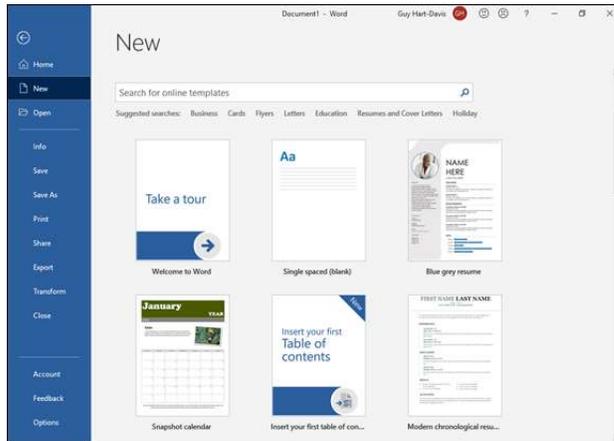


Chapter 2: Creating and Saving Documents

In this chapter, you learn how to create new documents and save them either to your computer or to OneDrive. You also explore how to work with different document formats, switch between open documents, and recover unsaved documents.

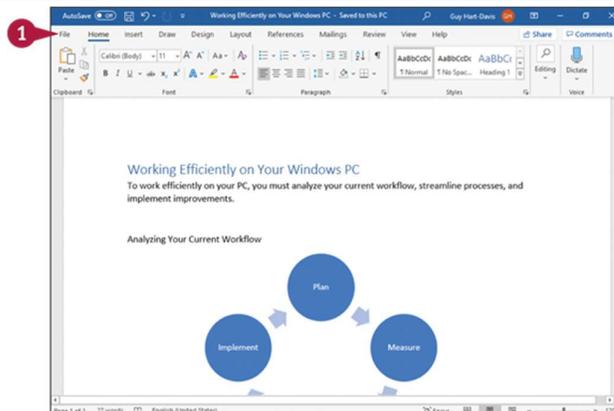


Start a New Document

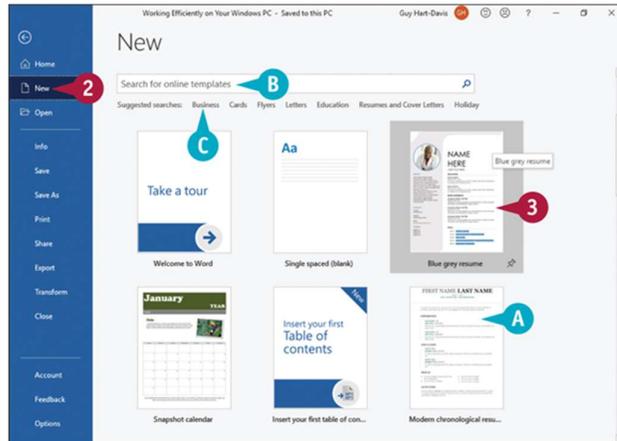
Each time you open Word, the Word Start screen offers you a variety of choices, including several ways to begin a new document. But you can also start a new document while you are already working in Word.

You can use a *template*—a document containing predefined settings that saves you the effort of creating the settings yourself—as the foundation for a document. Word’s Start screen and the New pane in Backstage View offer a variety of templates.

Start a New Document



1 With a document already open in Word, click **File**.



Backstage View appears.

2 Click **New**.

The New pane appears.

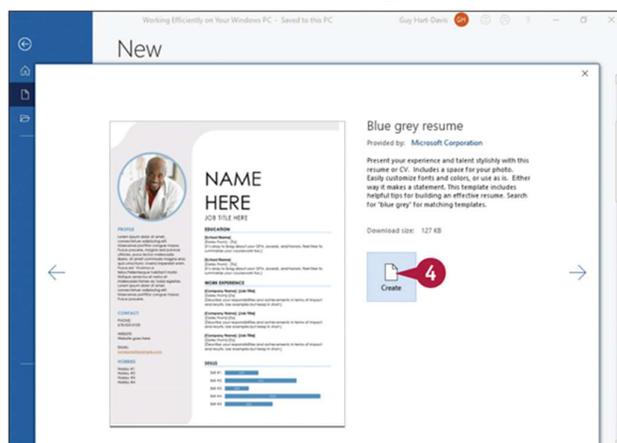
A Templates appear in the main part of the New pane.

B You can search for templates online at templates.office.com/en-US.

C You can click a button in the Suggested Searches list to search for templates in a particular category.

3 Click a template.

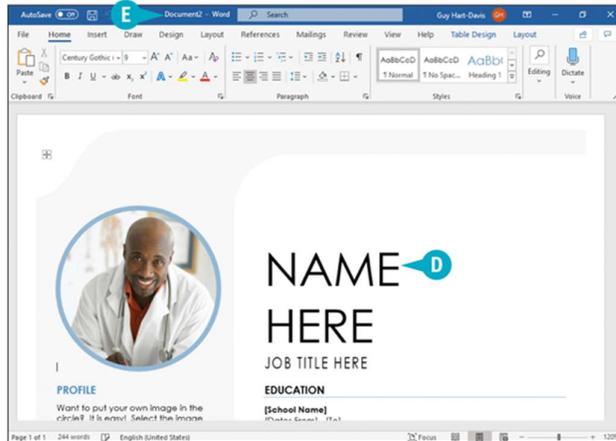
Note: This example uses **Blue grey resume**.



A preview of the template appears.

4 Click **Create**.

Note: If you change your mind about the template you chose in step 3, click **x** in the upper-right corner of the preview. Word redisplay Backstage View, showing the choices when you click New.



- D** The new document based on the template you chose appears. You can edit this document any way you choose.
- E** Word gives the new document a generic name, such as Document2. When you save the document, as explained in the next section, you give the document a permanent name.

TIP

When I save the document, am I overwriting the settings in the template?

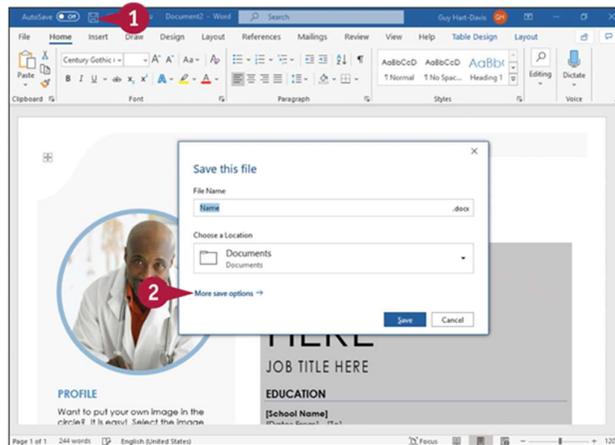
No. The document contains the settings found in the template, but saving the document has no effect on the template. The next time you choose to use that template, it will contain its original information. Think of it this way: a blank document is based on the Normal template, which contains no text, but it contains other settings such as fonts, font sizes, line spacing settings, and margins.

Save a Document to Your Computer

You save documents so that you can use them at another time in Microsoft Word. Word can save documents in various formats, but you will normally want to use the default format, which is called “Word Document (*.docx).” See the first tip in this section for brief details of the advantages of the Word Document format.

The first time you save a document, Word prompts you to specify a name for the document. Once the document has a name, you can click the Save button on the Quick Access Toolbar or press the **Ctrl** + **S** shortcut to save changes quickly.

Save a Document to Your Computer



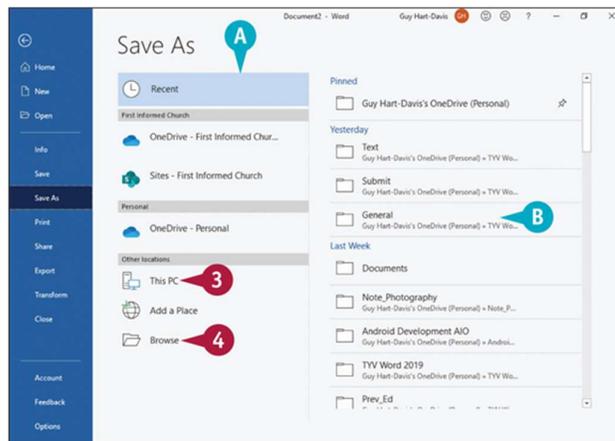
Note: To avoid losing work, save each document immediately after you create it. After that, save the document whenever you have made changes that you would not want to have to make again.

1 Click **Save** (💾).

The Save This File dialog box opens.

Note: The Save This File dialog box lets you save documents in only a few locations. Displaying the Save options pane in Backstage View gives you access to all your locations.

2 Click **More save options**.



The Save As pane in Backstage View appears.

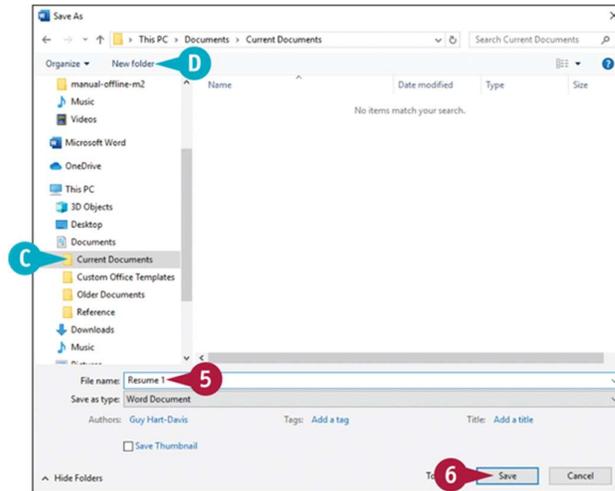
A Locations where you can save files appear here.

Note: Once you select a location, folders available at that location appear on the right side of the screen.

3 Click the location where you want to save the file; this example uses **This PC**.

B If the folder in which you want to save the document appears here, click it and skip to step 5.

4 Click **Browse**.



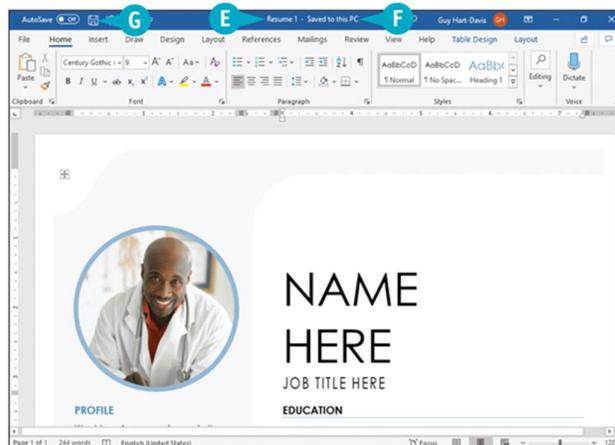
The Save As dialog box opens.

5 Type a name for the document here.

C You can click in the folder list to select a location on your computer in which to save the document.

D You can click **New folder** to create a new folder in which to store the document.

6 Click **Save**.



Word saves the document.

E The title bar shows the document's name.

F The title bar shows *Saved to this PC* to let you know the document is saved to your computer rather than to the Cloud.

6 After making changes you want to keep, click **Save** (📁) to save the changes.

Note: You can also press **Ctrl + S** to save the document.

TIPS

What are the advantages of the Word Document (*.docx) format?

The Word Document format has two main advantages. First, it reduces the amount of space needed to store a document. Second, it makes the document more resistant to corruption and improves your chances of recovering your work if a problem occurs, such as Word or your computer crashing. This format uses XML—the Extensible Markup Language—to provide structure and integrity for the file’s contents.

How can I verify that the active document uses the Word .docx format?

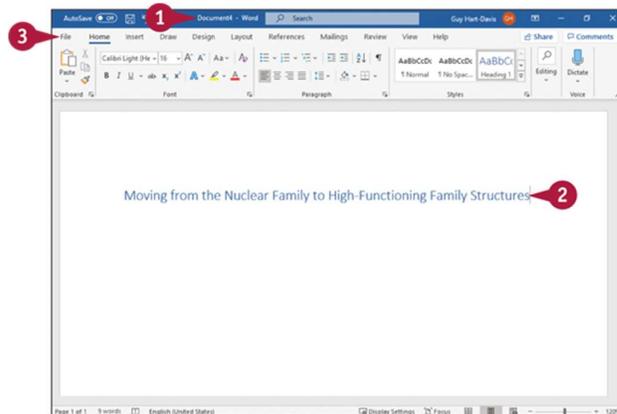
Look at the document name in the title bar. The title of a document saved in a different format appears with “Compatibility Mode” in the title bar.

Save a Document to the Cloud

If you get Word through an Office 365 subscription, Microsoft gives you online storage space on its OneDrive cloud service. For example, an Office 365 Home subscription provides up to 1 TB—one terabyte, which is 1000 gigabytes—of space for each of up to six users.

OneDrive stores files in a folder on your PC and syncs that folder automatically to the OneDrive cloud. So each time you save a document in Word, the changes are saved first to your PC and then synced to the cloud.

Save a Document to the Cloud

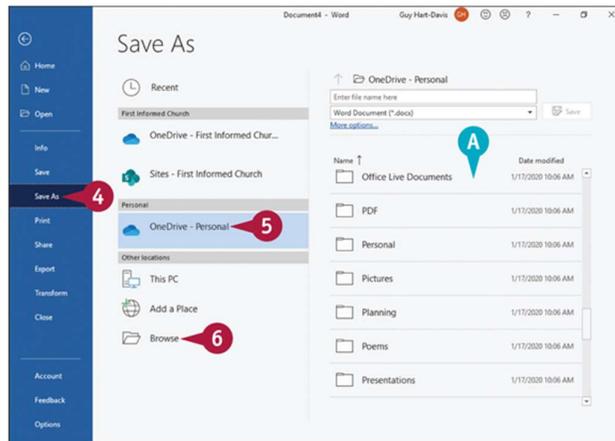


1 Create a new document, as discussed in the section “[Start a New Document](#),” earlier in this chapter. For example, click **File**, and then click **New** to open the New pane in Backstage View; then click **Blank document** or a template of your choice.

Note: Alternatively, open an existing document that you want to save to the Cloud.

2 Enter any initial text needed, such as the document’s title.

3 Click **File**.



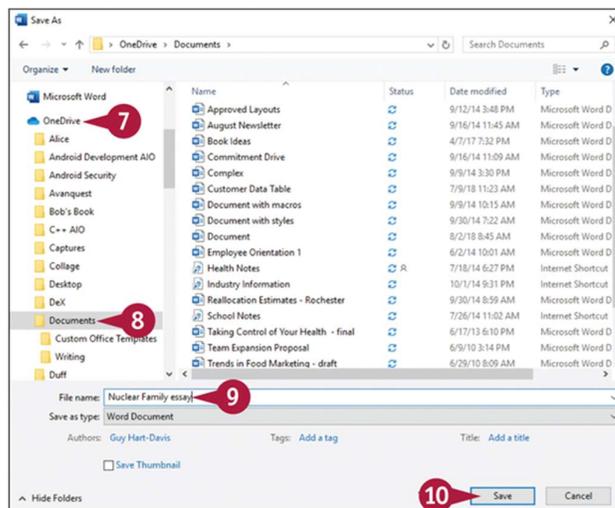
Backstage View appears.

4 Click **Save As**.

5 Click your OneDrive.

A The list of folders appears.

6 If the folder where you want to save the document appears in these lists, click that folder; otherwise, click **Browse**.



The Save As dialog box opens.

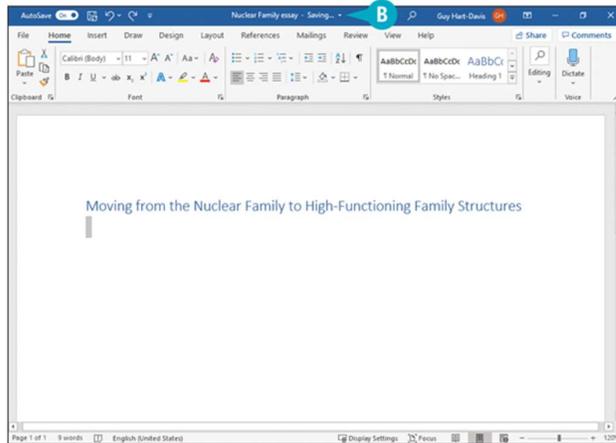
7 Click your OneDrive in the folder list.

8 Open the OneDrive folder where you want to place the document.

9 Type a filename.

Note: If you opened the document from your OneDrive space, you will be prompted to replace it; click **Yes**.

10 Click **Save**.



B Word saves the document and uploads it to OneDrive.

TIP

How do I prevent Word from automatically synchronizing with my OneDrive?

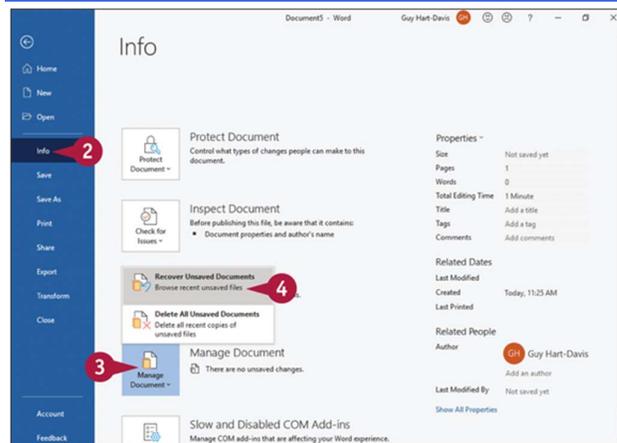
Perform the steps that follow: Click **File**, and then click **Options** to display the Word Options dialog box. Click **Save** in the left pane. Select **Save to Computer by default** (changes to) , and then click **OK**.

Recover an Unsaved Document

You can open documents you created within the last seven days but did not save. Normally, it is best to save every document you create, but you may sometimes create a document, work in it, and then close it without saving because you think you will not need it again. And then, a few hours or days later, you find that you do need it.

You can reopen a document you created within the last seven days but did not save because Word automatically saves your documents in case problems occur.

Recover an Unsaved Document



1 With any document open, even a blank document, click **File**.

Note: See the section “[Start a New Document](#)” or “[Open a Word Document](#)” for details.
Backstage View appears.

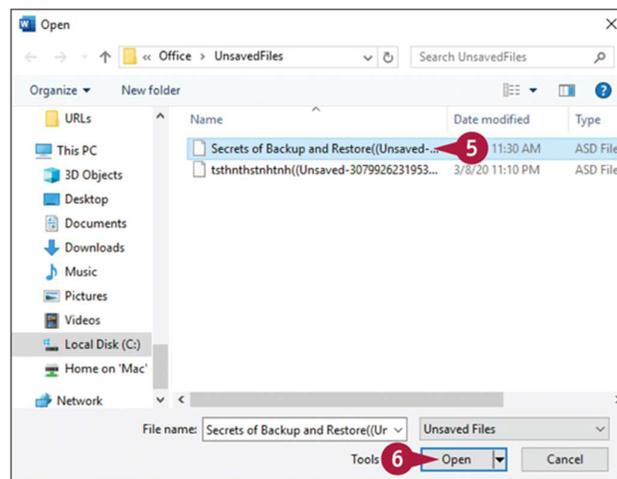
2 Click **Info**.

The Info pane appears.

3 Click **Manage Document**.

The Manage Document pop-up menu opens.

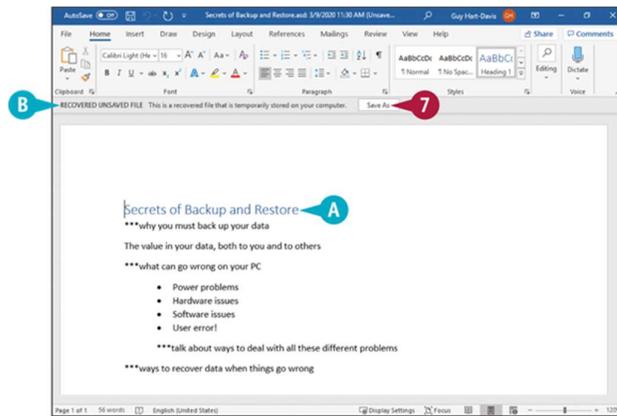
4 Click **Recover Unsaved Documents**.



The Open dialog box appears, showing you available files that Word saved automatically but that you did not save as documents.

5 Click the unsaved file you want to open.

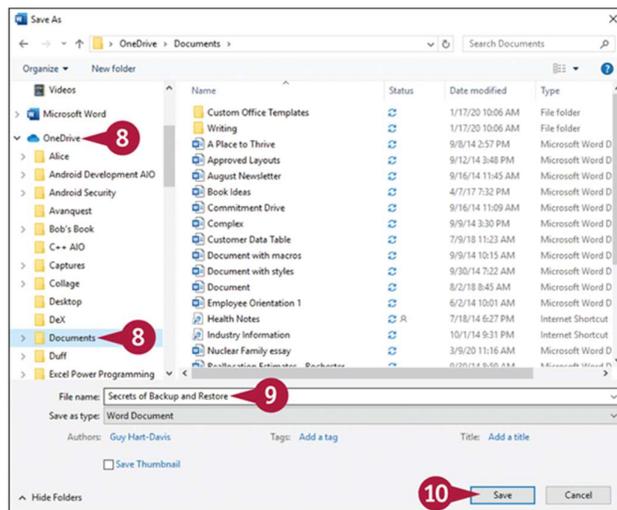
6 Click **Open**.



A The document opens.

B The gray Recover Unsaved File bar identifies the document as a recovered file temporarily being stored on your computer.

7 Click **Save As**.



The Save As dialog box opens.

8 Navigate to the folder in which you want to save the document. For example, click **OneDrive**, and then click the appropriate folder.

9 Edit the suggested file name, or type a new filename over it.

10 Click **Save**.

The Save As dialog box closes.

Word saves the document and removes the gray Recover Unsaved File bar.

TIPS

How often does Word save a document while I work on it?

By default, Word automatically saves your work—even on documents you have not yet saved—every 10 minutes. If you work quickly, this is far too seldom. You can reduce the auto-save interval by changing the options for saving documents; see the section “[Set Options for Saving Documents](#)” for details.

Is there another way to open the dialog box that shows unsaved documents?

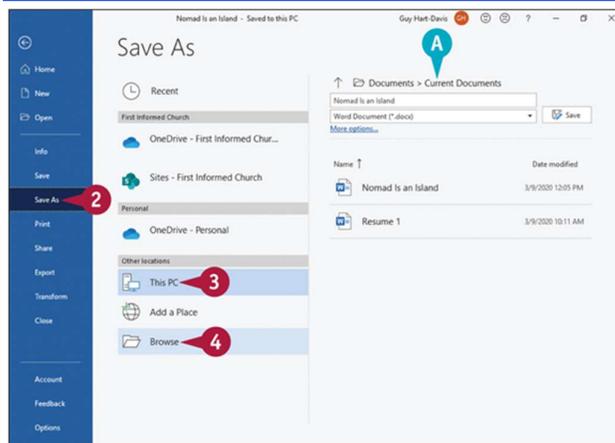
Yes. Click **File**, and then click **Open**. At the bottom of the Recent Documents list in Backstage View, click **Recover Unsaved Documents**.

Save a Document in a Different Format

You can save documents you create in Microsoft Word in a variety of other formats, such as Word templates, Word macro-enabled documents, OpenDocument Text files, or even plain-text files. One outdated format you may need to use is the Word 97–2003 format, which Word used by default up to Word 2003 for Windows and Word 2004 for Mac.

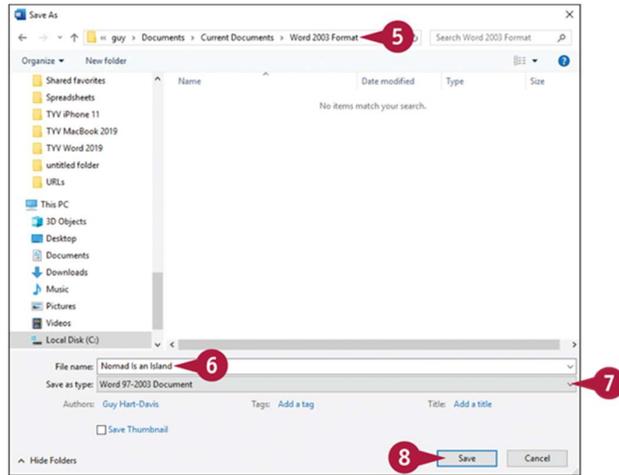
This section shows you how to save a document to Word 97–2003 format, but the steps for using any other file format that Word supports are similar.

Save a Document in a Different Format



- 1 With the document open, click **File**.
Backstage View appears.
- 2 Click **Save As**.
The Save As pane appears.
- 3 Click **This PC**.
- A If the folder in which you want to save the document appears in this list, click it and skip to step 6.

4 Click **Browse**.



The Save As dialog box opens.

5 Click the folder you want to save the document in.

6 Type a name for the document.

7 Click to display the formats available for the document, and click **Word 97-2003 Document**.

8 Click **Save**.

Note: If you save a complex document, you might see the Compatibility Checker dialog box, which summarizes changes Word will make when saving your document. Click **OK**.

The Save As dialog box closes.

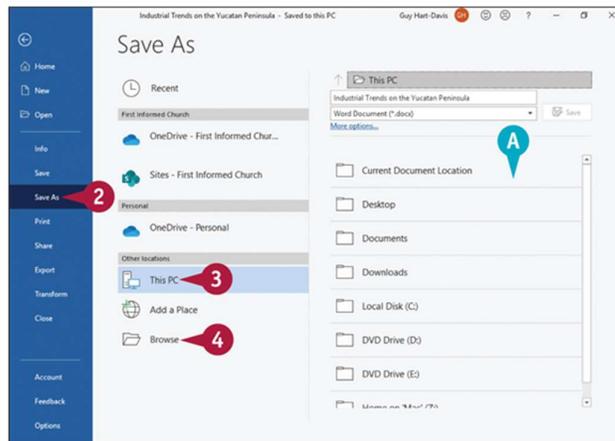
Word saves the document in the format you chose.

Save a Document in PDF or XPS Format

You can save Word documents in PDF or XPS formats. The PDF format is a universal format that any computer user can open using a PDF reader program. There are many free PDF reader programs; perhaps the most well-known one is Adobe Systems' free Acrobat Reader. Windows 8 and Windows 10 come with a built-in PDF reader.

XPS is Microsoft's alternative to PDF. Windows 10, Windows 8, and Windows 7 come with an XPS viewer; users of other versions of Windows can view XPS documents using Internet Explorer 7 or higher.

Save a Document in PDF or XPS Format



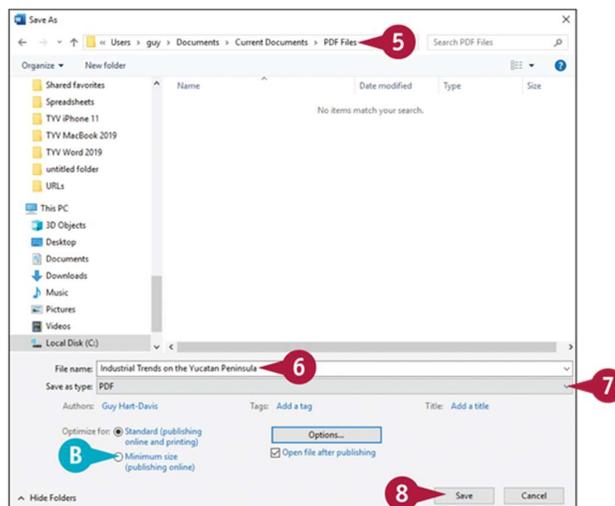
1 With the document open, click **File**.
Backstage View appears.

2 Click **Save As**.
The Save As pane appears.

3 Click **This PC**.

A If the folder in which you want to save the document appears in this list, click it and skip to step 6.

4 Click **Browse**.



The Save As dialog box opens.

5 Click the folder in which you want to store the new file.

6 Click here and type a name for your document.

7 Click to select either **PDF (*.pdf)** or **XPS Document (*.xps)**.

Note: If you choose XPS format, you can opt to save and then open the document.

8 If you plan to use your document online only, you can select **Minimum size** (○ changes to ○).

8 Click **Save**.

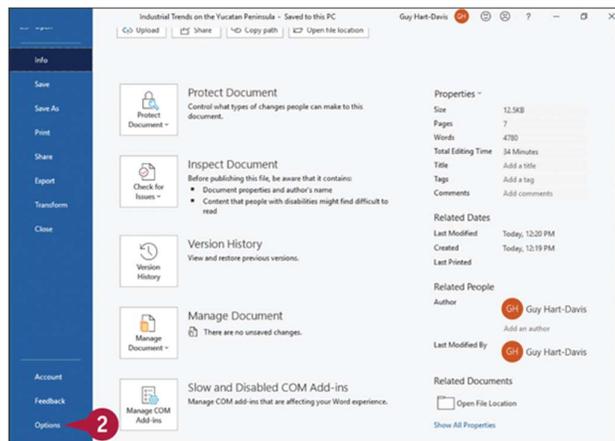
Word saves the document in the selected format.

Set Options for Saving Documents

By default, Word saves documents in the Word Document format, which uses the .docx file extension; automatically saves changes to the documents you store on OneDrive or the SharePoint Online services; and automatically saves your work every 10 minutes to help you recover from crashes and other problems.

You can configure Word's settings for saving documents by working in the Save category of the Word Options dialog box. For example, you may want to reduce the AutoRecover interval from 10 minutes to a shorter period.

Set Options for Saving Documents

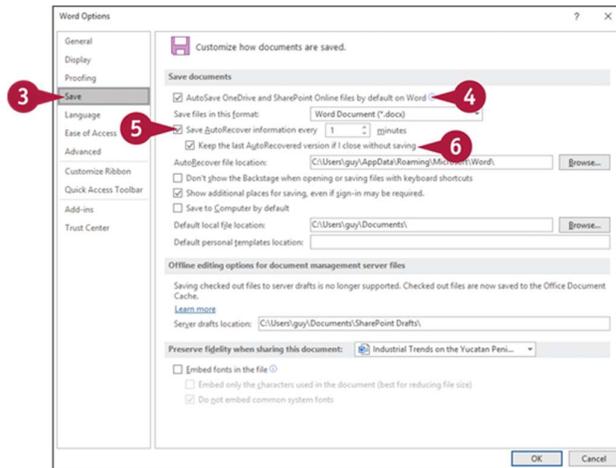


1 Click **File**.

Backstage View appears.

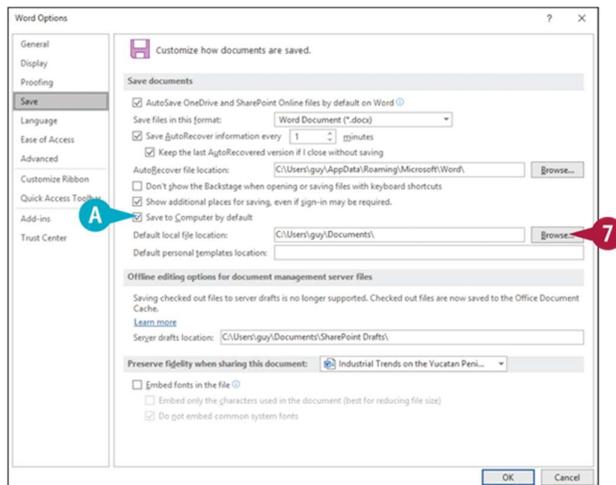
2 Click **Options** at the bottom of the left pane.

Note: You may need to scroll down to see the Options button.

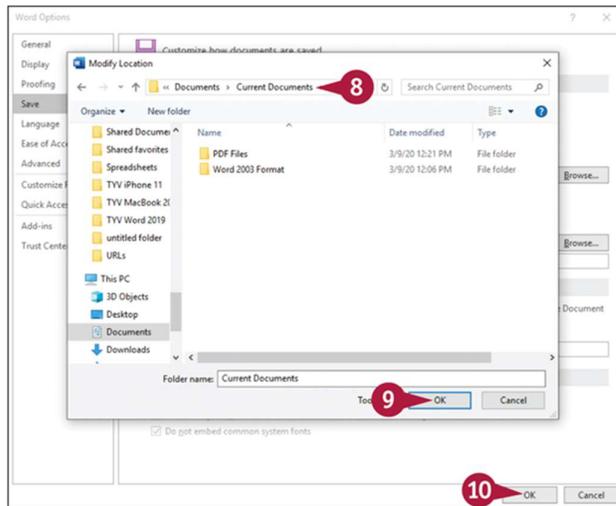


The Word Options dialog box opens.

- 3 Click **Save**.
- 4 Select **AutoSave OneDrive and SharePoint Online files by default on Word** () if you want Word to save your Cloud files automatically.
- 5 Select **Save AutoRecover information every** () and specify an interval for saving recovery information.
- 6 Select **Keep the last AutoRecovered version if I close without saving** () to make sure Word saves unsaved documents.



- A If you want to save documents to your computer rather than to OneDrive, click **Save to Computer by default** (changes to)
- 7 Click **Browse** next to Default Local File Location.



The Modify Location dialog box opens.

8 Navigate to the folder where you want Word to save documents by default.

9 Click **OK**.

The Modify Location dialog box closes, returning you to the Word Options dialog box. You can repeat steps 7 to 9 to set the AutoRecover File locations.

10 Click **OK**.

The Word Options dialog box closes.
Word saves your changes.

TIP

What happens if I select the Don't Show the Backstage When Opening or Saving Files option?

To take full advantage of this option, you need to add the Open button and the Save As button to the Quick Access Toolbar. When you opt not to show Backstage View, and then click the Open button or the Save As button, Word displays the Open dialog box or the Save As dialog box without showing Backstage View. If you are comfortable navigating folders, enabling this option saves you time. See [Chapter 11](#), “Customizing Word,” for instructions on customizing the Quick Access Toolbar.

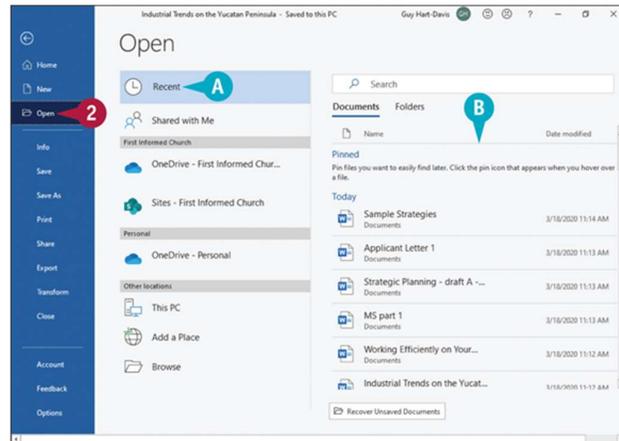
Open a Word Document

You can open documents that you have created and saved previously to continue adding data or to edit existing data. Regardless of whether you store a file in a folder on your computer's hard drive or online, you can easily access files using the Open dialog box. If

you are not sure where you saved a file, you can use the Open dialog box's Search function to locate it.

When you finish using a file, you should close it to free up processing power on your computer. See the second tip in this section.

Open a Word Document



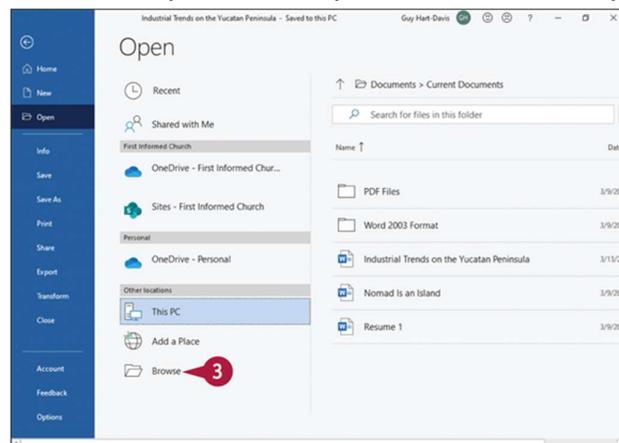
1 Click **File**.

Backstage View appears.

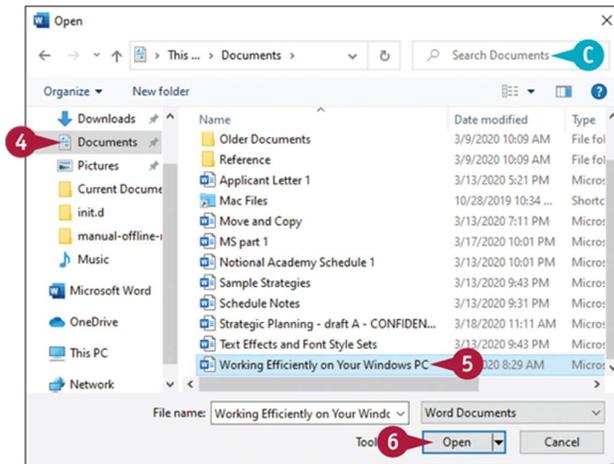
2 Click **Open**.

A Word automatically selects Recent as the default location.

B Recently opened documents appear here. If you see the file you want to open, you can click it to open it and skip the rest of these steps.

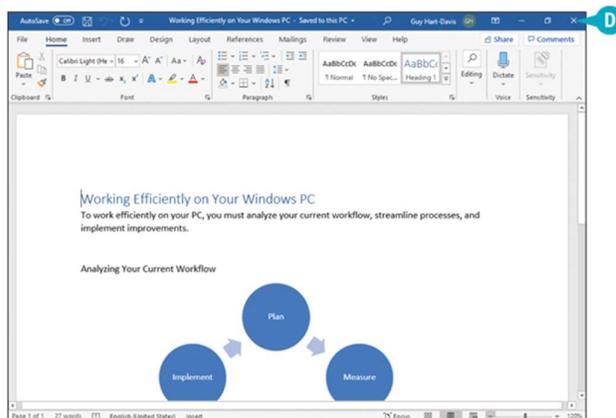


3 Click **Browse**.



The Open dialog box appears.

- 4 Click the folder that contains the document you want to open.
- C If you chose the wrong place, you can search for the file by typing part of the filename or content here.
- 5 Click the document you want to open.
- 6 Click **Open**.



The document appears on-screen.

- D To close a file, click × in the upper-right corner. If you have not saved the file, the program prompts you to save it.

TIPS

What if I cannot find my file?

You can use the search box in the upper-right corner of the Open dialog box to locate files. Complete steps 1 to 3 to display the Open dialog box. Locate and open the folder in which you believe the file was saved and type the file's name in the search box. Files containing the search term appear highlighted along with files containing a close match.

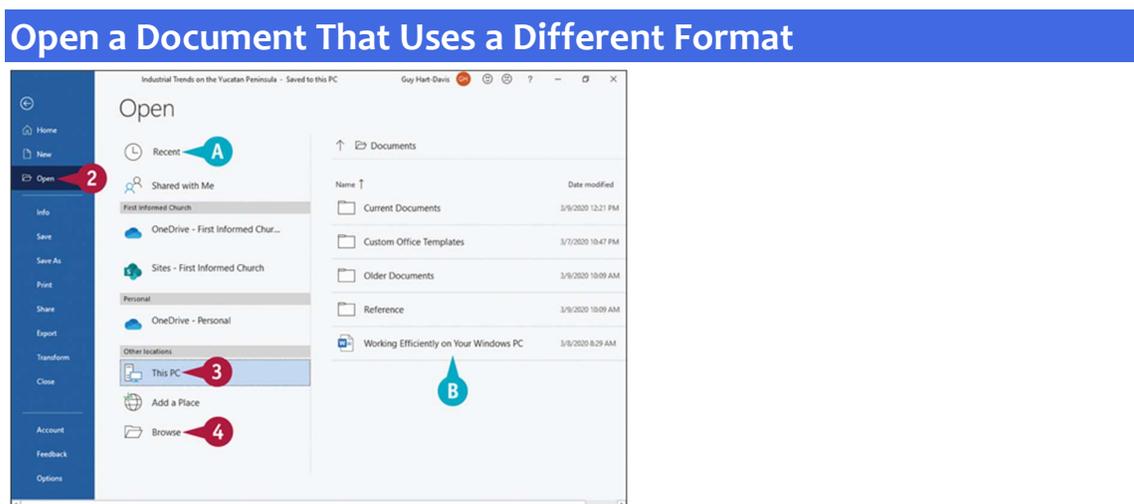
How do I close a document?

While viewing the document, click **File** to display Backstage View, and then click **Close**.

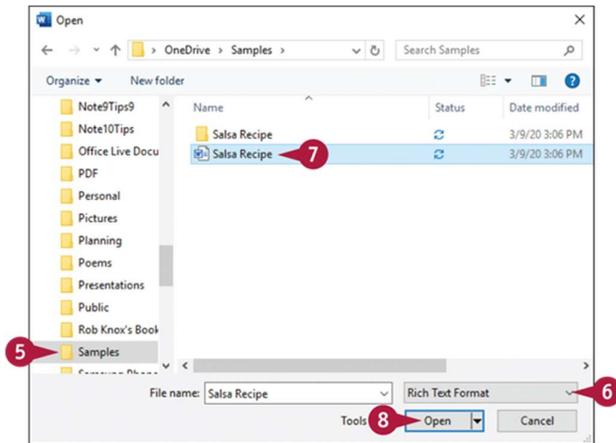
Open a Document That Uses a Different Format

You can open and edit documents created in other word processing apps or text editors. Word can open XML, web page, rich text, plain-text, OpenDocument, PDF, WordPerfect 5.x or 6.x, or Works 6–9 documents as well as documents created in earlier versions of Word.

Although you can open and edit PDF files, editing PDF files in Word works best if you used Word to originally create the PDF file. If you used a different program to create the PDF file, you may find that Word has difficulty maintaining the file's formatting.

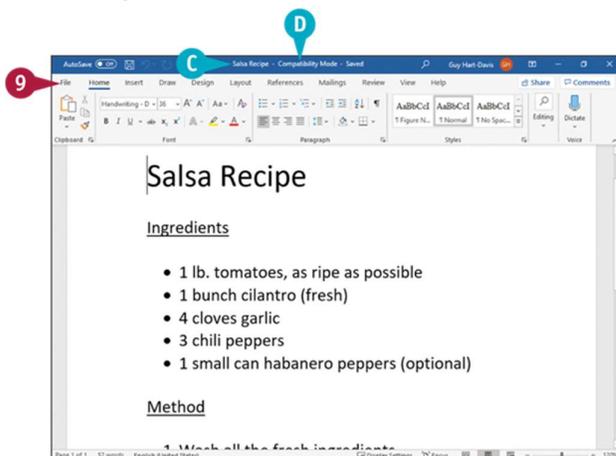


- 1 Click **File**.
Backstage View appears.
- 2 Click **Open**.
- A You can click **Recent** to see a list of recently opened documents. If you see the file you want to open, you can click it to open it and skip the rest of these steps.
- 3 Click the place where you think the document is stored. This section uses **This PC**.
- B If the folder containing the document appears here, click it and skip to step 5.
- 4 Click **Browse**.



The Open dialog box appears.

- 5 Click in the folder list to navigate to the folder containing the file you want to open.
- 6 Click , and then click the type of file you want to open.
The Open dialog box shows files of that type.
- 7 Click the file you want to open.
- 8 Click **Open**.

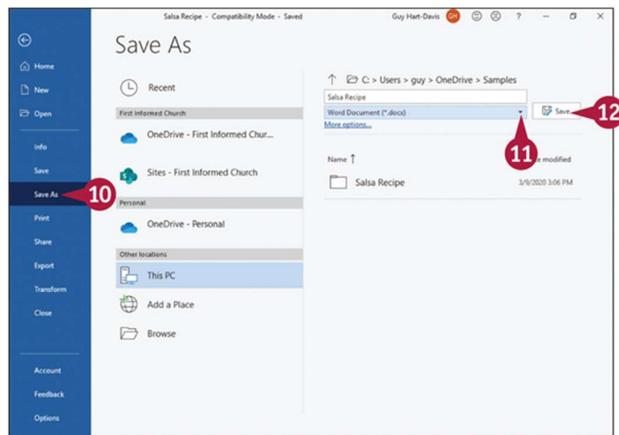


If you open a PDF file, Word displays a message indicating that it is converting your PDF file to an editable Word document; click **OK** to continue.

Note: You may be prompted to install a converter to open the file; click **Yes** or **OK** to install the converter and open the file.

- C Word opens the file.
- D The title bar shows *Compatibility Mode* to indicate that the file is not in Word Document format.

9 To save the file in Word Document format, click **File**.



Backstage View appears.

10 Click **Save As**.

The Save As pane appears.

11 Click , and then click **Word Document (*.docx)**.

12 Click **Save**.

Word saves the file in the Word Document format.

TIP

How do I open an XPS file?

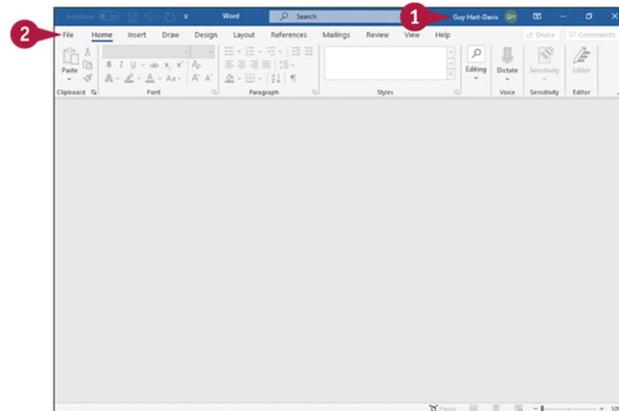
Although you can create an XPS file in Word, you cannot open the file in Word. Instead, you can use an XPS viewer, or in Windows 10, you can use the Reader app. To open an XPS file, find it using File Explorer and double-click it.

Open a Document from the Cloud

Storing your documents on OneDrive enables you to access them from anywhere and makes it easy to work on the same documents on all your devices. For example, you can start a document on your PC, work on the document on your phone or tablet while out and about, and then resume work seamlessly on your PC.

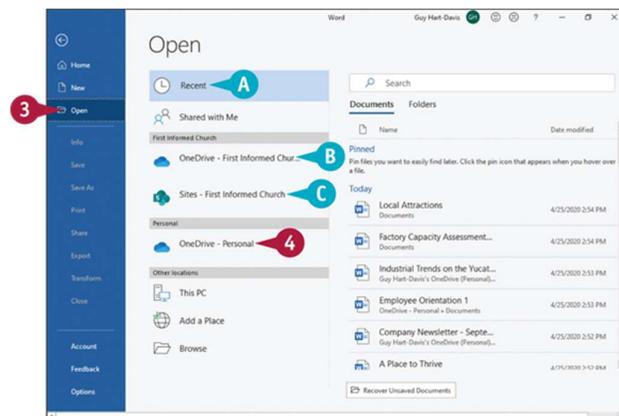
Documents stored in your OneDrive folder are automatically synced with your cloud storage, keeping all versions up to date.

Open a Document from the Cloud



1 Make sure you have signed in to your Microsoft 365 subscription by looking for your name here.

2 Click **File**.

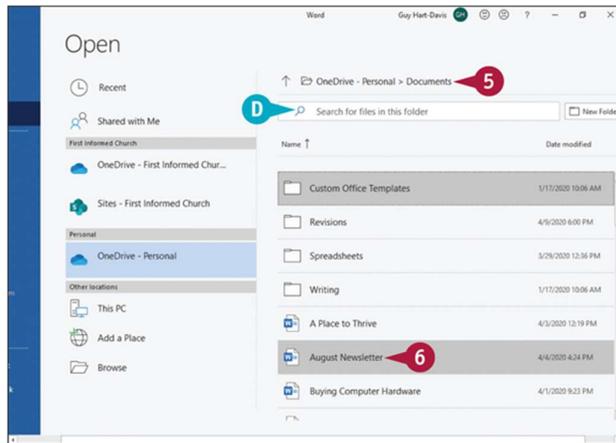


Backstage View appears.

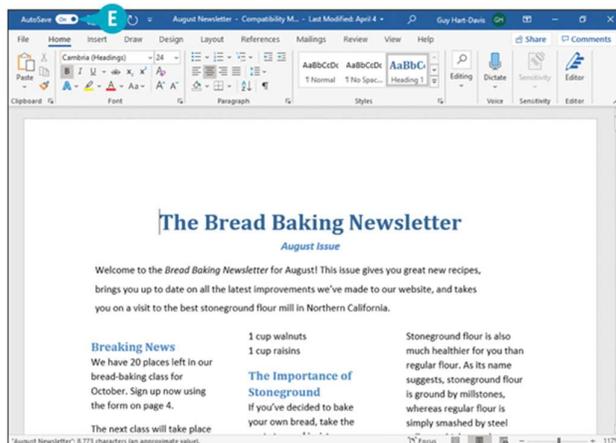
3 Click **Open**.

A Word automatically selects Recent as the default location.

4 Click the appropriate OneDrive account. This example uses the personal OneDrive account.



- B You may also have a business OneDrive account.
- C You may also have access to one or more SharePoint servers.
The contents of that OneDrive appear.
- 5 Navigate to the folder that contains the document you want to open.
- D You can use the search box to search the current folder using keywords.
- 6 Click the document you want to open.



The document opens, and you can edit it as normal.

- E By default, Word sets the AutoSave switch to On for a document stored on OneDrive or SharePoint. When AutoSave is On, you do not need to save changes manually.

TIP

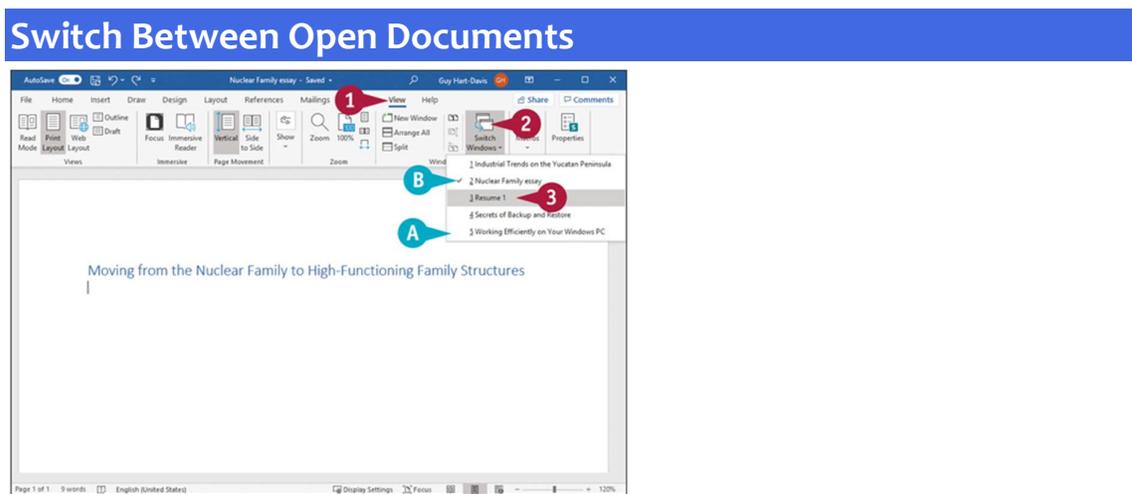
What happens if I leave a OneDrive document open on my PC and then change the document on my phone?

As long as you leave the AutoSave feature enabled, OneDrive automatically synchronizes the changes you make across the different versions of the document. In this case, when you return to your PC, OneDrive will have updated the document with the changes you made on your phone.

Switch Between Open Documents

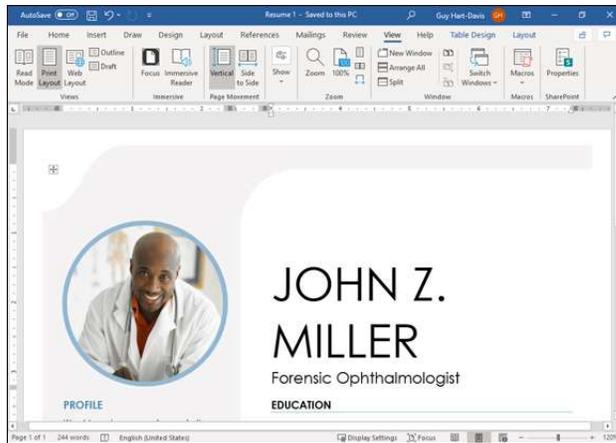
Word enables you to open as many documents as you need and to switch between them quickly. For example, you may need to copy information from one document to another, or you may simply need a change of focus.

You can switch between your open documents either by using the Switch Windows menu on the View tab of the Ribbon in Word or by using the Windows taskbar.

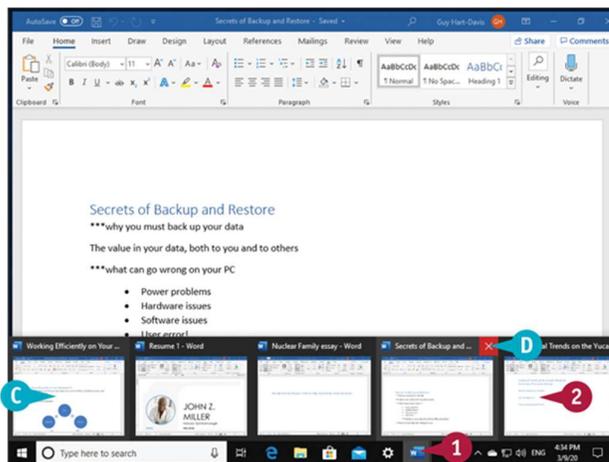


Switch Documents Using Word

- 1 Click **View**.
The View tab appears.
- 2 Click **Switch Windows**.
 - A The menu displays a list of all open documents.
 - B A check mark (✓) appears beside the currently active document.
- 3 Click the document you want to view.

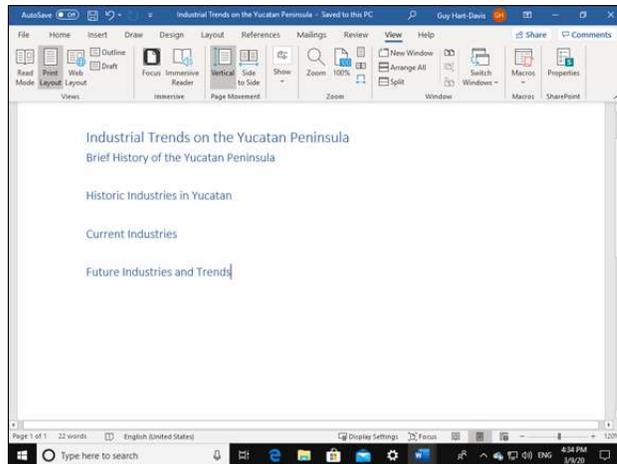


The selected document appears.



Switch Documents Using the Windows Taskbar

- 1 Position the mouse (🖱️) over the Word button in the Windows taskbar.
- C Preview thumbnails appear for each open document. The document over which you position the pointer (🖱️) also previews in Word.
- D You can close a document by moving the pointer over a thumbnail, and then clicking **Close** (X).
- 2 Click the preview of the document you want to display.



The document appears.

TIP

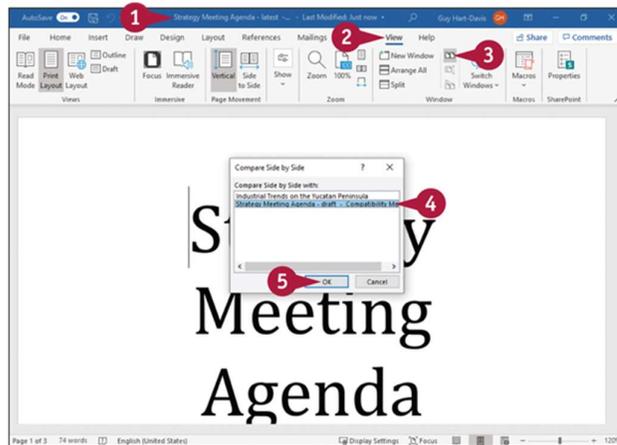
How can I keep the taskbar buttons separate from each other instead of stacked on top of each other?

Right-click the clock readout, and then click Taskbar Properties in the context menu that opens. The Taskbar screen in the Settings app appears. Click **Combine taskbar buttons** () , and then click **Never**; alternatively, click **When taskbar is full** to stack the buttons only when the taskbar is full. Click **Close** (X) to close the Settings app.

Compare Two Documents Side by Side

When you need to compare two documents, you can use Word's View Side by Side feature, which places the documents in equally sized windows alongside each other, making the contents easy to compare. The View Side by Side feature also provides two helpful features: First, it synchronizes the scrolling of the two windows, so when you scroll one window up or down, and the second window follows suit; and second, it synchronizes the zoom, enabling you to zoom both windows in or out together.

Compare Two Documents Side by Side



1 Open the two documents you want to compare and make one of the documents active.

2 Click **View**.

The View tab appears.

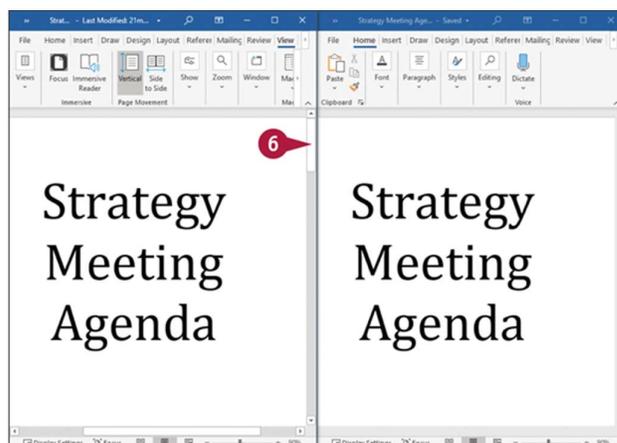
3 Click **View Side by Side** (📄).

The Compare Side by Side dialog box opens, showing a list of your other open documents.

Note: If you have only two documents open, the Compare Side by Side dialog box does not open. Go to step 6.

4 Click the second document for the comparison.

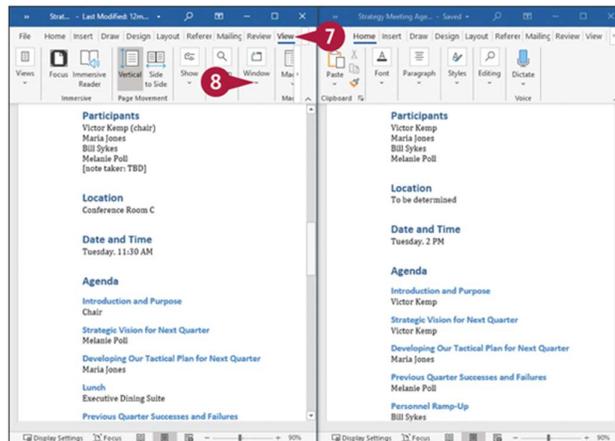
5 Click **OK**.



The Compare Side by Side dialog box closes.

Word displays the documents in two panes beside each other.

6 Drag either document's scroll bar.

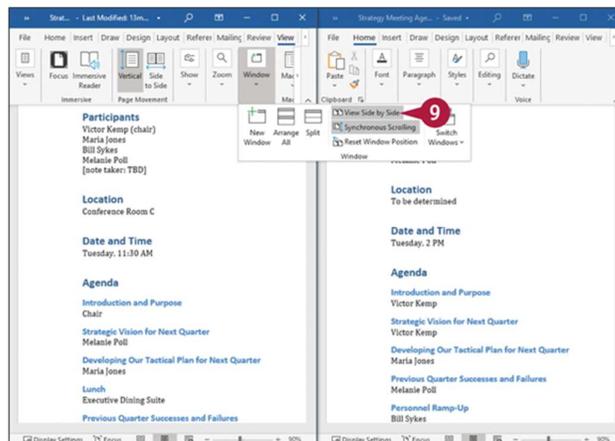


Word scrolls both documents simultaneously.

Note: You can also zoom both documents simultaneously by dragging the zoom slider on the status bar.

7 When you are ready to stop comparing the two documents, click **View** in the document that you want to keep viewing.
The View tab appears.

8 Click **Window**.



The Window panel appears.

9 Click **View Side by Side**.

Word expands the document to its previous size.

Note: The second document remains open.

TIP

What does the Reset Window Position button do?

When you are comparing documents side by side, the **Reset Window Position** button has no effect. But you can use **Arrange All** to place one window above the other, each in its own separate pane. To return to side-by-side viewing, click **Reset Window Position**.