



Estimated Time:
1.5 hours

LESSON 9

Sharing Documents

■ OBJECTIVES

Upon completion of this lesson, you should be able to:

- Track changes and add comments.
- Protect documents by restricting access and by restricting revisions and comments.
- Modify printer settings.
- Pause and cancel print jobs.
- Troubleshoot printing problems.
- Prepare documents for electronic distribution.
- Send documents via e-mail or fax.

■ DATA FILES

To complete this lesson, you will need these data files:

Step9-1.docx
Project9-1.docx
Project9-2.docx
Project9-3.docx
Project9-4.docx

■ VOCABULARY

comment
document management server
document workspace
duplex printing
encryption
hard copy
markup
metadata
Portable Document Format (PDF)
read-only document
print queue
soft copy
XML Paper Specification (XPS)

MODULE 2 Key Applications

The development of a document may involve multiple team members. If you collaborate with others to create or edit a document, you can take advantage of many features in Word that help individuals contribute more effectively to the development of the document.



VOCABULARY

markup

HEADS UP

To add a Track Changes button to the status bar, right-click the status bar and then click the **Track Changes** option. A Track Changes button will be added to the status bar, which you can click to toggle the feature on and off.

Revising Documents

In a team effort to create a document, it is common to allow team members to review and edit the document. Tracking changes with revision marks makes it easy to identify the edits. Adding comments is another useful feature which allows reviewers to provide feedback and express opinions without changing the content of the document. The revision marks and annotations that appear in a document are referred to as *markup*.

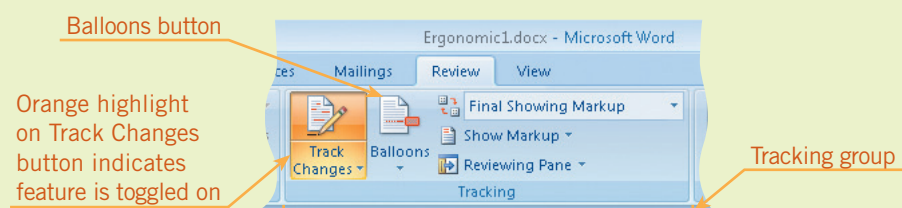
Tracking Changes

When the Track Changes feature is toggled on, all insertions, deletions, and format changes are indicated with revision marks such as font color, underlines, and balloons in the margins. These revision marks are easy to recognize, and they even identify who made the changes and when the changes were made.

Step-by-Step 9.1

1. Start the Word application and open **Step9-1** from the data files. Save the document as **Ergonomic1**. If necessary, change to Print Layout view.
2. Click the **Review** tab and then click the top half of the **Track Changes** button in the Tracking group to toggle on the feature. The feature is on when the button has an orange highlight, as shown in **Figure 9-1**.

FIGURE 9-1
The Tracking group
on the Review tab



3. Position the insertion point at the beginning of the second paragraph that begins *Did you know*. Enter the following two sentences and then press **Enter**.

When you think about using a computer, you don't usually think about comfort and health. But maybe you should.

4. Compare the revision marks in your document to those shown in **Figure 9-2**. With default settings, the new text is identified with an underline, and it also appears in a different font color. A vertical mark in the left margin of the document indicates the lines of text which contain revisions.

Vertical line indicates the lines of text have revisions

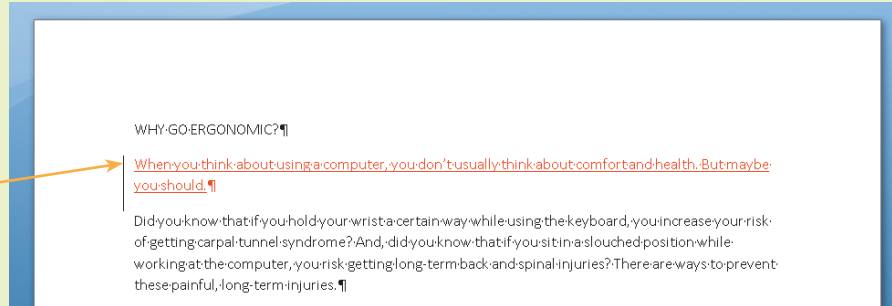


FIGURE 9-2

Markup for inserted text

- Click the **Track Changes** button arrow and then click **Change Tracking Options**. The Track Changes Options dialog box shown in **Figure 9-3** will open. Compare your settings, and make changes if necessary, so your settings match those shown in **Figure 9-3**. Click **OK** to close the dialog box.

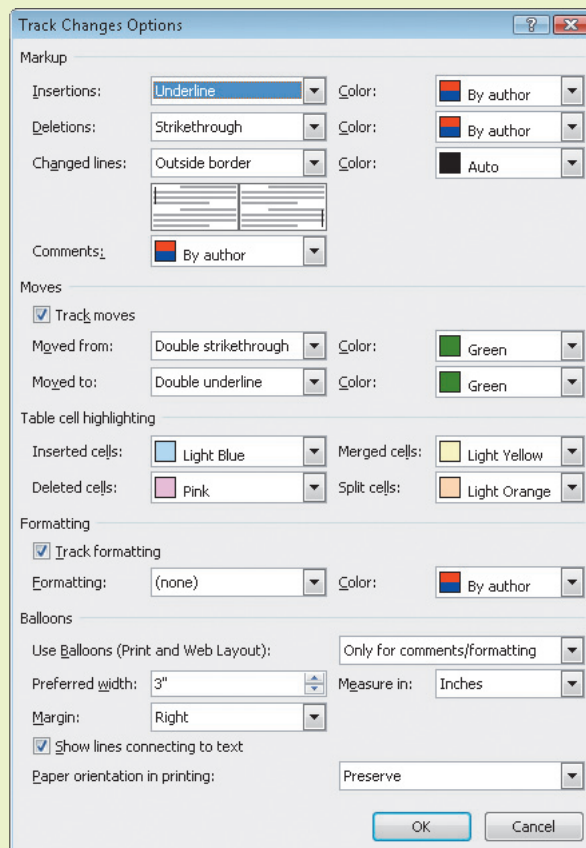


FIGURE 9-3

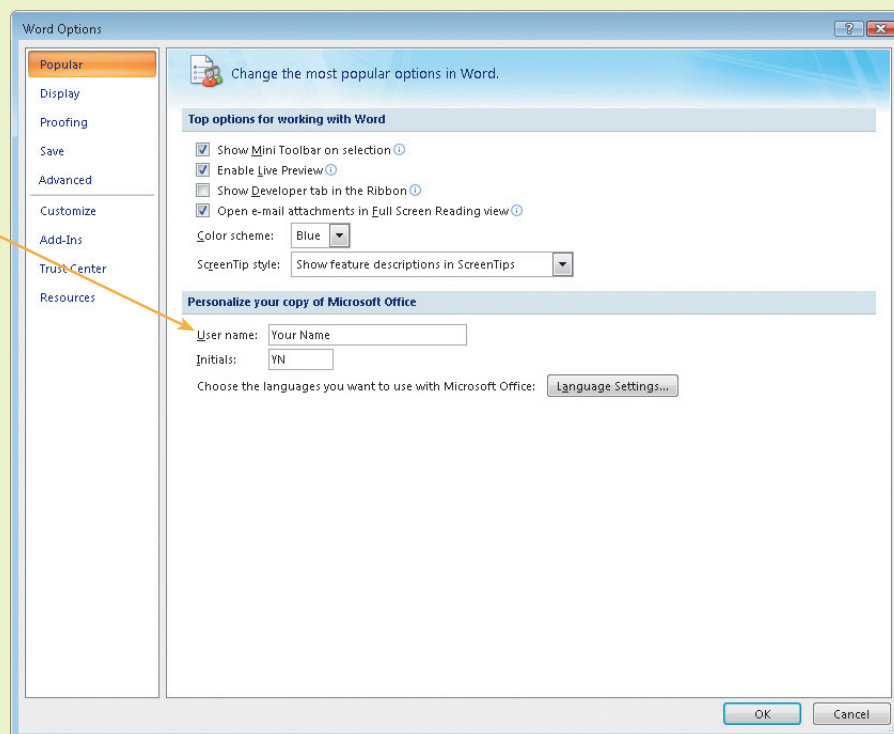
The Track Changes Options dialog box

- In the second sentence in the last paragraph, delete the word *office* and the space that follows so that the sentence reads *Using ergonomic elements will....* The deleted text will remain in the document with a strikethrough format.

7. Position the mouse pointer over the deleted text. A ScreenTip will appear showing a user name, a date, and a time. This helps you identify the reviewer who made the change and when the change was made.
8. Click the **Track Changes** button arrow, and then click **Change User Name**. The Word Options dialog shown in **Figure 9–4** will open. Make note of the user name and the initials. Change the User name to **Reviewer 1** and change the Initials to **R1**. Click **OK** to accept the changes and close the dialog box.

FIGURE 9–4
The Word Options dialog box

Change user
information
here



9. In the first sentence in the fourth paragraph, double-click the word *growing* to select the word and then enter **increase in**. The word *growing* is deleted and the new text is inserted. The markup appears in a different font color to distinguish that this is from a different reviewer, and when you show the ScreenTip you will see that the new reviewer name appears.
10. Click the **Balloons** button in the Tracking group. A list with three options will appear. If necessary, click **Show Only Comments and Formatting in Balloons** to select the option. A check mark will indicate the option is selected. If the option already has a check mark, click in the document window to close the list.

11. Select the entire first line. Click the **Home** tab, apply the bold format, and center the text alignment. Notice that the changes for the character and paragraph formats are identified in balloons in the right margin. The border color for the balloons matches the color for the markup related to this reviewer.
12. Click the **Review** tab, click the **Balloons** button and then click **Show Revisions in Balloons**. The deleted text now appears in a balloon in the right margin. Click the **Balloons** button again, and then click **Show All Revisions Inline**. The insertions and deletions appear in the document window, but the format changes do not show. Click the **Balloons** button and then click **Show Only Comments and Formatting in Balloons** to return to the default setting.
13. Click the **Track Changes** button arrow, and then click **Change User Name**. Change the user name and the initials back to the original setting and click **OK**. This setting change now applies to all Office applications.
14. Deselect the text, save the changes, and leave the document open.

Adding Comments

A *comment* is a note that the author or a reviewer adds to the document. A comment can be inserted anywhere in a Word document. You can choose how the comments will appear in the document and whether or not the comments will be included when you print the document.

VOCABULARY

comment

HEADS UP

If your computer has a microphone, you can record a voice comment. An icon will appear as a sound object inside the comment balloon or in the reviewing pane. To listen to the voice comment, double-click the sound object.

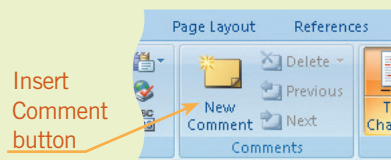
Step-by-Step 9.2

1. If necessary, open **Ergonomic1** from your solution files. Save the document Ergonomic1 as **Ergonomic2**.
2. If necessary, set the document to Print Layout view, click the **Review** tab, and toggle on the Track Changes feature.

3. Select the first two sentences you inserted at the beginning of the document, beginning *When you think*. Click the **Insert Comment** button, shown in **Figure 9–5**.

FIGURE 9–5

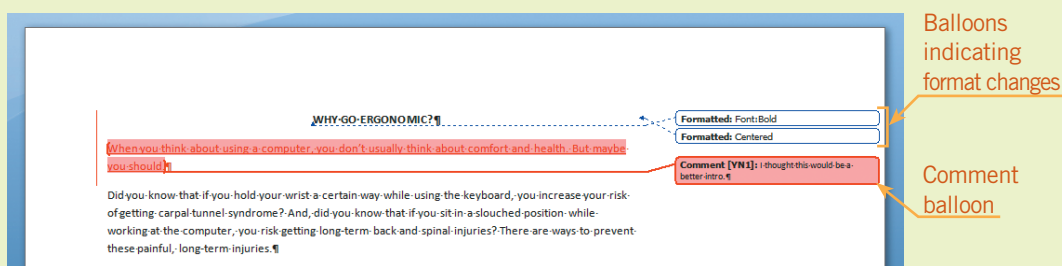
The Comments group on the Review tab




4. You will see shading that highlights the text you selected, and you will also see a dashed line leading to the comment balloon in the margin, as shown in **Figure 9–6**. If you do not select text, the comment will be connected to the word closest to the location of the insertion point.

FIGURE 9–6

Markup showing a comment and format changes



5. The initials at the beginning of the comment text indicate the author of the comment, based on the user information provided in the Word Options dialog box. The number *1* indicates that this is the first comment in the document. With the insertion point positioned in the comment balloon, enter **I thought this would be a better intro..**
6. In the fourth paragraph, double-click the first instance of the word *posture*. Click the **Insert Comment** button, and then enter **My keyboarding instructor made us keep our feet flat on the floor!** in the comment balloon. Notice that the comments are automatically numbered sequentially.
7. Position the mouse pointer over either one of the comments, and a ScreenTip will appear with the reviewer name, and the date and time the comment was added to the document.
8. To show comments and revisions in the Reviewing Pane, click the **Reviewing Pane** button arrow  in the Tracking group, and then click **Reviewing Pane Vertical**. The changes and comments appear at the left side of the document as shown in **Figure 9–7**. You can scroll through the list to view the changes, and you can also edit the comments in the Reviewing Pane.

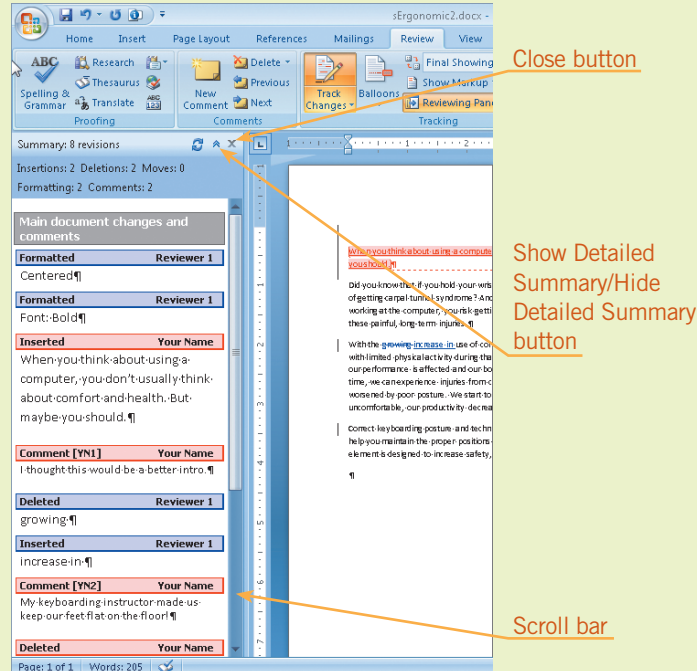


FIGURE 9-7
The Vertical Reviewing Pane

9. At the top of the pane is a summary that shows the number of revisions. If you do not see the details about the summary as shown in **Figure 9-7**, click the **Show Detailed Summary** button.
10. Click the **Hide Detailed Summary** button to hide the summary details.
11. Click the **Reviewing Pane** button arrow in the Tracking group and select **Reviewing Pane Horizontal**. The changes and comments appear at the bottom of the document.
12. Click the **Close** button next to the Show Detailed Summary button to close the Reviewing Pane.
13. Deselect the text, save the changes, and leave the document open.

Showing Markup

Multiple comments and revisions often clutter the document and make it difficult to read. Moreover, if there are multiple users, the revisions may be even more complex to review. You can choose from several options to show the markup. For example, you can choose to show only the edits from a specific reviewer, or you can choose to view only the comments added to the document. To see what the final document will look like, you can hide all of the markup.

There is no limit on the number of reviewers for a document. Word will assign a different color for each of the first eight reviewers. The colors will be reused for additional reviewers beyond the first eight. You can still easily identify reviewers by their initials in the ScreenTips.

HEADS UP

When you move or copy text with a comment, the comment markup is pasted with the text.

Step-by-Step 9.3


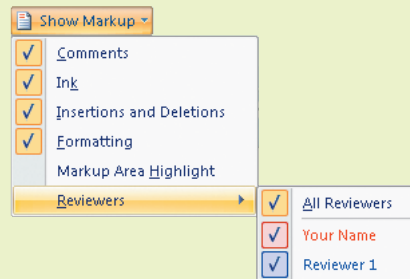

1. If necessary, open **Ergonomic2** from your solution files.
2. If necessary, click the **Review** tab and set the document to Print Layout view.
3. Click the **Show Markup** button  **Show Markup** in the Tracking group. You can choose the type of revisions that you want to review. All types with a check mark will appear in the document.
4. Point to **Reviewers**, the last option, to show the names of the reviewers and their associated colors, as shown in **Figure 9–8**. The default setting shows the comments and changes for all who reviewed the document.

FIGURE 9–8

The Show Markup options with the names of the reviewers



5. Click **Reviewer 1** to uncheck that reviewer name. Now only the changes and comments from the first reviewer will appear in the document.
6. Click the **Show Markup** button, point to **Reviewers**, and then click **All Reviewers** to show all comments and changes.
7. Click the **Display for Review** list arrow  **Final Showing Markup** in the Tracking group on the Review tab. Click **Final**. The document appears on the screen exactly as it will print, with all the revisions accepted and the comments hidden. The markup has not been accepted or removed from the document; it just doesn't appear on the screen.
8. Click the **Display for Review** list arrow again, and then click **Final Showing Markup**.
9. Click the **Office Button**, point to **Print**, and then click **Print Preview**. Print Preview reveals that the revision marks and comments will also print. The document is reduced in size so the comments will also print on the same page. Click the **Close Print Preview** button in the Preview group on the Print Preview tab.

10. Click the **Office Button** and then click **Print** to open the Print dialog box, similar to the one shown in **Figure 9-9**. Notice that the option in the Print what box shows Document showing markup. With this option selected, the revision marks and comments will print, and that's why you saw the markup in Print Preview.

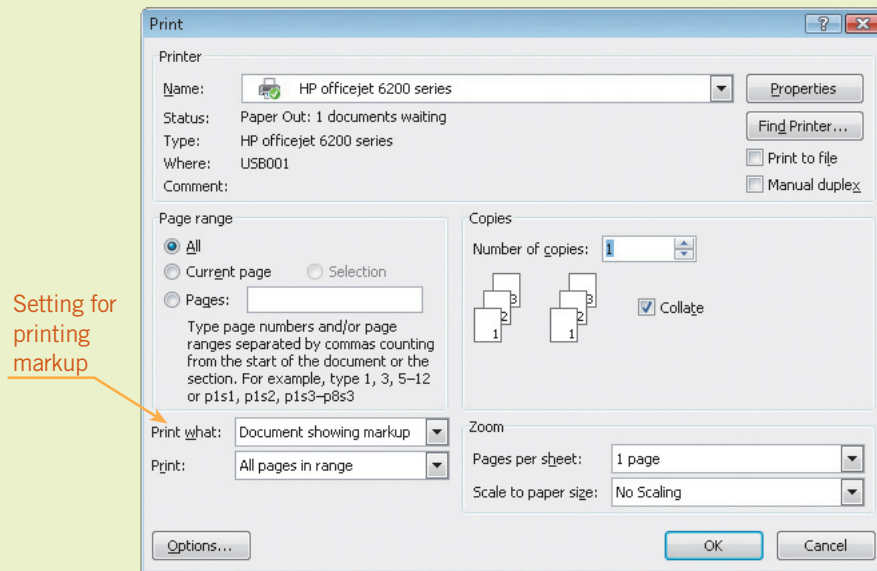



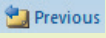



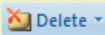
FIGURE 9-9
The Print dialog box

11. In the Print what box, click the list arrow and then click **List of markup**. This option prints a list of all changes, but the document does not print. The list is very similar to the format shown in the Reviewing Pane.
12. Click the **Cancel** button in the Print dialog box to close the dialog box without printing.
13. Click the **Display for Review** list arrow again, and then click **Final**. Return to Print Preview, and you will see that the markup will not appear in the printed copy if the document is sent to the printer when the document is shown on the screen in Final view. Close Print Preview.
14. Click the **Display for Review** list arrow and click **Final Showing Markup**. Leave the document open.

Accepting/Rejecting Changes

After changes and comments are added to a document, the edited document is usually passed on to another person, either the original author or another reviewer, to make a decision about the revisions and comments. That person can decide whether to accept or reject the changes, and they can also remove the comments from the document.

Step-by-Step 9.4

1. If necessary, open **Ergonomic2** from your solution files. Save the document Ergonomic2 as **Ergonomic3**.
2. If necessary, click the **Review** tab and set the document to Print Layout view.
3. Position the insertion point at the beginning of the document. Click the **Next Comment** button  in the Comments group. The insertion point moves to the beginning of the text in the first comment balloon.
4. Click the **Next Comment** button again to move to the second comment in the document. Click the **Previous Comment** button  in the Comments group to move back to the first comment. The Next and Previous buttons in the Comments group help you quickly navigate the comments in the document.
5. Reposition the insertion point at the beginning of the document. Click the **Next Change** button  in the Changes group. The insertion point moves to the first revision in the document, which is the bold format applied to the first paragraph of text.
6. Click the **Next Change** button again. The insertion point moves to the second change in the document, which is the center alignment format for the same paragraph.
7. Click the **Next Change** button again. The insertion point moves to the beginning of the text in the first comment in the document. The Next Change button locates the next revision or comment.
8. Click the **Next Change** button until the word *growing* is selected. Click the top half of the **Accept and Move to Next** button  in the Changes group on the Review tab. The word is deleted and the next revision is selected.
9. Click the **Next Change** button, until the word *office* is selected. Click the **Reject and Move to Next** button  in the Changes group. The text is changed back to its original form, and a prompt appears asking if you want to continue searching from the beginning of the document. Click **OK**.
10. In the Comments group, click the **Next Comment** button, and then click the **Delete Comment** button arrow . Click **Delete All Comments in Document** to remove all the comments from the document.

HEADS UP

If you don't want to review all of the changes and comments in sequence, show the Reviewing Pane, so you can scroll through the list and quickly locate the change or comment. When you click a comment in the Reviewing Pane, the insertion point is moved to that location in the document window.

11. In the Changes group, click the **Accept and Move to Next** button arrow and then click **Accept All Changes in Document**. All revisions are accepted.
12. Save the changes and leave the document open.

Protecting Documents

If a document contains important or even confidential information, you need secure ways to share the information. Word offers features that enable you to control sensitive information and collaborate in confidence.

Restricting Access

Before you share a document, you can save it as a *read-only document*, which will permit others to open and view the document, but they won't be able to make any changes to the document. If you want to permit some users to modify the document, you can create a password which will allow them to save changes to the document. This option doesn't secure the document, but it does limit those who can edit the document. The most secure option is to encrypt the document so it is unreadable without a password. **Encryption** is a standard method for encoding data. When Word encrypts a file, a password is assigned, and then all users must enter the password to open the document.



2-2.2.4

VOCABULARY

read-only document

encryption

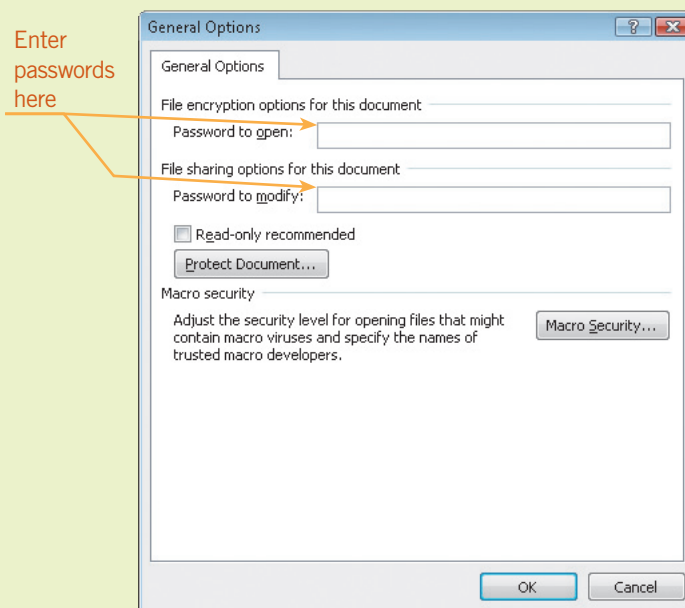
WARNING

If you forget the password, the file cannot be reopened. When you assign a password to a document, write it down and keep the note in a secure place.

Step-by-Step 9.5

1. If necessary, open **Ergonomic3** from your solution files.
2. Click the **Office Button** and then click the **Save As** command to open the Save As dialog box.
3. Click the **Tools** button at the bottom of the dialog box, and then click **General Options** to open the General Options dialog box. You can choose to assign one or both passwords. If you choose to use two passwords, make sure the passwords are not the same.

FIGURE 9–10
The General Options dialog box



4. In the first Password box shown in **Figure 9–10**, enter **jck04290H!**. The document will be encrypted and this password will be required to open the document.
5. In the second password box, enter **AEM#1mx50+**. This password will be required for the user to save changes to the document, but is not related to the encryption process.
6. Click **OK**. When prompted, enter the first password and click **OK**. Enter the second password and click **OK**.
7. In the File name box, change the name to **Ergonomic4** and then click **Save** in the dialog box. Because you created a password in the encryption box, the encryption process will be completed.
8. Close the document, and then reopen the **Ergonomic4** document, using the first password you created in Step 4 above. Users who do not know this password will not be able to access the document.
9. When prompted to enter the password to modify, enter the second password you created in Step 5 above. Users who do not know this password can click the Read Only button to view the document.
10. To remove the encryption, click the **Office Button**, click **Save As**, click **Tools**, and then click **General Options**. Delete all the characters in the two password boxes and then click **OK**.
11. In the File name box, change the filename to **Ergonomic5** and click **Save**. There is no restricted access for the Ergonomic5 document.
12. Leave the document open.

EXTRA FOR EXPERTS

It is recommended that passwords include a combination of text, numbers, and symbols and be at least eight characters in length—the more characters the better. In this dialog box, you can enter up to 15 characters.

Restricting Formatting and Edits

Even when you choose to allow others to make revisions and add comments, you can still be selective about who is allowed to make edits as well as the types of edits they can make.

Step-by-Step 9.6

1. If necessary, open **Ergonomic5** from your solution files.
2. Click the **Review** tab and then click the **Protect Document** button in the Protect group at the far right side of the Review tab. The task pane shown in **Figure 9–11** will open.

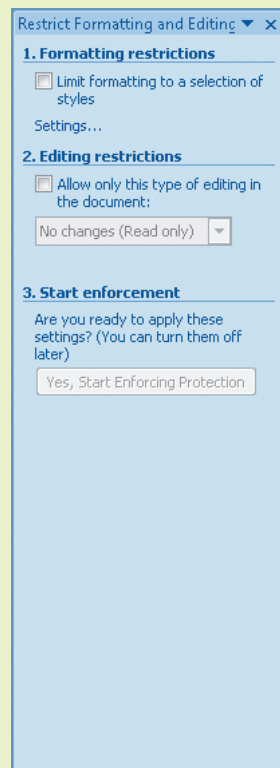


FIGURE 9–11
The Restrict Formatting and Editing task pane

3. Under 2. Editing restrictions, click to enable the option **Allow only this type of editing in the document:**. The option will show a check mark when enabled. New Exceptions options appear in the task pane, and the current Editing restrictions setting is No changes (Read only).
4. Under Editing restrictions, click the list arrow next to No changes (Read only) and then click **Tracked changes**. Notice that the options in the task pane change again. When the Tracked changes option is enabled, reviewers can make revisions and also add comments to the document.

5. Click the **Editing restrictions** list arrow again and click **Comments**. New Exceptions options appear again in the task pane. With the Comments option enabled, you can make exceptions and allow specified reviewers to edit all or part of the document.
6. Click the **Editing restrictions** list arrow and click **Filling in forms**. When this option is enabled, the exceptions are not available, and users cannot track changes or add comments.
7. Click the **Editing restrictions** list arrow and click **No changes (Read only)**.
8. Select the first four paragraphs in the document, including the title. Then click **Everyone** under Exceptions (optional). The option will show a check mark when enabled. Anyone with access to the document can edit the selected paragraphs.
9. Click anywhere in the last paragraph of text. Notice that the check mark no longer appears next to the Everyone option. With this setting, no users would be permitted to edit this part of the document.
10. Select the last paragraph in the document and then click to enable the **Everyone** option.
11. Point to the **Everyone** option. A list arrow will appear. Click the list arrow and then click **Remove all editing permissions for this user**. With this setting, no one can edit any part of this document.
12. Under 3. Start enforcement, click **Yes, Start Enforcing Protection**. Enter the password **88*A*03*13/** in the first box. Click in the second password box, reenter the password, and click **OK**.
13. Click the **Close** button in the top right corner of the Restrict Formatting and Editing task pane.
14. Save the changes and leave the document open.

HEADS UP

To remove the restrictions from a document, click the Stop Protection button at the bottom of the Restrict Formatting and Editing task pane. You will be prompted to enter the password, and then the restrictions will be disabled.



2-1.4.1
2-1.4.3
2-1.4.4
2-1.4.5

VOCABULARY

hard copy

Preparing a Document for Printing

After the document is finalized, you can prepare a *hard copy*—a printed copy—of the document to share the information. Often, multiple copies are prepared and distributed. Your system may have two or more printers available, including inkjet printers, laser printers, fax programs that also serve as a type of printer, and others. The benefit of having more than one printer to choose from is that different printers offer different features.

Selecting Print Options

Many people use their printer default settings, and they're not aware of all the additional features and options that are available. Most printers have settings for adjusting the printing speed and the print quality. Some printers provide special features like *duplex printing*, which is printing on both sides of the page. Of course, you can manually feed the paper back into the printer to print the back side of the page, but it's very convenient when the printer will do that automatically. Another time-saving print option is to collate, which automatically arranges the pages in the proper order when you print several copies of a multi-page document. Deciding which printer to use is usually not the challenge; finding the printer options is.

Showing the Print Queue

The *print queue* shows information about documents that are waiting to print. When you open the print queue, you can see the sequence of the active print jobs, the document owner, and the number of pages to print. In addition to viewing the status and information about the waiting print jobs, you can also use the print queue to pause, resume, restart, or cancel print jobs.

HEADS UP

To access the printer properties, you might need to click a button in the Print dialog box labeled Properties.

VOCABULARY

duplex printing

print queue

Step-by-Step 9.7

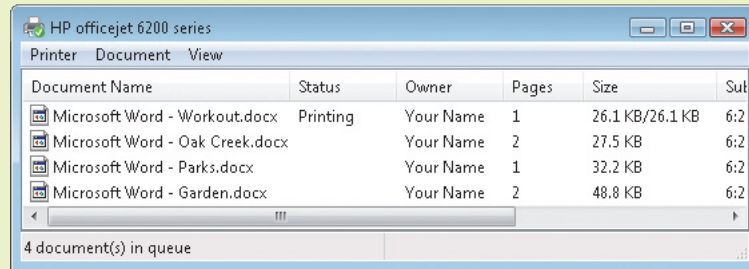
1. If necessary, open **Ergonomic5** from your solution files.
2. Click the **Office Button** and then click the **Print** command to open the Print dialog box. Notice the printer name shown in the Name text box in the Printer section of the dialog box. This is your system's default printer.
3. Click the list arrow in the Name text box to access a list of other printers available on your system. Click any of the printer names to change from the default printer to a different printer for this job.
4. Under Page range, click to select **Pages** and enter **2** in the text box to the right. Under Copies, change the Number of copies to **3**. This setting indicates that three copies of the second page will print.
5. Click the **Properties** button. Options will vary depending on the printer selected, but they will most likely include paper size, print quality, and color management.
6. Click **Cancel** to close the Properties dialog box, and then click **Close** to close the Print dialog box without printing. Do not print the document.

HEADS UP

To quickly open the print queue during the print process, double-click the printer icon in the tray on the right side of the task bar.

FIGURE 9-12

The print queue with documents waiting to print



7. Click the **Start** button, click **Control Panel**, click **Hardware and Sound**, and then click **Printers**. A check mark next to the printer name identifies the default printer. Double-click the name of the printer you are using. A printer dialog box showing the print queue, similar to the one shown in **Figure 9-12**, will open.
8. If you are the only one accessing the printer, the print queue may already be empty by the time you open it. However, if multiple documents are waiting to print on the printer you selected, the print queue will look similar to the one shown in **Figure 9-12**, which shows multiple documents waiting to be printed.
9. To cancel a print job, you would select the job(s) in the list. You don't have a document to select, but you can look at the commands. Click **Document** in the menu bar.
 - a. Cancel removes the document from the print queue. The current printer job may take a while to cancel, and it may finish printing without canceling, but the remaining jobs in the list will be cancelled.
 - b. Pause stops the document from being printed, but the document is not removed from the queue.
 - c. Resume restarts the printing process for the selected document.
10. Close the print queue dialog box and any Control Panel windows, and close the document.

Troubleshooting Common Printing Problems

Even when using Print Preview, there are times when the print results do not meet expectations. This could be due to a variety of different things, as shown in **Table 9-1**.

TABLE 9-1 Troubleshooting printer problems

PROBLEM	CAUSE/SOLUTION
The entire document does not print, or some of the document looks blurry and faded	If the colors don't print correctly, the printer may be low on or out of ink or toner
The document doesn't look the same	Sometimes the font in your document might not be available on the printer you are using; change the font in your document to a TrueType font, which looks the same on the printed page as it does on the screen, or change the font to one that is available on your printer
The layout looks wrong	<ul style="list-style-type: none"> You may be printing a document that was created with a different version of Microsoft Word or was formatted for different printer settings, such as margins and paper size Some printers will not print documents with margins less than 0.5" To have Word format the document to your printer's paper size for this printing session only, open the Print dialog box and then show the printer properties; choose the appropriate paper size and scale the document to fit the paper size
Nothing happens	<ul style="list-style-type: none"> Check the print queue; your document may be blocked by one or more documents waiting to be printed Make sure the printer is not out of paper Make sure the printer is connected to the computer, the printer power is turned on, and the printer is online Make sure the printer cable is connected to the right port Check for paper jams Open the Print dialog box and confirm that the correct printer shows in the Printer Name text box Run the Windows Printing Troubleshooter; click the Start button, click Help and Support, enter printing troubleshooter in the Search box, and then select the problem or problems you are having and follow the instructions
You don't get a printed document, and Microsoft Word itself stops responding	It is likely that printer is not installed or you do not have the correct printer driver; you can try installing an updated printer driver from the printer's manufacturer to resolve this problem

Sharing Electronic Files

The use of computers and telecommunications in the workplace has changed how we work. The majority of the information we work with is now generated by email and electronic files. Instead of producing a hard copy of a document, it is now common practice to share a soft copy. A *soft copy* is a digital copy of data, such as a file viewed on a computer's display or shared via an e-mail attachment.



2-1.4.6
2-1.4.7

VOCABULARY
soft copy

Preparing Documents for Electronic Distribution

VOCABULARY

metadata

HEADS UP

Be sure to check if a document is linked with other information sources, such as databases or spreadsheets, to avoid unintentionally sending or publishing information about the linked data.

You may want to control what others can see in the document. For example, you may not want them to see the author of the document or the date the document was created. Information like this is referred to as *metadata*—data that describes other data—and although it is invisible, it is still easy to find.

If you know the reviewers of the document are working with an older version of Word, you can choose to save the document in a previous Word version format. Be aware, though, that when you save the document in the older format, some information and/or formatting may be lost.

Step-by-Step 9.8

1. Open **Ergonomic2** from your solution files and save the document Ergonomic2 as **Ergonomic6**.
2. Click the **Office Button**, point to **Prepare**, and then click **Properties**. The Document Information Panel shown in **Figure 9–13** will appear at the top of the document window, showing information about the author, title, subject matter, keywords, and so on. This information can be updated and is useful when searching for documents.

FIGURE 9–13
The Document
Information Panel

Click here to
show
Advanced
Properties

3. To update the information, click in the **Title** box and enter **Why Go Ergonomic?** Click in the **Subject** box and enter **increase safety, comfort, and productivity**.
4. Click the **Document Properties** list arrow and then click **Advanced Properties**. Click the **Statistics** tab in the document Properties dialog box, as shown in **Figure 9–14**. Notice that this information includes the number of times the document has been revised and the total editing time.

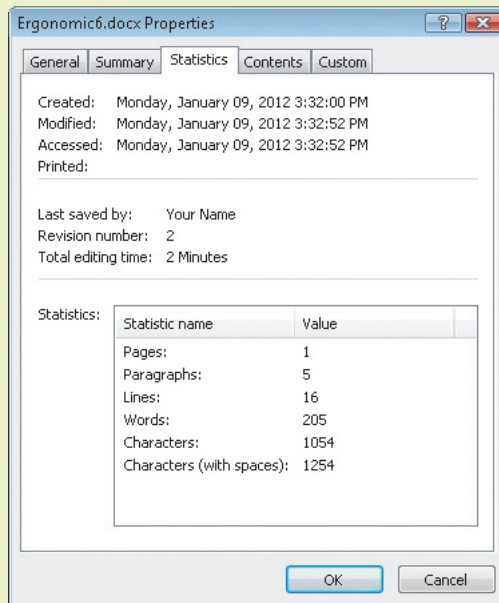


FIGURE 9–14

The Statistics tab in the document Properties dialog box

5. Click **OK** or **Cancel** to close the dialog box. Then, close the Document Information Panel by clicking the **Close** button in the top right corner.
6. Click the **Office Button**, point to **Prepare**, and then click **Inspect Document**. When prompted to save the changes, click **Yes**.
7. The Document Inspector dialog box shown in **Figure 9–15** opens. Word proposes some features to check.

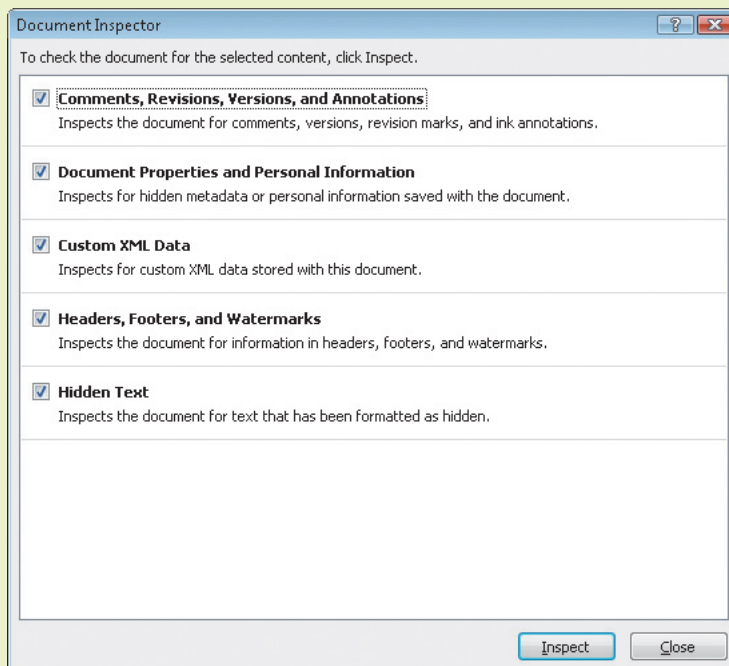


FIGURE 9–15

The Document Inspector dialog box

8. Click **Inspect** at the bottom of the dialog box. The inspection results appear. You want to leave the revision marks in the document, so don't make any changes regarding the markup. However, you do want to remove the personal information, so click **Remove All** in the Document Properties and Personal Information section.
9. Close the Document Inspector dialog box and save the changes to the document. Notice when you save the changes that the initials in the comment balloons change to *A1* and *A2*. Position the mouse pointer over a markup for a revision in the document. The name of the reviewer has been changed to *Author*, and all the markup is the same color. Removing the personal information made the comments anonymous.
10. Click the **Office Button**, point to **Prepare**, and then click **Properties**. Notice that all the personal and property information has been removed.
11. Click the **Document Properties** list arrow, click **Advanced Properties**, and if necessary, click the **Statistics** tab. Much of the data is still visible, but the name of the user who last saved the document has been removed, as well as the total editing time.
12. Click **OK** or **Cancel** to close the Properties dialog box.
13. Save the changes and close the document.

VOCABULARY

Portable Document Format (PDF)

XML Paper Specification (XPS)

Saving the Document in a PDF or XPS Format

When sharing documents with others, you need to consider that not all users will be using Word 2007. They may be working with different applications, platforms, and operating systems, so before distributing the soft copy, you need to choose an appropriate format so they will be able to access the file.

The **Portable Document Format (PDF)**, created by Adobe Systems in 1993, is commonly used. Microsoft included the **XML Paper Specification (XPS)** format in the Office 2007 applications. Both document formats are designed to preserve the visual appearance and layout of each page, and they enable fast viewing and printing. These document formats are especially useful for resumes and newsletters because the appearance of each page is unchanged and the document will print exactly as intended.

HEADS UP

A computer must be properly configured to output or receive and open documents as a PDF, XPS, fax, e-mail attachment or Web page. Microsoft provides a free add-in that you can download so you can use the XPS and PDF format.

Step-by-Step 9.9

1. Open **Ergonomic3** from your solution files.
2. Click the **Office Button**, point to **Save As**, and then click **PDF or XPS**. The Publish as PDF or XPS dialog box will open.
3. In the File name box enter **Ergonomic7**.
4. In the Save as type box, click the list arrow and then click **XPS Document (*.xps)**.
5. Click **Publish**. The document will open in XPS format in Internet Explorer, if you use that as your default browser.
6. Drag across some text to select it. Press **Delete**. The read-only format will not allow any changes.
7. Close the browser and leave the Ergonomic3 document open.

Sending and Publishing Documents

When distributing electronic copies of the document, you can choose to send the content in an e-mail message or in a fax message, or you can send the file as an attachment to an e-mail message. Of course, you must be connected to a network or the Internet, and you must have sufficient bandwidth (the speed of data transfer) for transferring the electronic files.

Another way to distribute a document is to publish the document to a *document management server*, which is a central location for storing, managing, and tracking files. Some document management servers, like Windows SharePoint Services, also provide features to help organizations manage business processes. Documents are stored in a library, and access to those documents and the rights of users can be controlled. For example, the files can be encrypted and users must know the password to open folders or files.

Word makes it easy for you to create a document workspace where you can make the document available. A *document workspace* is a Windows SharePoint Services Web site that provides tools for sharing and updating files and keeping colleagues informed about document status. You can publish the document at the Web site and keep the local document on your computer synchronized with the changes and updates.

You must have authorization to publish or access files at a Microsoft Windows SharePoint Services Web site. Therefore, using document management server and new document workspace features is beyond the scope of this lesson.

Publishing to a blog is another alternative. You will learn more about creating blog posts in Lesson 16.

VOCABULARY

document management server

document workspace

Step-by-Step 9.10

HEADS UP

When you choose the E-mail as PDF Attachment or the E-mail as XPS Attachment option, the document will be sent in that format.

1. If necessary, open **Ergonomic3** from your solution files.
2. Click the **Office Button**, point to **Send**, and then click **E-mail**. If Microsoft Outlook is your default e-mail application, a new message window will open. If Outlook is not your default e-mail application, most likely your e-mail application will open with a new message form.
3. The document is already attached to the e-mail message. Close the message document window without saving any changes.
4. Click the **Office Button**, point to **Publish**, and then click **Document Management Server**. The Save As dialog box will open with My Network Places already selected. At this point you would navigate to the server space and click Save, and the document would be uploaded to document management server.
5. Click **Cancel** to exit the dialog box.
6. Click the **Office Button**, point to **Publish**, and then click **Create Document Workspace**. The Document Management task pane will appear on the right side of the screen. Here you would enter a name for the workspace and the URL for the location.
7. Close the Document Management task pane.
8. Close the document and the application. If prompted to save changes to the document, click **No**.

ETHICS IN TECHNOLOGY

Computer use is a privilege, and it imposes certain obligations and responsibilities. The behavior, courtesy, and etiquette expected in verbal and written communications is extended to electronic communications. When sharing documents, users must maintain integrity and discipline themselves to do what is right. It is important that shared documents are maintained in a manner that is accurate and honest.

Only view and edit the files which you are authorized to access. Do not move, alter, or delete documents without permission. Respect the property of others. The use of the documents should be limited to the intended objectives, and release of information without permission is unethical. Passwords are used to restrict access, so do not share passwords with those who are not authorized to access the files. To protect confidential information, remove metadata and follow the correct procedures to keep the information secure.

SUMMARY

In this lesson, you learned:

- Tracking changes with revision marks makes it easy to identify who made the changes and when the changes were made.
- Reviewers can provide feedback without changing the content by adding comments to the document.
- You can choose the markup that you want to appear on the screen and when the document is printed.
- Revisions can be accepted or rejected, and comments can easily be removed from the document.
- You can protect documents by restricting access and by restricting revisions and comments.
- You can change your default printer and printer settings using the Print command.
- You can view, pause, and cancel print jobs waiting in the print queue.
- When sharing documents with others, you need to choose the appropriate document format.
- Before distributing a soft copy of a document, you may want to remove metadata.

VOCABULARY REVIEW

Define the following terms:

comment	hard copy	print queue
document management server	markup	soft copy
document workspace	metadata	XML Paper Specification (XPS)
duplex printing	Portable Document Format (PDF)	
encryption	read-only document	

REVIEW QUESTIONS

TRUE / FALSE

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

- T F 1. When tracking changes, insertions are always blue and deletions are always strikethrough.
- T F 2. When showing markup for multiple reviewers, you can choose to show revisions for only one of the reviewers.
- T F 3. You can restrict formatting changes for a portion of a document.
- T F 4. Adding comments to a document allows reviewers to provide feedback and express opinions without changing the content of the document.
- T F 5. An easy way to restrict access to a file is to assign a password.

MULTIPLE CHOICE

Select the best response for the following statements.

1. Duplex printing is _____.
- A. when your computer has access to two printers on the system
 - B. a special printer feature for automatically printing two copies of each page in the document
 - C. a special printer feature for automatically printing content on both sides of the page
 - D. when you manually reload paper in the printer to print on the back side of the page

2. _____ is invisible data in a document that describes other data.
 - A. Hidden text
 - B. Metadata
 - C. Transparent text
 - D. Soft copy
3. When a document is encrypted, _____.
 - A. the user can view the document but cannot make any changes to the document
 - B. the user must enter a password to open the document
 - C. all personal information is removed from the document
 - D. the document will open in most applications, operating systems, and platforms
4. If you don't want others to make changes in your document, you should save the document as _____.
 - A. a read-only document
 - B. an XPS document
 - C. a PDF document
 - D. any of the above
5. _____ can be viewed in a balloon in the margin or in the Reviewing Pane.
 - A. Insertions
 - B. Comments
 - C. Deletions
 - D. any of the above

FILL IN THE BLANK

Complete the following sentences by writing the correct word or words in the blanks provided.

1. The _____ shows information about documents that are waiting to print.
2. A(n) _____ provides tools for sharing and updating files and keeping colleagues informed about document status.
3. The revision marks and annotations that appear in a document are referred to as _____.
4. _____ is a standard method for encoding data.
5. A digital copy of data, such as a file viewed on a computer's display or shared via an e-mail attachment, is referred to as a _____.



PROJECTS

PROJECT 9–1

1. Start the Word application and open the data file **Project9-1**. Save the document as **Facilities1**.
2. Toggle on the Track Changes feature.
3. Make note of the current user name and initials, and then change the user name to **Top Chief** and change the user initials to **TC**.
4. Add the following three items in the bulleted list, in the correct alphabetical order: **pilates classes**, **strength and conditioning**, and **yoga classes**.
5. Select *pilates* and insert the comment **Should this be initial caps?**.
6. In the first paragraph, find the text *help people* and following that text, insert **of all ages**.
7. In the last sentence of the first paragraph, find the text *assist patients* and add **both young and old**.
8. Find and replace all occurrences of *rehab* with **rehabilitation**.
9. Find all occurrences of *clinics* and replace them with **facilities**.
10. Save the changes to the document, and then toggle off the Track Changes feature.
11. Save the document as **Facilities2**.
12. Inspect the document and remove the personal information. Do not remove the revision marks and comments. Check the document properties to make sure all the personal information was removed.
13. Restore the user name and initials to what they were before you changed them in Step 3.
14. Save the changes to the document and then close the document.

PROJECT 9–2

1. Open the data file **Project9-2** and save the document as **Furniture1**.
2. Show only the insertions and deletions in the document.
3. Move to the first revision and reject the change.
4. Move to the second revision and accept the change.
5. Show the markup for comments and formatting.
6. Delete all the comments in the document.
7. Accept all changes in the document.
8. Save the changes, and then save the document as **Furniture2** in the PDF format. The document will open in Adobe Reader if the application is installed on your computer.
9. Close the Adobe Reader window and the Furniture1 document.

PROJECT 9–4

1. Open the data file **Project9-4** and save the document as **Safety**.
2. Show the Document Information Panel. Enter the title **Work Place Safety** and then enter the subject **industrial ergonomic assessment**.
3. To secure the document and limit access, encrypt the document by assigning the password **BLP9VJ5TMP**.
4. Save the changes and close the document.
5. Attempt to open the document to make sure a password is required. When the Password dialog box appears, click **Cancel**, and then close the application.

PROJECT 9–3

1. Open the data file **Project9-3** and save the document as **Walking**.
2. Protect the document by setting editing restrictions for **No changes (Read only)**. Make exceptions for **Everyone** to edit the last two paragraphs in the document.
3. Start enforcing the protection by assigning the password **Mac@57MCV7**.
4. Close the Restrict Formatting and Editing pane.
5. Save the changes to the document and then close the document.
6. Open the document and make sure the restrictions are applied as intended. Delete the last paragraph.
7. Save the changes and close the document.



TEAMWORK PROJECT

The document you worked with in Project 9-3 provided information about exercising in both hot and cold weather. Many people have preferences for warm or cool weather for a variety of reasons. Team up with a partner to explore these reasons.

1. With your partner, decide who will take the warm weather topic and who will take the cool weather topic. If both of you prefer the same season, flip a coin to make the decision.
2. Using Word, create lists of advantages and disadvantages of your chosen climate. If you live in a climate that is more or less warm all year round, use your imagination to list the advantages and disadvantages of cold weather.
3. Exchange documents and review your partner's list. Track changes and edit the document to include your opinions. Add comments where appropriate.
4. Review the changes and comments your partner added to your document. Accept or reject each revision, and delete the comments. Make any other edits to make your argument stronger.
5. After finalizing your documents, share them with each other again and discuss with your partner whose arguments are more persuasive.

CRITICAL THINKING

ACTIVITY 9–1

If the colors fade or are inconsistent when you print a page, it's possible that the printer is low on ink or toner. The cartridges are expensive, however, so you don't want to replace them until they are empty. So, how do you know the amount of ink or toner available in the cartridge(s)? Printers vary, and there is no universal answer for this question. Explore the properties (or preferences) for the printer connected to your computer to locate the estimated levels of ink or toner your printer. When you find the information, create a list of steps that describe how you can check the level of ink or toner for your printer.

ONLINE DISCOVERY

In this lesson you worked with several documents that referenced ergonomic elements. Search the Internet for *ergonomic computer*

ACTIVITY 9–2

Further explore the properties for a printer connected to your computer. Identify one of the special features that interests you the most, such as printing posters, adjusting the volume of ink for faster drying time, or printing in grayscale. Examine the feature and options and use the Help screens to aid you in learning the purpose of the feature. Then write a short description about the feature and explain when you would use this feature.

accessories and make a list of items that are designed to create an ergonomic computer workstation.