## 2. Create and manage documents

#### In this chapter

- Create documents
- Open and move around in documents
- Display different views of documents
- <u>Display and edit file properties</u>
- Save and close documents

#### **Practice files**

For this chapter, use the practice files from the Word2016SBS\Ch02 folder. For practice file download instructions, see the introduction.

You can use Word 2016 to create many different types of documents, for many different purposes. Word is widely used in schools, businesses, and organizations of many kinds to create letters, newsletters, reports, resumes, and other documents that contain text. Word provides a lot of flexibility in document design, so you can also create documents that contain images and content that doesn't fit a standard sheet of paper, such as trifold brochures, greeting cards, business cards, certificates, and signs.

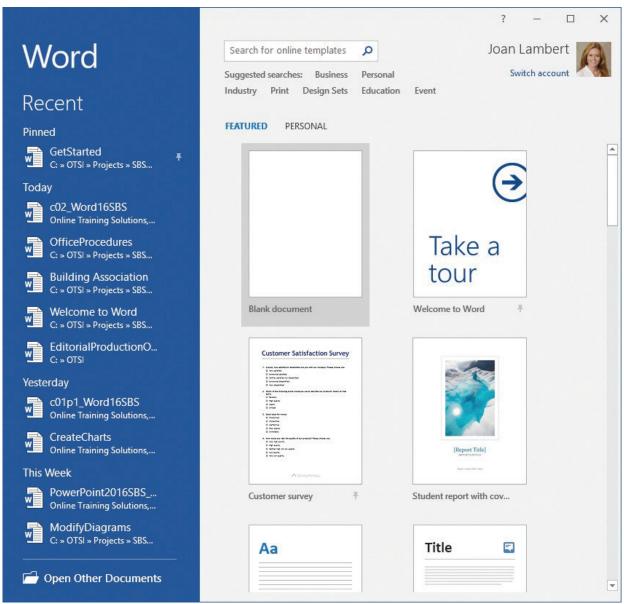
You can open and work with documents from a variety of locations. Word 2016 introduces methods of quickly accessing documents from multiple computers that can save you time and conserve storage space. When working in a Word document, you can display different views of the content and the document structure, and use different methods to move around within the document. You can also display and modify the information that is stored with each file (its properties).

This chapter guides you through procedures related to creating documents, opening and moving around in documents, displaying different views of documents, displaying and editing file properties, and saving and closing documents.

#### **Create documents**

When creating a document in Word, you can create a blank document of the default file type or create a document based on one of the templates provided with Word. Each template incorporates specific design elements such as fonts and colors. Many templates also include typical information that you can modify or build on to create a useful document.

When you start Word, the app displays a Start screen that gives you options for opening an existing file or creating a new one.



The Start screen appears by default but can be disabled

If you create custom templates and save them in your Personal Templates folder, Featured and Personal links appear below the search box. You can click these links to switch between viewing app-supplied templates and your own.

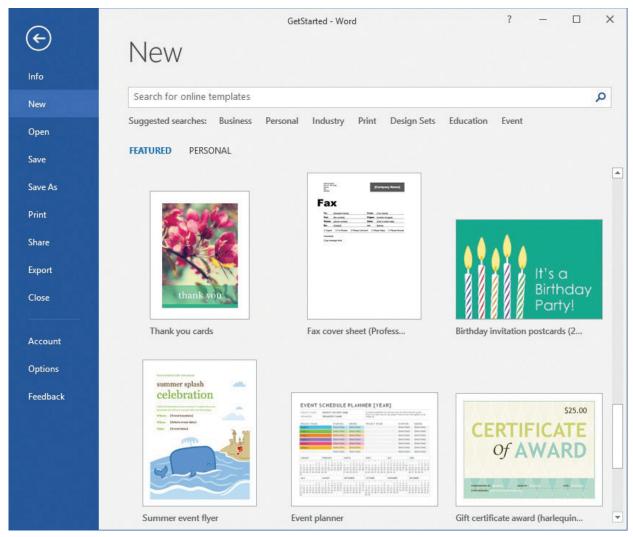
# SEE ALSO

For information about creating custom templates, see "<u>Create and attach templates</u>" in <u>Chapter 15</u>, "<u>Create custom document elements</u>."



The document templates that are available in Word include standard templates that have been available for many years, and featured templates that change occasionally. The templates on the New page of the Backstage view in your installation of Word might be different from those shown in images in this book.

If you're already working in Word, you can create a new document from the New page of the Backstage view. The same templates and search options are available from both pages.



Word provides document templates for a wide variety of purposes

You can start from a blank document that contains one page. You can then add content, apply structure and design elements, and make any necessary configuration changes.

New blank documents are based on the built-in Normal template. You can save time by basing your document on a content template, and then customizing the content provided in the template to meet your needs.

Many templates are available when you're working in Word 2016. Most are for specific types of documents, and many are pre-populated with text, tables, images, and other content that you can modify to fit your needs. A few of the templates are installed on your computer with Word. Many more templates are maintained on the Microsoft Office website, but you can locate and use them directly from within Word (provided you have an Internet connection).

The available templates vary depending on whether you're working online or

offline:

■ When you're working online (that is, when your computer has an active Internet connection, whether or not you're using it to do anything else), the New page displays thumbnails of featured templates. These vary based on the season; for example, they might include holiday-specific or season-specific templates for creating announcements, invitations, and newsletters. The search box at the top of the page is active; you can enter a search term to display related online templates, or click a category below the search box to display online templates in that category.

■ When you're working offline, the New page displays only templates that are stored on your computer. These include any templates that you have already used, and a selection of letter, newsletter, report, and resume templates. The search box is unavailable (you can only search the offline templates by scrolling through the thumbnails on the New page).

Word document templates contain elements such as the following:

- **Formatting** Most templates contain formatting information, which in addition to styles can include page layout settings, backgrounds, themes, and other types of formatting. A template that contains only formatting defines the look of the document; you add your own content.
- **Text** Templates can also contain text that you customize for your own purposes. For example, if you base a new document on an agenda template from Office.com, the text of the agenda is already in place, and all you have to do is customize it. Sometimes, a document based on a template displays formatted text placeholders surrounded by square brackets—for example, [Company Name]—instead of actual text. You replace a placeholder with your own text by clicking it and then typing the replacement. If you don't need a placeholder, you can simply delete it.
- **Graphics, tables, charts, and diagrams** Templates can contain readymade graphic elements, either for use as is or as placeholders for elements tailored to the specific document.
- **Building blocks** Some templates make custom building blocks, such as headers and footers or a cover page, available for use with a particular type of document. They might also include AutoText, such as contact information or standard copyright or privacy paragraphs.



For information about working with building blocks, see "<u>Insert preformatted document parts</u>" in <u>Chapter 9</u>, "<u>Add visual elements</u>," and "<u>Create custom building blocks</u>" in <u>Chapter 15</u>, "<u>Create custom document elements</u>."

■ **Custom tabs, commands, and macros** Sophisticated templates might include custom ribbon tabs or toolbars with commands and macros that are specific to the purposes of the template. A macro is a recorded series of commands that permits a user to perform a process with the click of a button. The topic of macros is beyond the scope of this book; for information, refer to Word Help.



Word 2016 template files have one of two file name extensions, depending on their content. Those that contain macros have the .dotm file name extension; those that don't contain macros have the .dotx extension.

When you base a new document on a template, that template is said to be *attached* to the document. The styles defined in the attached template appear in the Styles pane so that you can easily apply them to any content you add to the document. You can change the document template by attaching a different one.

# SEE ALSO

For information about attaching templates to existing documents, see Chapter 15, "Create custom document elements."

#### To create a new blank document

- 1. Start Word.
- 2. When the **Start** screen appears, press the **Esc** key.

Or

- 1. If Word is already running, click the **File** tab to display the Backstage view.
- 2. In the left pane of the Backstage view, click **New** to display the New page.
- 3. On the New page of the Backstage view, click the Blank document

thumbnail.

#### To preview design templates

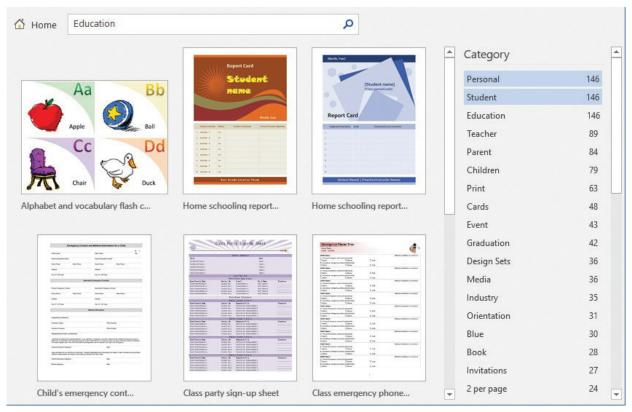
- 1. Display the **New** page of the Backstage view.
- 2. On the **New** page, scroll the pane to view the design templates that were installed with Word.
- 3. Click any thumbnail to open a preview window that displays a sample document page.
- 4. Do any of the following:
  - To create a document based on the template that is active in the preview window, click the **Create** button.
  - To view the next template, click the arrow to the right of the preview window; to view the previous template, click the arrow to the left.
  - To close the preview window without creating a document, click the **Close** button in the upper-right corner of the preview window.

#### To create a document based on an installed template

- 1. Display the **New** page of the Backstage view.
- 2. Scroll the pane to locate the design you want to use.
- 3. Double-click the thumbnail to create the document.

## To create a document based on an online template

- 1. Display the **New** page of the Backstage view.
- 2. Do either of the following to display templates related to a specific topic:
  - In the search box at the top of the page, enter a term related to the template content or design you're looking for, and then click the **Search** button.
  - Below the search box, click one of the suggested searches.
- 3. In the **Category** list, click any category or categories to further filter the templates. Active category filters are indicated by colored bars at the top of the Category list.



Clicking multiple categories applies multiple filters

- 4. Scroll the pane to locate a design that fits your needs.
- 5. Double-click any thumbnail to create a file based on the template.

## To remove a template search filter

- 1. Do either of the following:
  - In the **Category** list, point to the applied filter, and then click the **X** that appears to the right of the category name.
  - Double-click the category name.

#### To clear a template search

1. To the left of the search box, click the **Home** button.

## **Open and move around in documents**

The Start screen that appears by default when you start Word displays a list of documents you worked on recently, and a link to open other existing documents.

#### **Open existing documents**

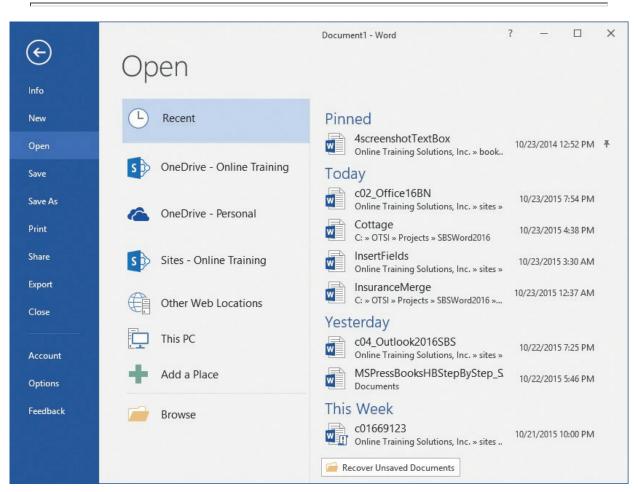
If the document you want to open appears on the Start screen, you can open it directly from there. Otherwise, you can open documents that are stored locally

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on your computer, or in a remote storage location such as a Microsoft OneDrive folder or a Microsoft SharePoint document library, either from within Word or from the document storage location.



If you receive a document as an attachment to an email message, you can open the attached document and start Word, if it isn't already running, from within Outlook 2016, or you can preview the document content directly in the Outlook Reading pane without starting Word.



The Open page includes all the locations you've linked to from Office apps

The Open page displays only documents that are saved in the Word-specific file formats (.docx and .doc), and templates created for those standards. For more information about file formats, see "Save and close documents" later in this chapter.

The Recent list in the right pane of the Open page provides quick access to the documents you've worked with recently. The Recent list includes locally stored documents and documents that you've worked with while signed in with your current account on any computer, tablet, or other device, if the documents are stored in a shared location. This is one of the tremendous benefits of the Office 365 subscription model and the cloud storage that comes with it—you can be up and running on a new computer in minutes, without having to move files or configure settings and preferences. If you use multiple computers, you can use this very convenient feature to seamlessly transition between computers without having to actually transport files (on a USB flash drive or hard drive) or maintain multiple copies of files in different locations.



For more information about Office 365, see the sidebar "<u>About Office</u>" in Chapter 1, "Word 2016 basics."

To ensure that you can find a specific document quickly regardless of whether you've worked with it recently, you can pin it to the Recent list. Pinned files appear in the Pinned section at the top of the list and are indicated by a thumbtack.

## **Open documents in Protected view**

When you open a document from an online location (such as a cloud storage location or email message) or from a location that has been deemed unsafe, Word opens the file in Protected view, with most editing functions disabled. The purpose of this is to prevent any malicious code from gaining access to your computer. If you're uncertain about the origin of a file that you're opening, you can choose to open the file in Protected view.

In Protected view, the title bar displays *Read-Only* in brackets to the right of the file name, and a yellow banner at the top of the content pane provides information about why the file has been opened in Protected view. If you know that the document is from a safe location or sender, and you want to edit the file content, you can choose to enable editing. If you don't intend to modify the file content, you can hide the banner by clicking the Close button (the X) at its right end.

If you want to open documents from a specific online storage folder without going into Protected view, you can add that folder (and its subfolders, if you want) to your Trusted Locations list. For information about trusted locations and other Trust Center settings, see "Manage add-ins and security options" in Chapter 16, "Customize options and the user interface."

#### To open a recent document

- 1. Start Word.
- 2. On the **Start** screen, in the **Recent** list, click the file name of the file you want to open.

#### Or

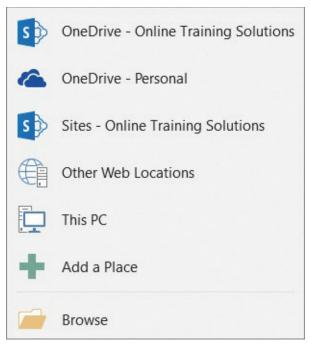
- 1. With Word running, click the **File** tab to display the Backstage view.
- 2. In the left pane of the Backstage view, click **Open** to display the Open page.
- 3. With **Recent** selected at the top of the left pane of the Open page, scroll the file list in the right pane if necessary to locate the document you want to open. Then click the file name to open it.

#### To pin a document to the Recent file list

- 1. Display the **Recent** list on the **Open** page of the Backstage view.
- 2. If necessary, scroll through the list to locate the file you want to pin.
- 3. Point to the file name, and then click the **Pin** button that appears to the right of the file name to add the file to the **Pinned** area at the top of the **Recent** list.

## To open any existing document

- 1. Start Word.
- 2. Do either of the following to display the **Open** page of the Backstage view:
  - On the Start screen, at the bottom of the left pane, click Open Other Documents.
  - With Word running, display the Backstage view, and then click **Open**.
- 3. In the **Places** list, click the local or network storage location where the file is stored.



The Places list includes all the locations you've connected Office to

- 4. Navigate to the file storage folder by using one of the following methods:
  - In the right pane, click a recent folder. Then click any subfolders until you reach the folder you want.
  - In the left pane, click **Browse** to open the Open dialog box. Then click folders in the **Navigation** pane, double-click folders in the file pane, or enter the folder location in the **Address** bar.
- 5. Double-click the document you want to open.



In the Open dialog box, clicking a file name and then clicking the Open arrow displays a list of alternative ways to open the selected document. To look through a document without making any inadvertent changes, you can open the document as read-only, open an independent copy of the document, or open it in Protected view. You can also open the document in a web browser. In the event of a computer crash or other similar incident, you can tell the app to open the document and try to repair any damage.

## To open a file directly from a OneDrive storage site

1. In your browser, navigate to the OneDrive folder.

- 2. Browse to and click the file you want to open.
- 3. If prompted to do so, enter the Microsoft account credentials associated with your OneDrive, and then click **Sign in**.

Or

- 1. In File Explorer, navigate to the OneDrive folder.
- 2. Browse to and double-click the file you want to open.
- 3. If prompted to do so, enter the Microsoft account credentials associated with your OneDrive, and then click **Sign in**.

#### **Edit PDF files in Word**

A useful feature of Word 2016 is the ability to open PDF files and edit them by using all the standard Word proofing tools. When you finish, you can save the file as a document or as a PDF.

To open a PDF file in Word, do either of the following:

- In File Explorer, right-click the file, click Open, and then click **Word (Desktop)**.
- In Word, display the **Open** page of the Backstage view, navigate to the file location, click the file, and then click **Open**. (In the Open dialog box, PDF files now fall into the category of Word Documents.)

Word converts the file to an editable Word document. If the file contains complicated formatting and layout, the Word version of the document might not be a perfect replica of the PDF, but most simple files convert quite cleanly.

#### Move around in documents

If you open a document that is too long or too wide to fit in the content pane, you can bring off-screen content into view without changing the location of the cursor by using the vertical and horizontal scroll bars. The scroll bars appear only when the document is longer or wider than the content pane. The scroll bars and pointer fade from sight when you're not using the mouse, to remove distractions. You can make them reappear by moving the mouse.

You can also move around in a document by moving the cursor. You can place the cursor in a specific location by clicking there, or you can move the cursor different distances and in different directions and by pressing keyboard keys.

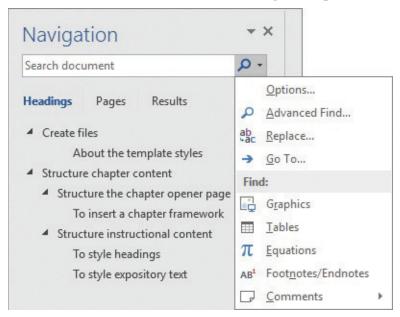
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In a location of the cursor is displayed on the status par. By default, the status bar displays the page the cursor is on, but you can also display the cursor's location by section, line number, and column, and in inches from the top of the page.

# SEE ALSO

For information about displaying information on the status bar, see "Work with the ribbon and status bar" in Chapter 1, "Word 2016 basics."

In a long document, you might want to move quickly among elements of a certain type; for example, from heading to heading, from page to page, or from graphic to graphic. You can do this from the Navigation pane.



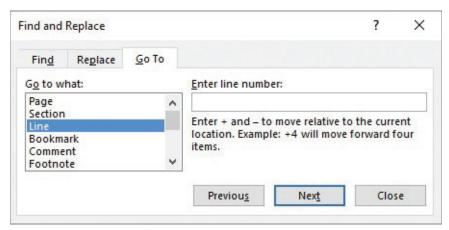
Move to the next object of a specific type



For information about working in the Navigation pane, see "<u>Display</u> <u>different views of documents</u>," later in this chapter.

A greater variety of browsing options is available from the Go To tab of the Find And Replace dialog box. From this tab, you can locate pages, sections, lines, bookmarks, comments, footnotes, endnotes, fields, tables, graphics, equations, objects, or headings. You can jump directly to a specific object if you know its

position within the sequence of that type of object in the document (for example, if it is the fifth equation), move forward or backward a specific number of objects, or browse from one to the next.



Move to a specific object



For information about using the Navigation pane to search for specific content in a document, see "<u>Find and replace text</u>" in <u>Chapter 3</u>, "<u>Enter and edit text</u>."

#### To change the area of a document that is displayed in the content pane

- 1. On the vertical scroll bar, do any of the following:
  - Click the scroll arrows to move up or down by one line.
  - Click above or below the scroll box to move up or down by the height of one screen.
  - Drag the scroll box on the scroll bar to display the part of the document corresponding to the location of the scroll box. For example, dragging the scroll box to the middle of the scroll bar displays the middle of the document.

Or

- 1. On the horizontal scroll bar, do any of the following to move side to side:
  - Click the scroll arrows.
  - Click to the left or right of the scroll box.
  - Drag the scroll box on the scroll bar to display the part of the document corresponding to the location of the scroll box.

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#### To move the cursor by using the keyboard keys

1. Move the cursor by pressing the key or key combination described in the following table.

To move the cursor	Press
Left one character	Left Arrow
Right one character	Right Arrow
Up one line	Up Arrow
Down one line	Down Arrow
Left one word	Ctrl+Left Arrow
Right one word	Ctrl+Right Arrow
Up one paragraph	Ctrl+Up Arrow
Down one paragraph	Ctrl+Down Arrow
To the beginning of the current line	Home
To the end of the current line	End
To the beginning of the document	Ctrl+Home
To the end of the document	Ctrl+End
To the beginning of the previous page	Ctrl+Page Up
To the beginning of the next page	Ctrl+Page Down
Up one screen	Page Up

#### To show or hide the Navigation pane in a document

1. On the **View** tab, in the **Show** group, select the **Navigation Pane** check box.

## To browse by object from the Navigation pane

- 1. Open the **Navigation** pane, and then do any of the following:
  - At the top of the **Navigation** pane, click **Headings**. Then click any heading to move directly to that location in the document.
  - At the top of the **Navigation** pane, click **Pages**. Then click any

thumbnail to move directly to that page of the document.

 At the right end of the search box, click the arrow. In the Find list, click the type of object you want to browse by. Then click the Next and Previous arrows to move among those objects.

#### To display the Go To tab of the Find And Replace dialog box

- 1. Do any of the following:
  - On the **Home** tab, in the **Editing** group, click the **Find** arrow, and then click **Go To**.
  - In the **Navigation** pane, click the **Search** arrow, and then in the **Search for more things** list, click **Go To**.
  - Press Ctrl+G.

#### To browse by object from the Go To What list

- 1. Display the **Go To** tab of the **Find and Replace** dialog box.
- 2. In the **Go to what** list, click the type of object you want to search for.
- 3. Do any of the following:
  - Click the **Next** button to move to the next object of that type.
  - Click the **Previous** button to move to the previous object of that type.
  - In the adjacent box, enter either of the following, and then click the Go
    To button:
    - Enter a number identifying the position of the object within the total objects of that type in the document. (For example, to move to the fourth field in the document, you would enter **4**.)
    - Enter + (plus sign) or (minus sign) and then a number to move forward or backward by that many objects of the selected type.

## **Display different views of documents**

You can display a document in different views that provide different types of information and make it easier to interact with specific document elements. If you want to take a closer look at the document content, you can increase the magnification of the content pane. If you want a high-level view of the content—for example, to quickly review all the pages of a document for length—you can decrease the magnification and view multiple pages at the same time.

Word 2016 has five views in which you can create, organize, and preview documents. Each view is suited to a specific purpose. The views are:

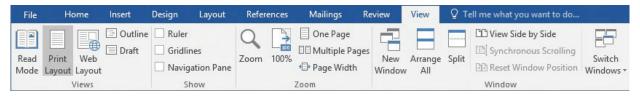
- **Print Layout view** This view displays a document on the screen the way it will look when printed. You can review elements such as margins, page breaks, headers and footers, and watermarks. This is the default view and the view you'll use most frequently (or perhaps the only view you'll use) when developing content.
- **Read Mode view** This view displays as much document content as will fit on the screen at a size that is comfortable for reading. In this view, the ribbon is replaced by one toolbar at the top of the screen with buttons for searching and navigating in the document. You can display comments, but you can't edit the document in this view.
- **Web Layout view** This view displays the document the way it will look when viewed in a web browser, so that you can review the way that text wraps to fit the window and the positioning of graphics. Web Layout view also displays page backgrounds and effects.
- **Outline view** This view displays the structure of a document as nested levels of headings and body text, and provides tools for viewing and changing the hierarchy.

# SEE ALSO

For information about displaying and modifying a document in Outline view, see "Reorganize document outlines" in Chapter 10, "Organize and arrange content."

■ **Draft view** This view displays the content of a document with a simplified layout so that you can quickly enter and edit text. Draft view doesn't display images or layout elements such as headers and footers.

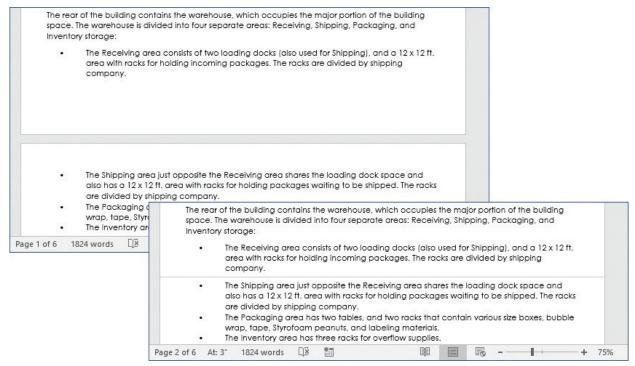
You manage the display of views and of window elements from the View tab of the ribbon. Three of the views are also available from the View Shortcuts toolbar near the right end of the status bar.



The active view is shaded

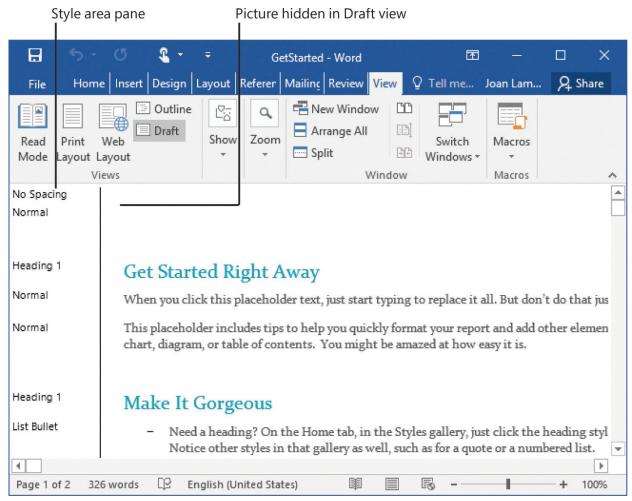
When you are developing a document in Print Layout view, the primary content pane displays the content of the document that you're working in. Each page is

represented at the size specified in the document layout settings, with margins and other white space represented as they will appear when the document is printed. As you scroll a multipage document, spaces appear between the pages. If you want to fit more content on the screen, you can hide the white space on and between pages.



The junction of two pages with and without white space

When working in Outline or Draft view, you can display the paragraph style of each paragraph in the left margin, in an area called the style area pane. (It's not a pane, though, it's just a marginal area of the page.) By default, the style area pane width is set to zero inches wide, so it is effectively closed. If you want to display it, you can increase the width.



The style area pane is available only in Draft view and Outline view

If your document uses styles to control the appearance and hierarchy of the content, you can display the headings in the Navigation pane and styles in the Style pane so that you can more quickly access and work with styles and styled content. You can also use the Navigation pane to display and move among page thumbnails or search results, as described in the previous topic.

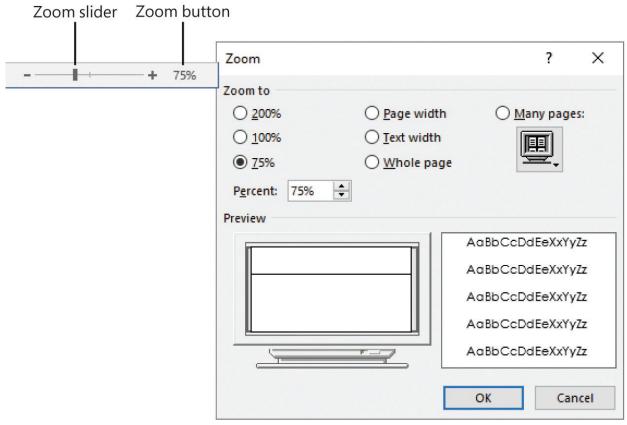
Word has many other task-specific panes in which you can, for example, display Clipboard content, research terminology, review spelling, and format graphics. These panes usually appear to the right or left of the content pane and span the full height of the content pane. Some of them can float within or outside of the Word window or be docked to other sides of the window. I discuss these panes in the context of their functionality in other chapters. Regardless of the purpose of the pane, however, you use the same methods to resize or move it.

You can change the space available for document content and app window elements by resizing the window, adjusting the relative sizes of the panes, or collapsing or hiding the ribbon. A new feature introduced with Word 2016 permits you to entirely hide not only the ribbon content, but also the ribbon tabs and the app window title bar.



For information about hiding, collapsing, and displaying the ribbon, see "Work with the ribbon and status bar" in Chapter 1, "Word 2016 basics."

When you want to focus on the layout of a document, you can display rulers and gridlines to help you position and align elements. You can also adjust the magnification of the content area by using the tools available in the Zoom group on the View tab and at the right end of the status bar.



Clicking the Zoom button opens the Zoom dialog box



For information about controlling paragraph formatting from the ruler, see "Apply paragraph formatting" in Chapter 4, "Modify the

If you want to work with different parts of a document, you can open the same instance of the document in a second window and display both, or you can split a window into two panes and scroll through each pane independently.

You're not limited to working with one document at a time. You can easily switch among multiple open documents. If you want to compare or work with the content of multiple documents, you can simplify the process by displaying the documents next to each other.

A feature that can be invaluable when you are fine-tuning the layout of a document in Word is the display of nonprinting characters (such as tabs, paragraph marks, and section breaks) that control the layout of your document. You can control the display of these characters for each window.

#### To switch among views of a document

- 1. Do either of the following:
  - On the **View** tab, in the **Views** group, click the view you want.
  - On the **View Shortcuts** toolbar, click the view button you want.

#### To hide or display white space in Print Layout view

- 1. Point to the space between two pages.
- 2. When the pointer changes to display a representation of that space, double-click.

## To show or hide the Navigation pane

1. On the **View** tab, in the **Show** group, select the **Navigation Pane** check box.

## To adjust the size of the Navigation pane

1. Point to the right border of the **Navigation** pane. When the pointer changes to a double-headed arrow, drag to the right or left.



The Navigation pane is available in all views other than Read Mode. When you adjust the width of the Navigation pane, the pane content changes accordingly. For example, the Navigation pane displays more page thumbnails in a narrow pane and fewer page thumbnails in a wide pane.

#### To display the style area pane in Draft view or Outline view

- 1. In the Backstage view, click the **Options** page tab to open the Word Options dialog box.
- 2. In the **Word Options** dialog box, click the **Advanced** page tab.
- 3. On the **Advanced** page, scroll to the **Display** area (about halfway down the page) and change the **Style area pane width in Draft and Outline views** setting to any number greater than 0. Then click **OK**.

## To resize the style area pane in Draft view or Outline view

- 1. Point to the right border of the style area pane.
- 2. When the pointer changes to a double-headed arrow, drag the border to the left or right.

#### To change the magnification of document content

- 1. Do either of the following to open the **Zoom** dialog box:
  - On the **View** tab, in the **Zoom** group, click the **Zoom** button.
  - At the right end of the status bar, click the **Zoom** button.
- 2. In the **Zoom** dialog box, select a **Zoom to** option or enter a specific percentage in the **Percent** box, and then click **OK**.

Or

- 1. In the zoom controls at the right end of the status bar, do any of the following:
  - Drag the slider to the left to decrease the magnification or to the right to increase the magnification.
  - At the left end of the slider, click the **Zoom Out** button to decrease the magnification in 10-percent increments.
  - At the right end of the slider, click the **Zoom In** button to increase the magnification in 10-percent increments.

## To display or hide rulers or gridlines in a document

- 1. On the **View** tab, in the **Show** group, do either of the following:
  - Select or clear the **Ruler** check box.
  - Select or clear the **Gridlines** check box.



For information about controlling document gridlines, see "<u>Arrange</u> <u>objects on a page</u>" in <u>Chapter 10</u>, "<u>Organize and arrange content</u>."

# To display or hide nonprinting characters and formatting marks in a document

- 1. Do either of the following:
  - On the **Home** tab, in the **Paragraph** group, click the **Show/Hide** ¶ button.
  - Press Ctrl+\*.



You need to hold down the Shift key to activate the \* key. So, in effect, you are pressing Ctrl+Shift+8.

#### To split a window into two panes

1. On the **View** tab, in the **Window** group, click the **Split** button.

#### To display a different open document

- 1. Do either of the following:
  - On the **View** tab, in the **Window** group, click the **Switch Windows** button, and then click the file you want to view.
  - Point to the **Word** button on the Windows taskbar, and then click the thumbnail of the document you want to display.

## To display multiple open documents at the same time

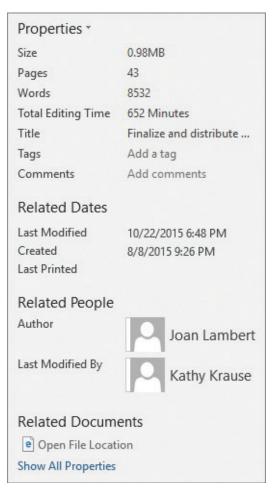
1. On the **View** tab, in the **Window** group, click the **Arrange All** button.

## Display and edit file properties

Properties are file attributes or settings, such as the file name, size, created date, author, and read-only status. Some properties exist to provide information to computer operating systems and apps. You can display properties within the content of a document (for example, you can display the page number on the document pages). Word automatically tracks some of the file properties for you, and you can set others.

You can examine the properties that are attached to a file from the Info page of

the Backstage view.



Some of the properties stored with a typical Word document

You can change or remove basic properties in the default Properties pane or expand the Properties pane to make more available, or you can display the Properties dialog box to access even more properties.

#### To display file properties

- 1. Display the **Info** page of the Backstage view. The Properties area in the right pane displays the standard properties associated with the document.
- 2. At the bottom of the **Properties** pane, click **Show All Properties** to expand the pane.
- 3. At the top of the **Properties** pane, click **Properties**, and then click **Advanced Properties** to display the Properties dialog box.

#### To edit file properties

1. In the **Properties** pane, click the value for the property you want to edit to

activate the content box.

2. Enter or replace the property value, and then press **Enter**.

Or

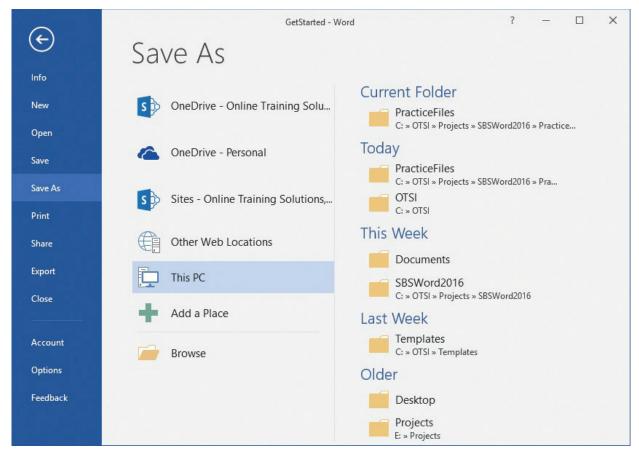
- 1. In the **Properties** dialog box, do either of the following:
  - On the **Summary** page, click the box to the right of the property you want to modify, and then enter or replace the property value.
  - On the Custom page, select the property you want to modify in the Name list, and then enter or replace the property value in the Value box.

#### Save and close documents

When you save a document in Word, it is saved in the default .docx file format, but you can also choose a different format from many other choices. For example, if you plan to distribute the document electronically to people who use a different word-processing program, you can choose a compatible format, or if you want to protect the document content, you can save it as a PDF file.

## **Manually save documents**

You save a document the first time by clicking the Save button on the Quick Access Toolbar or by displaying the Backstage view and then clicking Save As. Both actions open the Save As page, where you can select a storage location.



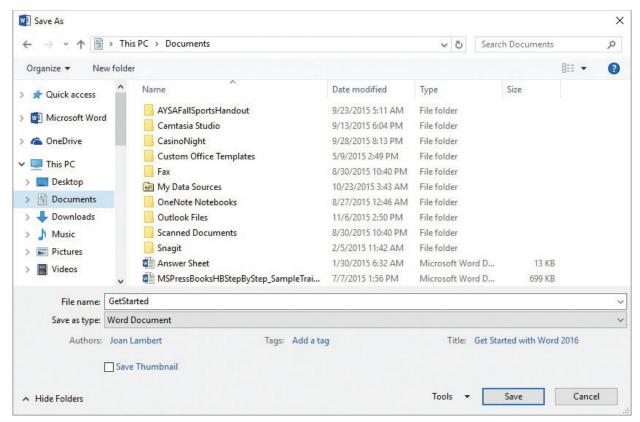
Save your document in an online location to access it from anywhere

You can save the document in a folder on your computer or, if you have an Internet connection, in a folder on your OneDrive. If your company is running SharePoint, you can add a SharePoint site so that it is available from the Places pane of the Save As page, just like any other folder.



For information about OneDrive, see the sidebar "Save files to OneDrive" later in this chapter.

Clicking Browse at the bottom of the left pane displays the Save As dialog box, in which you assign a name to the document.



The dialog box shows other files of the same type that are saved in the current folder



If you want to create a new folder in which to store the document, click the New Folder button on the dialog box's toolbar.

After you save a document for the first time, you can save changes simply by clicking the Save button on the Quick Access Toolbar. The new version of the document then overwrites the previous version.

#### To save a document for the first time

- 1. Click the **File** tab to display the Backstage view.
- 2. In the left pane of the Backstage view, click **Save As**.
- 3. On the **Save As** page of the Backstage view, click a storage location, and then click a recently accessed folder in the right pane, or click **Browse**.
- 4. In the **Save As** dialog box, browse to the folder you want to save the document in.

- 5. In the **File name** box, enter a name for the document.
- 6. If you want to save a document in a format other than the one shown in the Save As Type box, click the **Save as type** arrow and then, in the **Save as type** list, click the file format you want.
- 7. In the **Save As** dialog box, click **Save**.

#### To add a cloud storage location

- 1. On the **Save As** page of the Backstage view, click **Add a Place**.
- 2. In the **Add a Place** list, click **Office 365 SharePoint** or **OneDrive**.
- 3. In the **Add a service** dialog box, enter the email address you use to sign in to the cloud storage service, and then click **Next**.
- 4. In the **Sign in** dialog box, enter the password associated with the account, and then click **Sign In** to add the cloud storage location associated with that account to the Places list.

#### To save a copy of a document

- 1. Display the **Save As** page of the Backstage view.
- 2. Save the document with a different name in the same location or with any name in a different location. (You can't store two documents with the same name in the same folder.)

#### To save a document without changing its name or location

- 1. Do any of the following:
  - On the Quick Access Toolbar, click the **Save** button.
  - In the left pane of the Backstage view, click **Save**.
  - Press Ctrl+S.

#### Save files to OneDrive

When you save a document to OneDrive, you and other people with whom you share the document can work on it by using a local installation of Word or by using Word Online, which is available in the OneDrive environments.

If you're new to the world of OneDrive, here's a quick tutorial to help you get started.

OneDrive is a cloud-based storage solution. The purpose of OneDrive is to provide a single place for you to store and access all your files. Although this might seem like a simple concept, it

provides major value for people who use Word or other Office products on multiple devices, including Windows computers, Mac computers, iPads and other tablets, and Windows, iPhone, and Android smartphones.

For example, you can create a document on your desktop computer at work, edit it on your laptop at home, and review it on your smartphone while you're waiting for your lunch to be served at a restaurant. If you use the full suite of Office products within your organization, you can even present the document in a Skype for Business meeting from your tablet PC, all while the document is stored in the same central location.

There are currently two types of OneDrive—one for personal use and one for business use:

- **OneDrive** A *personal* OneDrive storage site is provided free with every Microsoft account. Each OneDrive is linked to a specific account.
- **OneDrive for Business** An *organizational* OneDrive storage site is provided with every business-level Office 365 subscription license. These storage locations are part of an organization's Office 365 online infrastructure.

You might have both types of OneDrive available to you; if you do, you can connect to both from within Word (or any Office app).

In this book, the personal and organizational versions are referred to generically as *OneDrive* sites.

To make OneDrive a realistic one-stop storage solution, Microsoft has chosen to support the storage of very large files (up to 10 gigabytes [GB] each) and to provide a significant amount of free storage—from a minimum of 15 GB for every Microsoft account, to unlimited storage for Office 365 subscribers!

By default, documents that you store on your OneDrive site are password-protected and available only to you. You can share specific files or folders with other people by sending a personalized invitation or a generic link that allows recipients to view or edit files. You can access documents stored on your OneDrive in several ways:

- From within Word when opening or saving a file.
- Through File Explorer, when you synchronize your OneDrive site contents with the computer.
- Through a web browser. Personal OneDrive sites are available at <a href="https://onedrive.live.com">https://onedrive.live.com</a>; organizational OneDrive sites have addresses linked to your Office 365 account, such as <a href="https://contoso-my.sharepoint.com/personal/joan\_contoso\_com/">https://contoso-my.sharepoint.com/personal/joan\_contoso\_com/</a>.

Because OneDrive and OneDrive for Business file storage locations are easy to add to any version of Word 2016, OneDrive is a simple and useful cloud storage option. And best of all, it's completely free!

## **Automatically save documents**

By default, Word automatically saves the document you're working on and tracks saved versions so that you can gracefully recover documents without losing data, or you can revert to an earlier version.

When the AutoSave function is turned on:

- If you're working in a new, unnamed file, the app saves a temporary copy of the file to your default storage location.
- If you're working in a previously saved file, the app saves a copy of the file to the location in which you opened or last saved it.

You can turn off the automatic file-saving function if you prefer to save changes manually (but I'd advise against it), and you can change the time interval between saves.

## To adjust the time interval between saves

- 1. Display the Backstage view, and then click **Options** to open the Word Options dialog box.
- 2. In the left pane, click **Save**.
- 3. On the **Save** page, in the **Save AutoRecover information every** box, specify the frequency (in minutes) at which you'd like Word to save the document.



For information about working with document versions, see "Compare and merge documents" in Chapter 11, "Collaborate on

<u>documents</u>." For information about configuring other Word options, see "<u>Change default Word options</u>" in <u>Chapter 16</u>, "<u>Customize</u> options and the user interface."

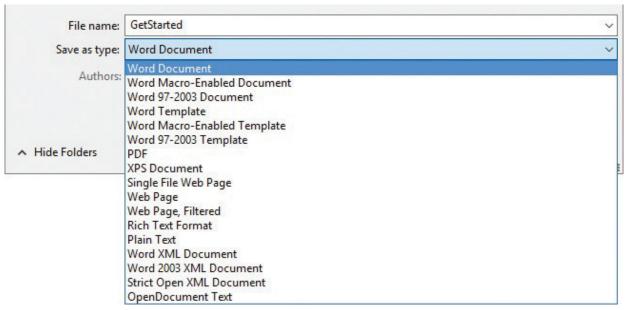
#### Save documents in other formats

Word 2016 uses file formats based on a programming language called *Extensible Markup Language*, or more commonly, *XML*. These file formats, called the *Microsoft Office Open XML Formats*, were introduced with Microsoft Office 2007.

Word 2016 offers a selection of file formats intended to provide specific benefits. Each file format has a file name extension that identifies the file type to the system. The file formats and file name extensions for Word 2016 files include the following:

- Word Document (.docx)
- Word Macro-Enabled Document (.docm)
- Word Template (.dotx)
- Word Macro-Enabled Template (.dotm)
- Word XML Document (.xml)

Other file types that are not specific to Word, such as text files, webpages, PDF files, and XPS files, are available from the Save As dialog box.



You can save a document in any of these file formats

The default file format for files created in Word 2016 is the .docx format, which

provides the following benefits over the .doc file format that was the previous standard:

- **Decreased file size** Files are compressed when saved, decreasing the amount of disk space and bandwidth needed to store and transmit files.
- **Simpler retrieval and editing of content** XML files can be opened in text-editing apps such as Notepad.
- **Increased security** Personal data can be located and removed from the document, and files can't store macros. (The .docm file format is designed for documents that contain macros.)

If you want to save a Word document in a format that can be opened by the widest variety of programs (including text editors that are installed with most operating systems), use one of these two formats:

- **Rich Text Format (\*.rtf)** This format preserves the document's formatting.
- **Plain Text (\*.txt)** This format preserves only the document's text.

If you want people to be able to view a document exactly as it appears on your screen, use one of these two formats:

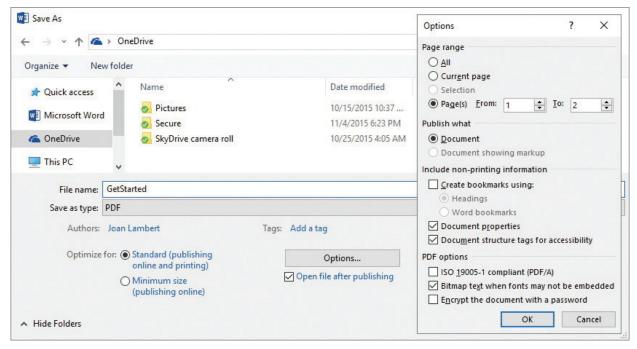
- **PDF** (.pdf) This format is preferred by commercial printing facilities. Recipients can display the file in the free Microsoft Reader or Adobe Reader apps, and can display and edit the file in Word 2016 or Adobe Acrobat.
- **XPS** (.xps) This format precisely renders all fonts, images, and colors. Recipients can display the file in Microsoft Reader or the free XPS Viewer app.



Another way to create a PDF file or XPS file is by selecting that option when sending the document by email. For more information, see "<u>Print and send documents</u>" in <u>Chapter 12</u>, "<u>Finalize and distribute documents</u>."

The PDF and XPS formats are designed to deliver documents as electronic representations of the way they appear when printed. Both types of files can easily be sent by email to many recipients and can be made available on a webpage for downloading by anyone who wants them. However, the files are no

longer Word documents. A PDF file can be converted to the editable Word format. An XPS file cannot be opened, viewed, or edited in Word.



You can create a PDF file from all or part of a document

When you save a Word document in PDF or XPS format, you can optimize the file size of the document for your intended distribution method—the larger Standard file size is better for printing, whereas the Minimum file size is suitable for online publishing.

## Maintain compatibility with earlier versions of Word

Word 2003 and earlier versions of Word used the .doc file format. You can open .doc files in Word 2016, but some Word 2016 features will be unavailable.

When you open a file created in Word 2010 or an earlier version of Word, the title bar displays [Compatibility Mode] to the right of the document name. You can work in Compatibility mode, or you can convert the document to Word 2016 format by clicking the Convert button on the Info page of the Backstage view, or by saving a copy of the document with Word Document as the file type.

If you work with people who are using a version of Word earlier than Word 2007, you can save your documents in a format that they will be able to use by choosing the *Word 97-2003* file format in the Save As Type list, or they can install the free Microsoft Office

Compatibility Pack for Word, Excel, and PowerPoint File Formats from the Microsoft Download Center (located at *download.microsoft.com*). The Compatibility Pack doesn't provide additional functionality in the older versions of the apps, but it does enable users to open current documents, workbooks, and presentations.

#### To save part or all of a document in PDF format

- 1. Open the **Save As** dialog box. In the **File type** list, click **PDF**. The dialog box content changes to provide additional options.
- 2. If you want to create a PDF file that has a smaller file size (but lower quality), click **Minimum size** (publishing online).
- 3. To modify any of the default settings, click the **Options** button, do any of the following, and then click **OK**:
  - Specify the pages to include in the file.
  - Include or exclude comments and tracked changes.
  - Include or exclude nonprinting elements such as bookmarks and properties.
  - Select compliance, font embedding, and encryption options.
- 4. If you don't want to automatically open the new PDF file in your default PDF viewer, clear the **Open file after publishing** check box.
- 5. In the **Save As** dialog box, click **Save**.

#### **Close documents**

Every time you open a document, a new instance of Word starts. When you close the file, you can exit that instance of Word. If you have only one document open, you can close the file and exit Word, or you can close the file but leave Word running.

#### To close a document

- 1. Do any of the following:
  - At the right end of the title bar, click the **Close** button to close the document and the Word window.
  - Display the Backstage view, and then click **Close** to close the document without exiting Word.
  - On the Windows taskbar, point to the Word button to display thumbnails

of all open documents. Point to the thumbnail of the document you want to close, and then click the **Close** button that appears in its upper-right corner.

#### Skills review

In this chapter, you learned how to:

- Create documents
- Open and move around in documents
- <u>Display different views of documents</u>
- <u>Display and edit file properties</u>
- Save and close documents



The practice files for these tasks are located in the Word2016SBS\Ch02 folder. You can save the results of the tasks in the same folder.

#### **Create documents**

Perform the following tasks:

- 1. Start Word and create a new, blank document.
- 2. Display the available templates for new documents. Scroll through the list of featured templates and note the types of documents you can create from them.
- Search for a template that is related to something you're interested in. (For example, you could use a search term such as **food**, **school**, **children**, or **customers**.)
- 4. Review the categories in the right pane of the search results. Filter the results by two categories and notice the effect. Then remove one of the category filters. Preview a template from the search results. If the template preview includes multiple images, preview each of those by clicking the arrows below the image.
- 5. Without closing the preview window, preview the next or previous template by clicking the arrows to the sides of the preview window.
- 6. From the preview window, create a document based on the currently

- displayed template. Notice that the unsaved blank document remains open.
- 7. Close the blank document without saving it. Leave the template-based document open for use in a later set of practice tasks.

## Open and move around in documents

In Word, perform the following tasks:

- 1. Display the **Open** page of the **Backstage** view.
- 2. If there are files in the **Recent** list, notice the groups they're divided into, their file storage locations, and whether any are pinned to the list.
- 3. From the **Open** page, browse to the practice files folder, and open the **NavigateFiles** document.
- 4. In the second line of the document title, click at the right end of the paragraph to position the cursor.
- 5. Use a keyboard method to move the cursor to the beginning of the line.
- 6. Use a keyboard method to move the cursor to the beginning of the word *Regulations*.
- 7. Use a keyboard method to move the cursor to the end of the document.
- 8. Use the scroll bar to move to the middle of the document.
- 9. Use the scrollbar to change the view of the document by one screen.
- 10. Open the **Navigation** pane.
- 11. In the **Navigation** pane, click the *Landscaping* heading to move the cursor directly to the selected heading.
- 12. At the top of the **Navigation** pane, click **Pages**. On the **Pages** page, scroll through the thumbnails to review the amount of visible detail, and then click the thumbnail for page **5** to move the cursor directly to the top of the selected page.
- 13. At the right end of the **Navigation** pane title bar, click the **Close** button (the X) to close the pane.
- 14. On the **Open** page of the Backstage view, pin the **NavigateFiles** document to the **Recent** list.
- 15. Close the document without saving it.

## **Display different views of documents**

Open the DisplayViews document in Word, and then perform the following

#### tasks:

- 1. If the document is not already in Print Layout view, display it in that view.
- 2. Switch to Web Layout view and scroll through the document to the end. Notice that the lines break differently and that there are no longer any page breaks.
- 3. Move the cursor back to the beginning of the document, and switch to Read Mode view.
- 4. On the Read Mode toolbar, click **Tools** to review the commands on the menu, and then click **View** to review the commands on that menu. Then, on the **View** menu, click **Edit Document** to return to Print Layout view.
- 5. In Print Layout view, hide the white space between pages. Scroll through the document and notice the change in the page lengths when the white space is hidden.
- 6. Open the **Navigation** pane and display the document headings. Adjust the pane width to the minimum necessary to display the headings.
- 7. Close the **Navigation** pane.
- 8. In the **Word Options** dialog box, set the width of the style area pane to **2**". Then click **OK** to return to the document.
- 9. Display the document in Draft view. Notice that the style area is visible along the left side of the document, but it is wider than necessary.
- 10. Drag the style area pane's right border to the left until it takes up about half the original amount of space.
- 11. Display the document in Print Layout view, and use any method described in this chapter to change the magnification to **75%**.
- 12. Split the window into two panes, position the cursor in the top pane, and then change the magnification to **100%**. Notice that only the active pane changes. Then remove the split.
- 13. Use commands on the **View** tab to arrange the **DisplayViews** document and the document you created in the first set of practice tasks side by side on the screen.
- 14. In the **DisplayViews** document, display the gridlines. Notice that they appear in both open documents.
- 15. Switch to the document you created in the first set of practice tasks. Display the rulers. Notice the effect of this action in the other open document.

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16. Save and close both documents.

## Display and edit file properties

Open the EditProperties document in Word, and then perform the following tasks:

- 1. On the **Info** page of the Backstage view, do the following:
  - Review the information in the **Properties** list. Notice the types of information that have been saved with the document.
  - Point to each of the property values, and notice the values that you can edit.
  - Set the **Title** property to **Welcome to Word**.
- 2. Expand the **Properties** list to display all properties, and then do the following:
  - Notice the additional properties that were not previously visible. (If necessary, click **Show Fewer Properties** to switch back to the original list for comparison purposes.)
  - Point to the Manager and Author property values, and notice that Check Names and Address Books buttons appear. Experiment with adding a Manager property from your address book.
- 3. Click the **Properties** header, and then display the advanced properties. In the **EditProperties Properties** dialog box, do the following:
  - Compare the properties on the **Summary** tab with those in the **Properties** list. Notice the properties that you added in steps 1 and 2.
  - In the **Author** box, enter your name.
  - In the **Keywords** box, enter **Word 2016 new features**.
  - Review the information on the **General**, **Statistics**, **Contents**, and **Custom** tabs. Notice the information that is available only in the Properties dialog box.
  - · Click OK.
- 4. Verify that the information you entered in the **Properties** dialog box appears in the **Properties** list. If it doesn't, save, close, and reopen the document to update the properties.

#### Save and close documents

In Word, perform the following tasks:

- 1. Save a copy of the EditProperties document in the practice file folder as **MyDocument**. Close the document and this instance of Word.
- 2. Close the document you created in the first task without exiting Word.
- 3. Close the remaining open documents, and exit Word.