Save and close the document.

REINFORCE YOUR SKILLS: W10-R3

Learn About 4-H

Kids for Change is thinking about partnering with the 4-H organization on a project. One of the members has researched the organization, and the research document will be the basis for discussion in the next monthly meeting. In this exercise, you will prepare a document for sharing by considering compatibility issues and controlling access to the document. Finally, you will apply a digital signature to the document.

1. Open **W10-R3-4H** from your **Word Chapter 10** folder and save it as **W10-R3-4HRevised**.
Notice the [Compatibility Mode] term in the title bar. Next you will convert this Word 2003 document to a Word 2016 document.
2. Choose **File**→**Info**→**Convert**.
3. When the message appears indicating the conversion may cause changes, click **OK**.
The term [Compatibility Mode] no longer appears in the title bar. Now you will work with the Document Inspector.
4. Choose **File**→**Info** and notice that names appear in the Related People area of the Properties panel.
5. In the Info screen, choose **Check for Issues**→**Inspect Document**.
6. When the message to save changes appears, click **Yes**.
7. When the Document Inspector opens, leave all checkboxes checked and then click **Inspect** and review the results.
The inspector found properties and personal information in the document.
8. Click **Remove All** and then close the Document Inspector.
9. Choose **File**→**Info** and notice that the names have been removed in the Related People area of the Properties pane.

Restrict Editing and Apply Editing Exceptions

10. In the Backstage Info screen, choose **Protect Document**→**Restrict Editing**.
11. If necessary, check the checkbox below the Editing Restrictions heading in the task pane and choose **Tracked Changes** from the drop-down list.
12. Click **Yes, Start Enforcing Protection** and then click **OK** to close the dialog box without setting a password.
13. In the first paragraph below the *About 4-H* heading, position the insertion point in front of *universities*, type **colleges and**, and tap Spacebar.
The changes are marked with Tracked Changes because that was chosen in the Restrict Editing task pane.

14. Click **Stop Protection** and then right-click the tracked change and choose **Accept Insertion**.
15. Choose **No Changes (Read Only)** from the drop-down list in the Editing Restrictions section of the task pane.
16. Select the three paragraphs below the *Cooperative Extension System* heading on page 1 and then check the **Everyone** checkbox in the task pane.
17. Click **Yes, Start Enforcing Protection** and click **OK** to bypass setting a password.
18. Click in the document to deselect the text and notice that the exceptions text is shaded.
19. If necessary, display formatting marks.
20. Position the insertion point next to the paragraph symbol at the end of the third line in the second paragraph.
21. Tap **Delete** twice to combine the paragraphs and then tap **Spacebar**.
22. Click **Stop Protection**, select the shaded paragraphs, and then remove the checkmark from the **Everyone** checkbox.
23. Close the Restrict Editing task pane.

Mark the Document as Final

24. Choose **File**→**Info**→**Protect Document**→**Mark as Final**.
25. When a message appears indicating that the document will be marked as final and saved, click **OK**.
26. When the message appears with additional information about this setting, click **OK**.
27. Click **Back**  to return to the document and notice the Marked as Final bar at the top of the screen.
28. Close the document.



Apply Your Skills

APPLY YOUR SKILLS: W10-A1

Plan a Tour of Mexico City

Universal Corporate Events is planning a tour of Mexico City for a client. The initial research is complete, and now it's time for colleagues to review the article. In this exercise, you will work with compatibility issues, convert a document to different formats, and work with document properties and the Document Inspector.

1. Open **W10-A1-MexCity** from your **Word Chapter 10** folder and save it as **W10-A1-MexCityRevised**.
2. Position the insertion point at the end of the document.
3. Attempt to insert a SmartArt graphic and then use the **Convert** command in Backstage view to convert the document to a **Word 2016 format**.

Notice that [Compatibility Mode] does not appear in the title bar.

4. Open the **SmartArt Graphic** dialog box, choose the **List** category, and then choose **Vertical Box List** (second graphic in the second row).
5. Open the **Type Your Text Here** pane and add this text at the bullet points:
 - **History**
 - **Economy**
 - **Climate**
6. Close the text pane and then resize the graphic to about half its original size.
7. Use the **Save As** command and navigate to your **Word Chapter 10** folder.
8. Choose **Word 97-2003 Document (*.doc)** from the Save as Type list and then click **Save**.

When the Compatibility Checker opens, notice that the SmartArt graphic will be converted to an object that can't be edited. You may want to edit the object in the future, so you will prevent the conversion.

9. Click **Cancel**.

Next, you will work with document properties and the Document Inspector.

10. Go to Backstage view and notice the names in the Related People area in the Properties panel.
11. Use the **Document Inspector** to inspect all categories listed in the dialog box.
12. Remove all document properties and personal information and then close the dialog box.
13. Go to Backstage view and notice that no names appear in the Related People area of the Properties panel.
14. Save and close the file.

APPLY YOUR SKILLS: W10-A2

Organize a San Francisco Tour

Universal Corporate Events is adding San Francisco to its West Coast tour options. A Universal Corporate Events rep has done some research, and now some other reps who are familiar with San Francisco will review the document. In this exercise, you will use features for securing the document so accidental changes are not made.

1. Open **W10-A2-SanFran** from your **Word Chapter 10** folder and save it as **W10-A2-SanFranRevised**.
2. Open the **Restrict Editing** task pane and restrict editing to **Tracked Changes**.
3. Enforce protection, using **pass** as the password.
Notice the message in the task pane indicating that all changes will be tracked.
4. Make the following edits:
 - In the fourth line of the first paragraph of the main article, delete *road*.
 - Replace *Within* at the beginning of the second paragraph with **In**.
 - In the second line of the same paragraph, delete the comment in parentheses.
5. Stop protection, enter your password, and accept the changes you made.
Now you will use formatting restrictions.
6. Apply formatting restrictions that limit formatting to the use of the **Heading 1** style; do not allow other styles to be removed.
7. Start enforcing protection and bypass using a password.
8. Display the available styles and apply the **Heading 1** style to the *Landmarks* and *Neighborhoods* headings.
9. Stop protection and then accept the formatting changes.
Now you will apply an editing exception.
10. Restrict editing to **Comments** and then select the *Chinatown* paragraph (starts at the bottom of page 1).
11. Check the **Everyone** checkbox to make the paragraph editable by all reviewers.
12. Start enforcing protection and bypass adding a password.
13. Make the following edits:
 - In the first sentence of the *Chinatown* paragraph, delete the phrase *part tourist trap, part*.
 - Select the *Landmarks* heading on page 1 and add this comment:
A trip to Muir Woods to see giant redwoods is a great side trip.
14. Stop protection, select the *Chinatown* paragraph, and remove the checkmark from the **Everyone** checkbox.

Create a Digital Certificate and Add a Signature

15. Open **File Explorer** and navigate to the **SELCERT** application.
16. Double-click **SELCERT** and then type **Ella Mae Chang** in the field at the bottom of the Create Digital Certificate dialog box.
17. Close the **File Explorer** window.

18. Position the insertion point at the end of the document and tap **Enter** twice.
19. Use the **Signature Line** command to open the Signature Setup dialog box.
20. Follow these guidelines to enter the information in the dialog box:
 - Suggested Signer: **Ella Mae Chang**
 - Suggested Signer's Title: **Project Manager**
 - Suggested Signer's E-mail Address: **EllaMae@uce.com**
21. Add **Ella Mae Chang** to the signature line.

Remember, you may need to change the Signing As name.
22. Attempt to delete a word in the document.

The deletion is not permitted because a signed document cannot be modified.
23. Delete the signature line in the document.

Now you will add an invisible signature.
24. Use the **Info** screen in Backstage view to add a digital signature.
25. In the Sign dialog box, choose **Created This Document** from the Commitment Type list.
26. In the **Purpose for Signing This Document** field, type **San Francisco Itinerary**.
27. Click **Yes** to use the certificate; when the message appears indicating the signature has been saved, click **OK**.
28. Close the file.

APPLY YOUR SKILLS: W10-A3

Prepare a Cape Town Itinerary

A Universal Corporate Events rep has conducted some research for a Cape Town travel itinerary. Now some colleagues will review the document. In this exercise, you will prepare the document for sharing. You will consider compatibility issues, apply editing restrictions and exceptions, and add a digital signature.

1. Open **W10-A3-CapeTown** from your **Word Chapter 10** folder and save it as **W10-A3-CapeTownRevised**.
2. Choose **Design**→**Document Formatting**→**Themes**.

This feature is not available in a Word 2003 document. Now you will convert the document to the Word 2016 format.
3. Use the **Convert** command to convert the document to the Word 2016 format.
4. Choose **Design**→**Document Formatting** and notice that the Themes feature is now available.

Now you will apply editing and formatting restrictions and formatting exceptions.
5. Apply the **Tracked Changes** editing restrictions, but don't add a password.
6. Make these edits:
 - In the first line of the first paragraph in the main article, replace *neighborhood* with **community**.
 - At the end of the same line, replace *inhabited* with **occupied**.
7. Stop protection and then accept the editing changes.
8. Apply formatting restrictions that limit formatting to the **Heading 1** and **Title** styles; don't allow any other formatting styles in the document to be removed.

9. Enforce protection, but don't set a password.
10. Display the available styles, apply the **Heading 1** style to the *What to See in Cape Town* heading, and then close the Styles task pane.
11. Stop protection and accept the formatting change you made.
Now you will apply editing exceptions to specify an area of the document where reviewers can freely edit.
12. Restrict editing to **Comments**, select the *Kirstenbosch Botanical Gardens* paragraph at the bottom of page 1, and then check the **Everyone** checkbox.
13. Enforce protection and bypass setting a password.
14. In the fourth line of the editable paragraph, right-click *diverse*, slide the mouse pointer to **Synonyms**, and choose **varied**.
15. Select *Bo-Kaap* at the beginning of the article and add this comment: **I think we should definitely include this in the tour.**
16. Stop protection.
17. Select the exceptions paragraph, remove the checkmark from the **Everyone** checkbox, and then close the task pane.

Add a Digital Signature

18. Open **File Explorer** and navigate to the **SELFCERT** application.
19. Double-click **SELFCERT** and enter **Marty Zane** at the bottom of the Create Digital Certificate dialog box; close the **File Explorer**.
20. Position the insertion point at the end of the document.
21. Set up the signature line with the following information:
 - Suggested Signer: **Marty Zane**
 - Suggested Signer's Title: **Project Manager**
 - Suggested Signer's E-mail Address: **MartyZane@uce.com**
22. Sign the signature line by entering **Marty Zane** next to the X in the Sign dialog box.
23. If necessary, change the Signing As name.
24. Close the document and exit Word.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W10-E1 That's the Way I See It

As the owner of a small business, you are considering adding a new product to your line. Decide on the type of business you are in and what the new product will be. Conduct online research of the new product.

Create a short introduction (3–5 sentences) describing why you think the new product will enhance your line. Copy content of one to two pages about the product, citing your sources. Include at least two headings. Save the file in Word 97-2003 Document (*.doc) format as **W10-E1-NewProd**.

Convert the file to the current format. Insert a SmartArt graphic from the List category and list three benefits of your new product. Restrict formatting to Heading 1 and Heading 2 styles and then apply heading styles to all of the headings. Restrict editing to Comments. Select one paragraph and make it exception text that all reviewers may freely edit. Add a comment to text that is not part of the exception text.

W10-E2 Be Your Own Boss

As a member of the marketing team at Blue Jean Landscaping, you are researching online marketing articles specifically targeted to the landscaping business. After researching several articles, decide which marketing approach you will use and write a short introduction (5–6 sentences) describing the benefits of your chosen approach.

Copy the article as the basis for your research document, citing your source. Save the document as **W10-E2-Market**. Because you will be distributing this document to current and potential customers, you want to check it for personal information. Examine the document properties to determine whether your name is visible in the Properties panel. Use the Document Inspector to remove all personal information. Set a document password (**pass**). Finally, create a digital certificate in your name and apply a visible digital signature to the end of the document and sign it.

W10-E3 Demonstrate Proficiency

The owner of Stormy BBQ is considering expanding the business to include a BBQ food truck. Conduct online research regarding how to start a food truck business. Create a one- to two-page report, copying information from the Internet and citing your sources. Write a short introduction (four to five sentences) summarizing why you think a food truck is a good or bad addition to the business. Save the document as **W10-E3-FoodTruck**.

Because you will distribute this document for the Stormy BBQ marketing staff to review, you will prepare it for sharing. Examine your document's properties and use the Document Inspector to remove all personal information. Apply editing restrictions, making it read-only. Enforce protection and assign the password (**pass**). Select a paragraph in the document and apply the exception that makes the paragraph available to all reviewers to edit. Finally, create a digital certificate in your name and apply an invisible digital signature to the document.

EVALUATION ONLY