

Chapter 1

Working with Documents

MICROSOFT EXAM OBJECTIVES COVERED IN THIS CHAPTER:

✓ Manage documents

- Navigate within documents
 - Search for text
 - Link to locations within documents
 - Move to specific locations and objects in documents
 - Show and hide formatting symbols and hidden text
- Format documents
 - Set up document pages
 - Apply style sets
 - Insert and modify headers and footers
 - Configure page background elements
- Save and share documents
 - Save documents in alternative file formats
 - Modify basic document properties
 - Modify print settings
 - Share documents electronically
- Inspect documents for issues
 - Locate and remove hidden properties and personal information
 - Find and correct accessibility issues
 - Locate and correct compatibility issues



You're reading this book because you want to study for and pass the MO-100 Microsoft Word (Word and Word 2019) exam and become a certified Microsoft Office Specialist:

Word Associate. I hope you have your favorite beverage nearby, you're comfortable, and you have Word fired up so that you can go through the exercises in this chapter.

Before embarking on a road trip, we often refer to the directions provided by our favorite map app before we leave. In this chapter, I'll show you how to work with documents, including navigating within documents so that you can edit them easily. Next, I'll show you how to format documents to make them look the way you want.

When you know how to control your documents, I'll show you how to save them in the format you want and share them with other people. Finally, I'll show you how to *inspect* your documents so that you can find and remove hidden properties as well as fix any issues with accessibility and compatibility.

I'll have an exercise at the end of every section within this chapter so that you can practice doing different tasks. Then, at the end of this chapter, you'll find a set of review questions that mimic the test questions you'll see on the MO-100 exam.

Navigating Within Documents

It's easy just to fire up Word and start writing. But, of course, you're doing more than just writing. You inevitably need to start moving around the document and making changes to it, and in this section I talk about the tools Word gives you to do those tasks.

Microsoft has added a lot of powerful *search* features to Word so that you can find the text you're looking for pretty easily. You can access these tools through menu options and their associated ribbons, as well as by using keyboard shortcuts.

If you want to move quickly from one location in a long document to another so that you don't have to keep scrolling up and down a lot of pages, Word makes it easy to add a *link* within your document. You can also use tools in the ribbon, as well as keyboard shortcuts, to go to different spots in your document.

Word also has a lot of hidden formatting symbols that you can show. What's more, you can hide text that you don't want to see cluttering your document, but Word also makes it easy to reveal *hidden text* whenever you want to see it.

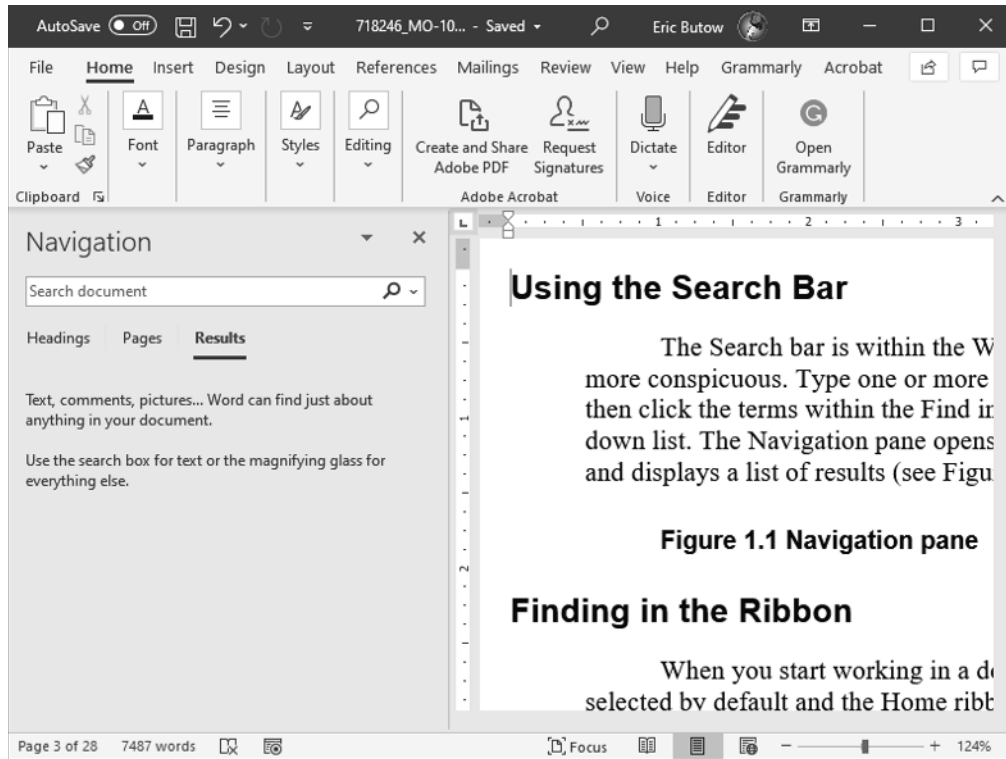
Searching for Text

Unless you have only a small amount of text in your document, you'll find that you need help locating the words that you want. Word has you covered with tools not only to find words in your document, but to replace them easily as well.

Using the Search Bar

The Search bar appears within the Word window's title bar to make it more conspicuous. Type one or more search terms in the Search box, and then click the terms within the Find In Document area in the drop-down list. The Navigation pane opens on the left side of the Word window and displays a list of results (see Figure 1.1).

FIGURE 1.1 Navigation pane



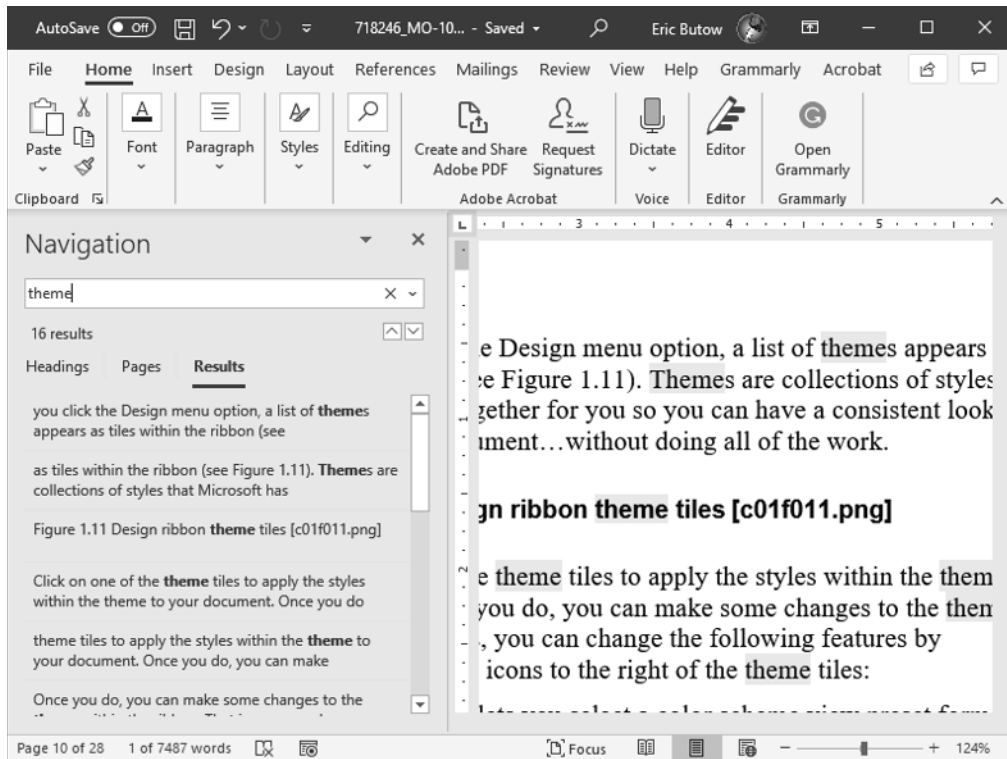
Finding in the Ribbon

When you start working in a document, the Home menu option is selected by default and the Home ribbon appears underneath. Within the Home ribbon, icons appear separated into several sections. On the right side of the ribbon, the Editing section contains the Find icon.

After you click the icon, the Navigation pane appears. Within the pane, type your search term(s) in the Search box and then Word shows you a list of results, as shown in Figure 1.2. Word also takes you to the first instance of the search term(s) in the document itself.



Microsoft places the titles of each section within a ribbon at the bottom center of the section instead of the top.

FIGURE 1.2 List of search results

Replacing in the Ribbon

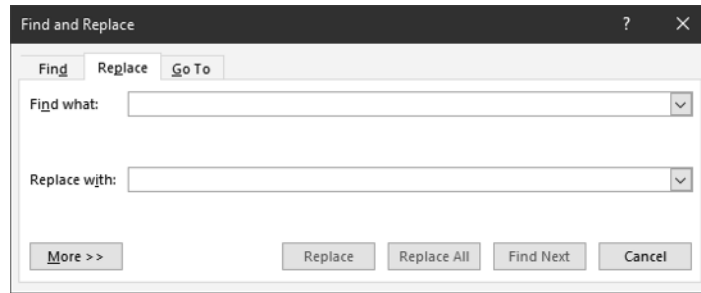
Sometimes, you may want to find a word in order to replace it, such as when you need to replace a product name with an updated one throughout your document. It's easy to do this in the Home screen by clicking Replace on the Home ribbon. Just like the Find icon, the Replace icon appears in the Editing section.

After you click the Replace icon, the Find And Replace dialog box appears with the Replace tab open (see Figure 1.3). This dialog box is probably familiar to you if you've used previous versions of Word because it's been a standard feature (literally) for decades.

Type the existing text you want to find in the Find box. In the Replace box, type the replacement text. Now you can click one of three buttons:

- Click Next to have Word find and highlight the next instance of text in the document.
- Click Replace to have Word replace the next instance of existing text with the replacement text but not replace any other instance. To do that, you need to click the Replace button every time.
- Click Replace All to replace all instances of the existing text in the document with the Replacement text.

FIGURE 1.3 Find And Replace dialog box



When you click Replace All, Word searches the document after the point where your cursor is located within the document. Once Word reaches the end of the document, a dialog box appears that asks if you want to continue searching from the beginning of the document. If you click Yes, Word continues searching and replaces any other existing text it finds. When Word finishes finding and replacing, a dialog box opens and tells you how many changes it made within the document.

Opening the Navigation Pane

I said earlier in this chapter that you can open the Navigation pane by clicking Find in the Home ribbon. The Navigation pane stays active until you close it by clicking the Close icon in the upper-right corner of the pane.

However, you don't need to click the Find icon in the Home ribbon every time you need to open the Navigation pane. Click the View menu option, and then click the Navigation Pane check box in the View ribbon. It's in the Show section, as you see in Figure 1.4. You can close the pane again whenever you want.

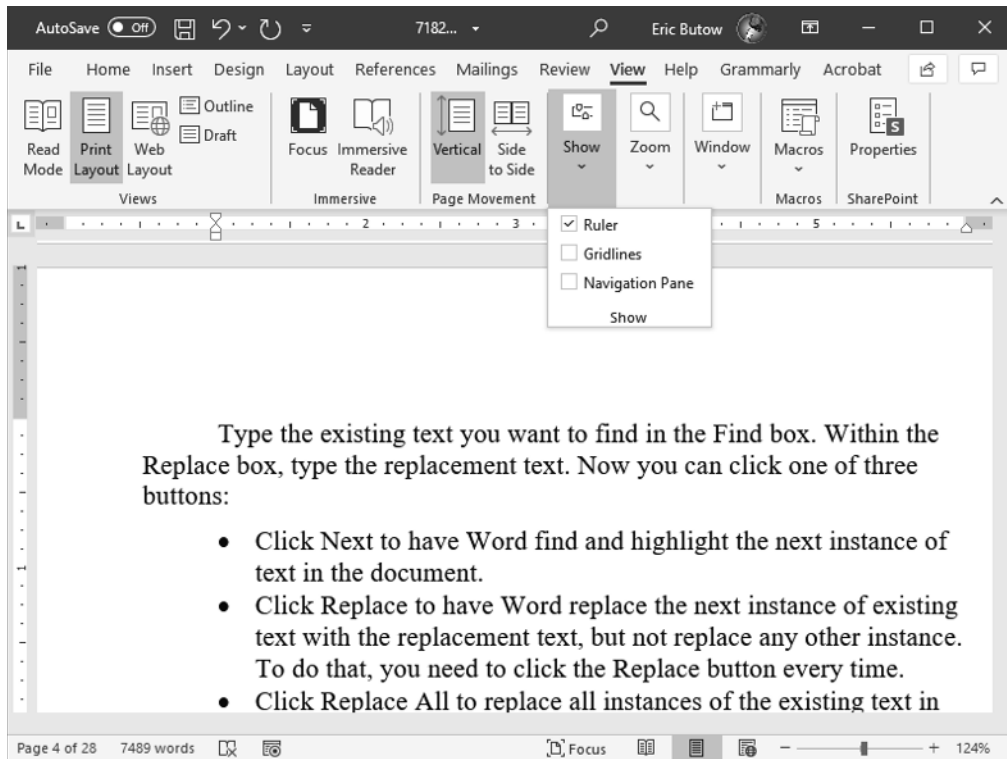


You may need to click the Show icon in the ribbon and then click the Navigation Pane check box from the drop-down menu if your window is too small for the ribbon to show the check box.

Replacing with the Keyboard

Word has had support for keyboard shortcuts since the first version of Word for Windows was released in 1989. (Windows 2.0 had much better keyboard support than its predecessor, fortunately.)

It's easy to open the Navigation pane using the keyboard—just press Ctrl+F. If you want to open the Find And Replace dialog box, use the same key combination that Word has used for decades: Ctrl+H.

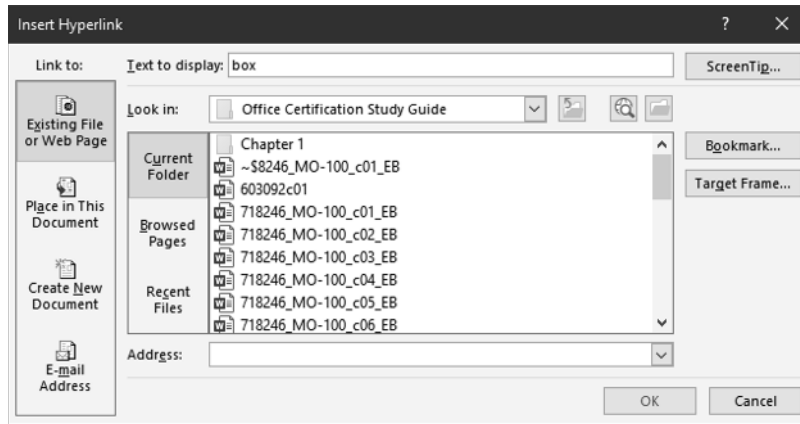
FIGURE 1.4 The Navigation Pane check box

Linking to Locations Within Documents

You can put in a link in one place in your document that links to another place, such as a link on page 27 that will take you to the beginning of the document. Here's how to do it:

1. Click the word in the document that you want to use in the link.
2. Click the Insert menu option.
3. Within the Insert ribbon, click the Link icon.
4. Click Insert Link in the drop-down menu.
5. In the Insert Hyperlink dialog box shown in Figure 1.5, click the Place In This Document option under Link To.
6. Click what you want to link to. From the Select A Place In This Document list box, click Top Of The Document, for example.
7. Click OK.

Now the link appears in your text.

FIGURE 1.5 Hyperlink dialog box


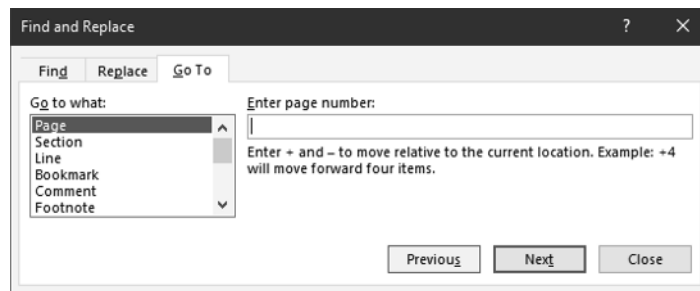
Moving to Specific Locations and Objects in Documents

Word makes it easier (I didn't say easy) to move to a specific location or an object. Start by clicking the Home menu option if it isn't already open.

Within the ribbon, click the down arrow to the right of Find (it's in the Editing section). Click Go To in the drop-down menu.

Now you see the trusty Find And Replace dialog box, but the Go To tab is selected, as shown in Figure 1.6. Scroll up and down in the Go To What list, and then click on what you want to go to. It can be a location, such as a page in your document, or an object, such as a graphic.

What you see next depends on what you select. The default place to go is on a page in your document, so type the page number and then click Next to go to that page. You click an object in the list and then select an object by clicking in the Any Object list to view the list of options. When you click one, click Next to move the cursor to it.

FIGURE 1.6 Go To tab


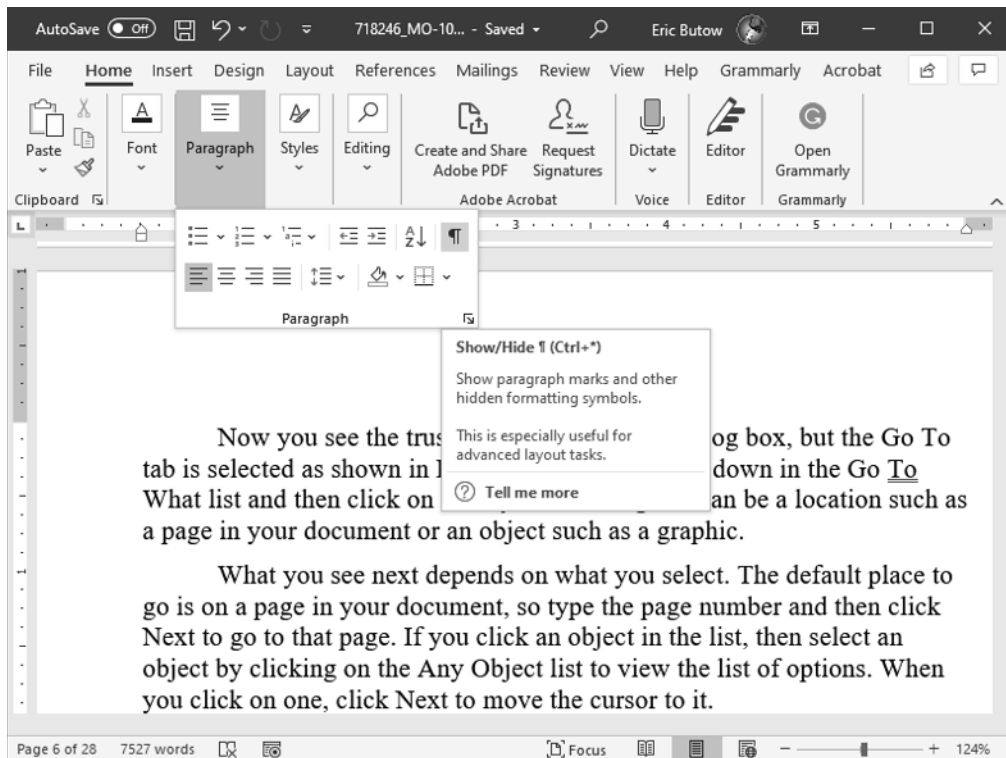
Showing and Hiding Formatting Symbols and Hidden Text

Word adds a bunch of formatting symbols like paragraph marks in your document, but Microsoft is nice enough not to clutter your document with them by default. You can also hide text such as comments within the document that most people who read it in Word don't need to see.

Formatting Symbols

It's easy to view formatting symbols from within the Home ribbon. In the Paragraph section, click the Show/Hide ¶ icon that looks, of course, like a paragraph mark (see Figure 1.7).

FIGURE 1.7 Show/Hide ¶ icon



Now you see all the paragraph marks and other symbols, like a square dot that denotes a space. When you're done, click the icon again to turn off the formatting symbols.



If you want to turn formatting symbols on and off more quickly, press Ctrl+Shift+8 on your keyboard.

Hidden Text

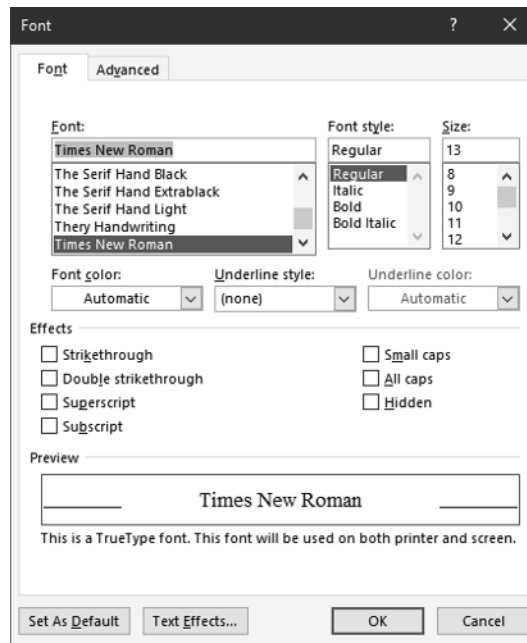
You can hide text that you select within the document, and you can even hide text in the entire document.

Selected Text

Here's how to hide selected text (and show it again):

1. Select the text that you want to hide.
2. Right-click in the selection, and then click Font in the pop-up menu or press Ctrl+Shift+F on your keyboard.
3. In the Font dialog box, as shown in Figure 1.8, click the Hidden check box under Effects.
4. Click OK.

FIGURE 1.8 Font dialog box



Now the text is hidden and doesn't show up at all, which leaves you with the potential pitfall of accidentally deleting hidden text. So how do you show the text again?

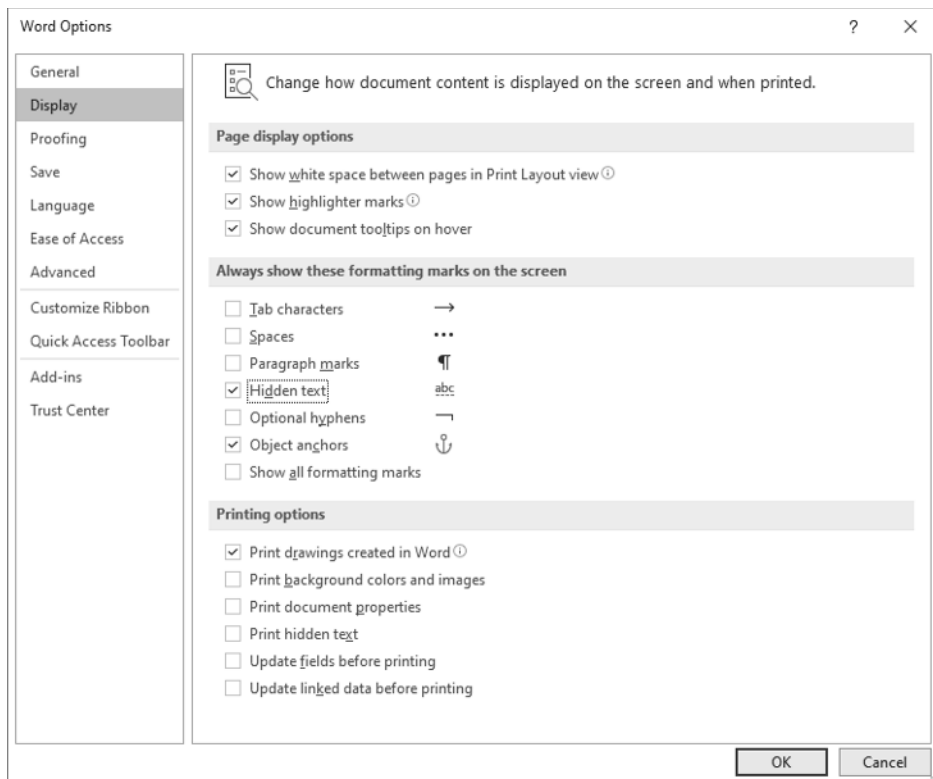
You'll need to show hidden text for the entire document, as I'll describe in the next section. However, if you know where the hidden text is located, then select the text before and after the hidden text. Now you can repeat steps 2–4 and you'll see your text restored.

For the Entire Document

You can tell Word to hide text for the entire document and yet still view the hidden text (with some formatting). This is especially useful if you've lost track of your hidden text. Here's what to do:

1. Click the File menu option.
2. Click Options at the lower left of the File window.
3. In the Word Options dialog box, as shown in Figure 1.9, click Display in the menu at the left side.
4. Click the Hidden Text check box under “Always show these formatting marks on the screen” to show all text with hidden text formatting.
5. Click OK.

FIGURE 1.9 Word Options dialog box



Now all of the hidden text in your document has a dotted black line underneath the hidden characters. If you share the Word document itself, the other person will be able to see the hidden characters. When you save the document to another format (like PDF) or print it, the hidden text doesn't appear.

EXERCISE 1.1

Navigating and Modifying Text in a Document

1. Open an existing Word document, preferably one that has multiple pages.
 2. Open the Navigation pane.
 3. Search for a word and click one of the results in the list to have Word highlight the result on the page.
 4. Replace the word you found by opening the Find And Replace dialog box.
 5. Since the word you want to replace is already in the Find box, type the new word in the Replace box.
 6. Replace all of the words in the document.
 7. Continue by scrolling to the end of the document. An easier way to get to the end is to press Ctrl+End on your keyboard.
 8. Add a new link to the bottom of the page that links to the top of the document.
 9. Select a sentence within a paragraph and hide it.
 10. Unhide the sentence.
-

Formatting Documents

Word uses a basic template, which Word calls the Normal template, for a new document, which Word calls a blank document. When you create a new document, you can also select from various built-in templates, such as a brochure.

However, if you want to format a document to fit your specific needs, you should start with a blank document and then set up your document pages. In this section, I'll tell you how to set up document pages as well as how to create and apply *styles* to text. Styles are a great way to apply *formatting* quickly to more than one block of text.

You may also want to create headers and footers that run at the top and bottom, respectively, of every page. For example, you can add a page number as a footer if you have a long document. I'll talk about those as well as how to create a *background* on each page, such as adding the word "DRAFT" to a document that you want to make sure your readers understand isn't final yet.

At the end of this section, I'll have an exercise for you so that you can learn for yourself how to use Word's tools to format your documents.

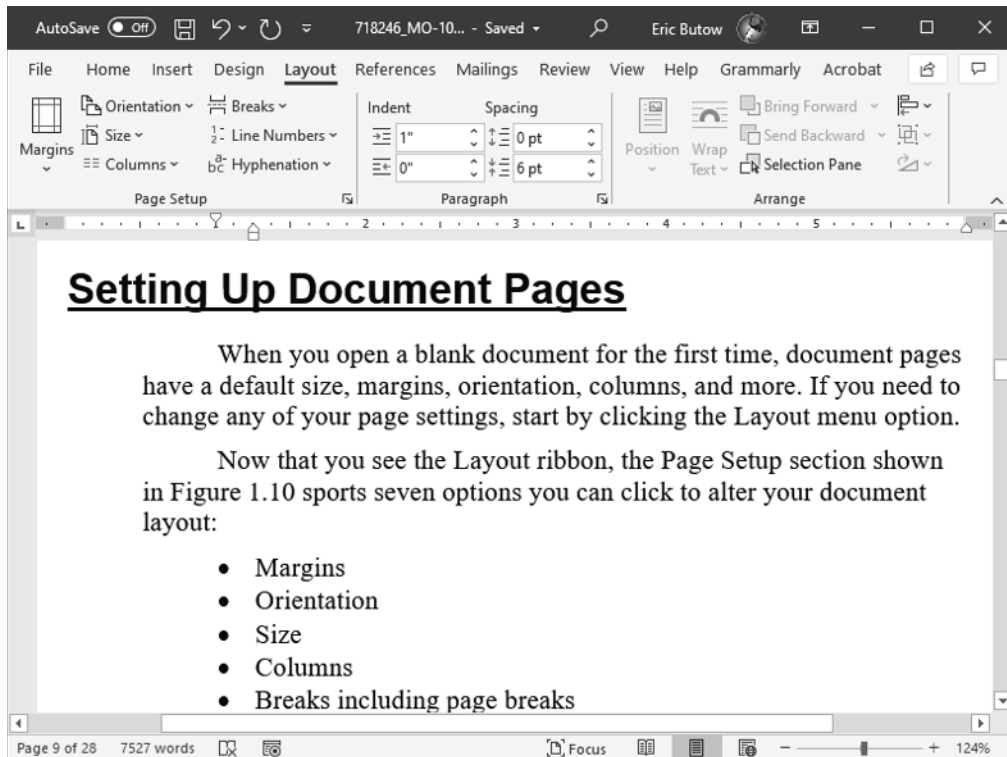
Setting Up Document Pages

When you open a blank document for the first time, document pages have a default size, margins, orientation, columns, and more. If you need to change any of your page settings, start by clicking the Layout menu option.

Now that you see the Layout ribbon, the Page Setup section shown in Figure 1.10 sports seven options that you can click to alter your document layout:

- Margins
- Orientation
- Size
- Columns
- Breaks (including page breaks)
- Line Numbers (which lets you add line numbers to your document)
- Hyphenation

FIGURE 1.10 Page Setup section



The Paragraph section is to the right of the Page Setup section. Here you can view and change the paragraph indent to the left and right, as well as the spacing before and after each paragraph.

The Arrange section is the last section in the ribbon. Here you can arrange a selected object on the page so that it appears where you want it.



I'll talk more about page breaks and other formatting tools in Chapter 2, "Inserting and Formatting Text."

Applying Style Settings

Styles are a great way to save formatting information so that you can apply the style to selected text in your document.

When you select text, a pop-up menu appears above the selected text. In this menu, you can apply a style by clicking **Styles** in the list and then clicking a style tile. Each tile shows you what the text looks like with the style applied.

There are two other ways to find and apply styles: through the **Design** menu and in the **Styles** pane.

Design Menu

When you click the **Design** menu option, a list of themes appears as tiles within the ribbon (see Figure 1.11). Themes are collections of styles that Microsoft has put together for you so that you can have a consistent look and feel within your document. . .without doing all of the work.

Click one of the theme tiles to apply the styles within the theme to your document. Once you do, you can make some changes to the theme within the ribbon. That is, you can change the following features by clicking the icons to the right of the theme tiles:

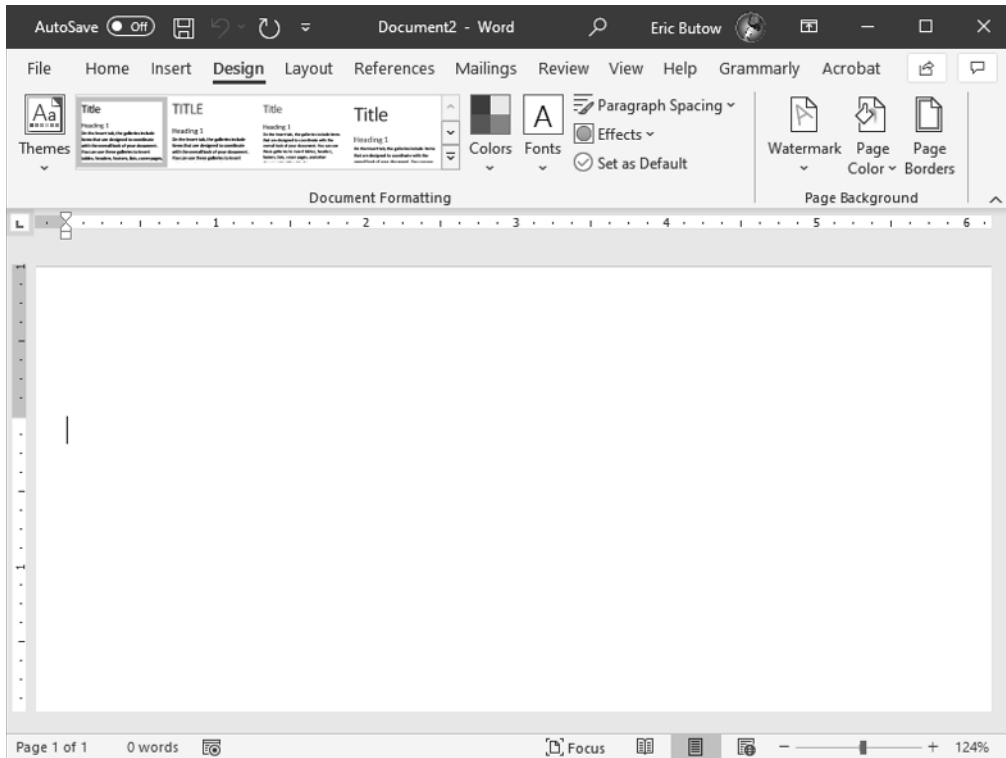
Colors: This lets you select a color scheme and view preset formats within tiles in different colors.

Fonts: This allows you to select a font style and view preset formats within tiles in different fonts.

Paragraph Spacing: Use this to change paragraph spacing between elements.

Effects: This allows you to change effects for illustrations in your document.

Set As Default: Use this to set your theme or format as the default for all new documents.

FIGURE 1.11 Design ribbon theme tiles

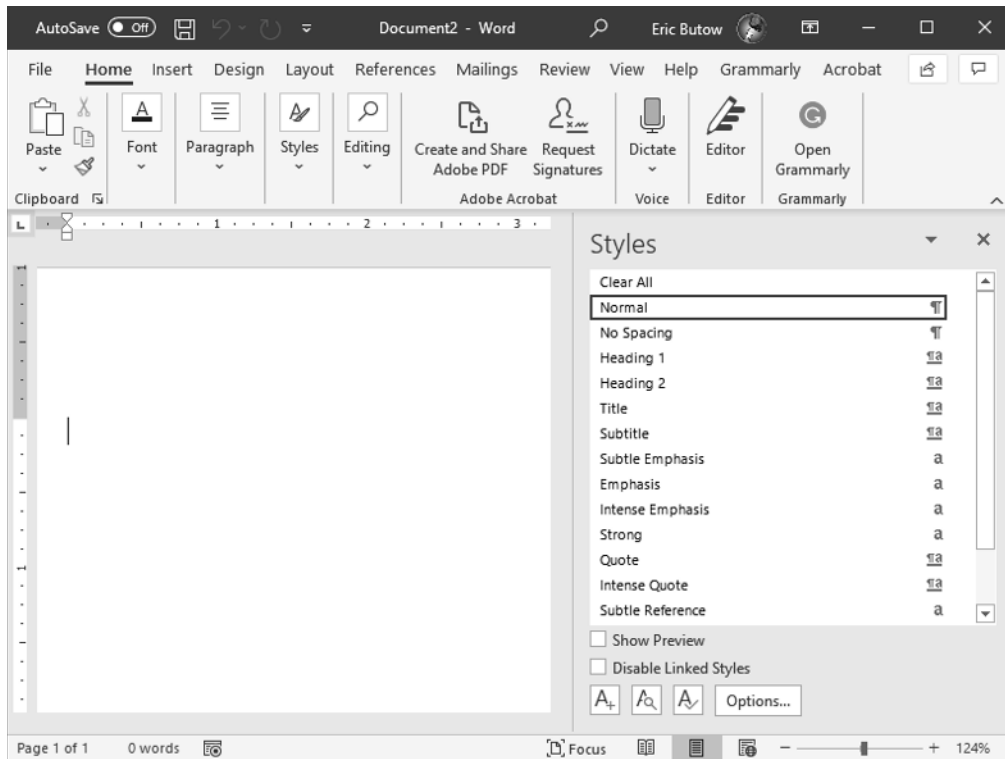
Styles Pane

The catch with using themes is that you have to like the major elements of the theme if you want to use it. A blank document comes with several styles already set up for you, such as heading text.

When you click the Home menu option, open the Styles pane in the ribbon by clicking the down arrow at the bottom right of the Styles area. The Styles list appears, as shown in Figure 1.12, so that you can scroll up and down the list (if needed).

There are two types of styles: paragraph and character. In the list, you see the paragraph mark to the right of the style name. A character style has the lowercase “a” symbol to the right of the name.

Apply the style by clicking the style name in the list. When you click a paragraph style, the style applies to the entire paragraph that you’re writing. But when you click a character style, that style only applies either to selected text or to all text you type after you apply the style.

FIGURE 1.12 Styles pane

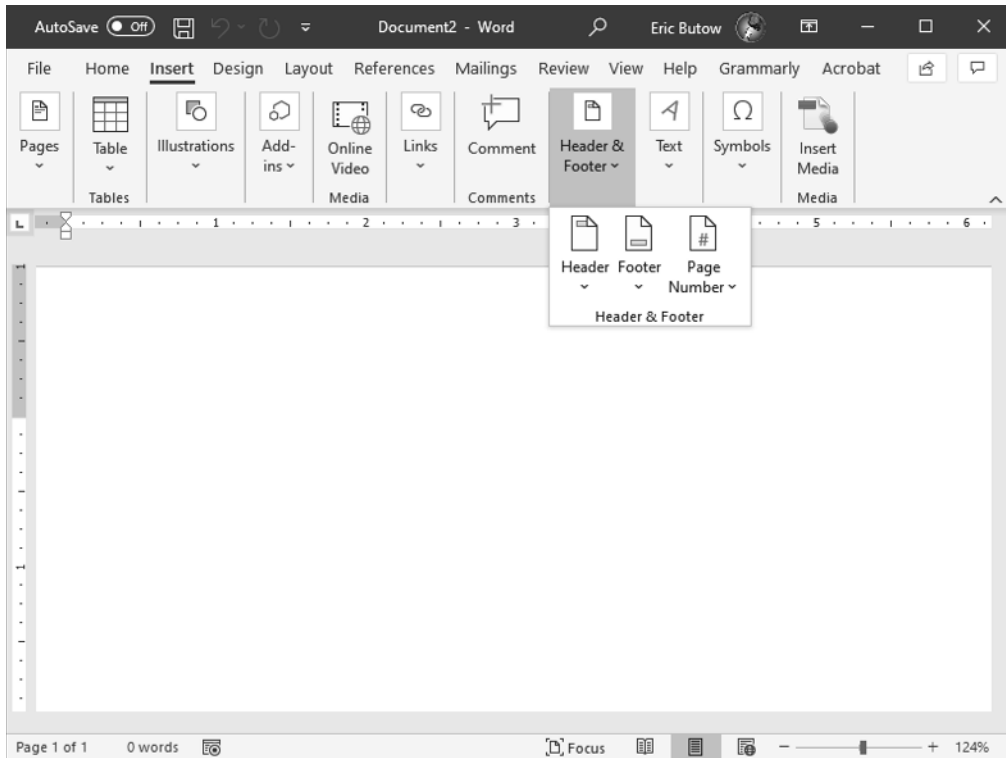
You can also open the Styles pane using the keyboard by pressing Ctrl+Alt+Shift+S. (You may need to use two hands.)

Inserting and Modifying Headers and Footers

Headers and *footers* can provide consistent information about a document on every page so that you don't need to add it every time. One common way to use a header is as a chapter or section name, and a common footer is (you guessed it) a page number.

You can insert a header or footer by clicking the Insert menu option. The Header & Footer section contains icons for adding a header and footer. When you click the Header or Footer icon, you see the same built-in options in the drop-down menu.

The Header and Footer menus are the same, and so are the design options, though the options look a little different as headers and footers. Figure 1.13 shows the Header & Footer menu.

FIGURE 1.13 Header & Footer menu

You can also get more header and footer styles from the Office.com website by moving the mouse pointer over either *More Headers From Office.com* or *More Footers From Office.com* in the menu and then selecting one of the styles from the submenu if one strikes your fancy.

After you click a design option, the header or footer appears at the top or bottom of the page, respectively. How much editing you can do depends on the option you selected. For example, if you selected the *Blank* option at the top of the menu, Word puts a placeholder header or footer so that you can edit it to your liking.

Configuring Page Background Elements

A *watermark* is lighter background text that reinforces the document's status to your readers. If you need to add a watermark, such as "DO NOT COPY" or "DRAFT," or you want the page to be a specific color and/or you want a border on the page, Word has you covered.

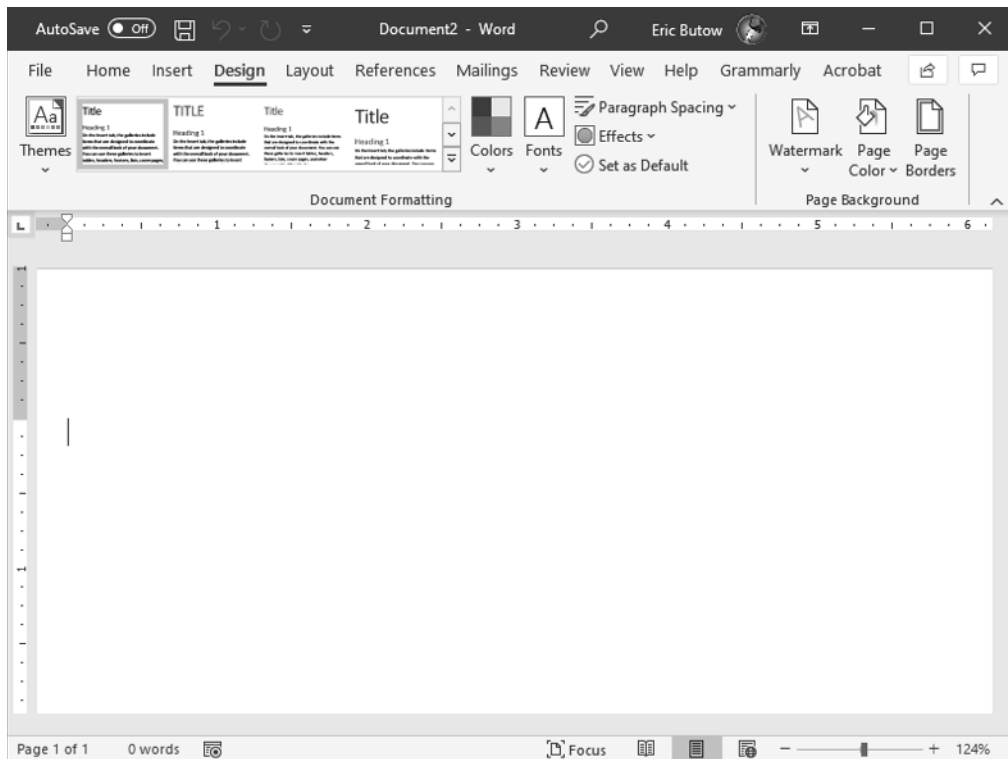
Start by clicking the Design menu option. At the right side of the Design ribbon, the Page Background section, as shown in Figure 1.14, contains three icons that change the look and feel of your background—and give you plenty of customization options.

Watermark Click Watermark to add a preselected watermark. You can add your own by clicking Custom Watermark and then adding a picture or text watermark from the Printed Watermark dialog box.

Page Color Click Page Color to select a color swatch from the Theme Colors drop-down box. You can also select from more colors or set your own by clicking More Colors. What's more, you can add fill effects like a gradient or texture by clicking Fill Effects.

Page Borders Click Page Borders to set the borders on all pages in the Borders And Shading dialog box. You can select the styles of the borders and where one or more borders appear on the page.

FIGURE 1.14 Page Background section



EXERCISE 1.2**Setting Up Your Document**

1. Open a new document.
 2. Change the margins of a page to the prebuilt Narrow setting.
 3. Apply one of the existing themes to your document.
 4. Add a header and footer to your document, and add your preferred built-in header and footer style.
 5. Add a dark blue background page color from the Page Color drop-down list. After you add it, press Ctrl+Z to return to the default white background.
-

Saving and Sharing Documents

You should save your document regularly as you work on it in case your computer loses power or experiences a serious technical problem. You may want to save your document in a different file format, such as when you want to share the document but you want to save a copy in Adobe's *PDF format*. (PDF stands for Portable Document Format.) That way, someone can just leave comments within the PDF document using Adobe's free Adobe Reader program.

In this section, I'll show you not only how to save documents in different formats, but also how to change basic document properties if you're sending a Word document to other people and they need to see basic information like who wrote it and any comments about the file.

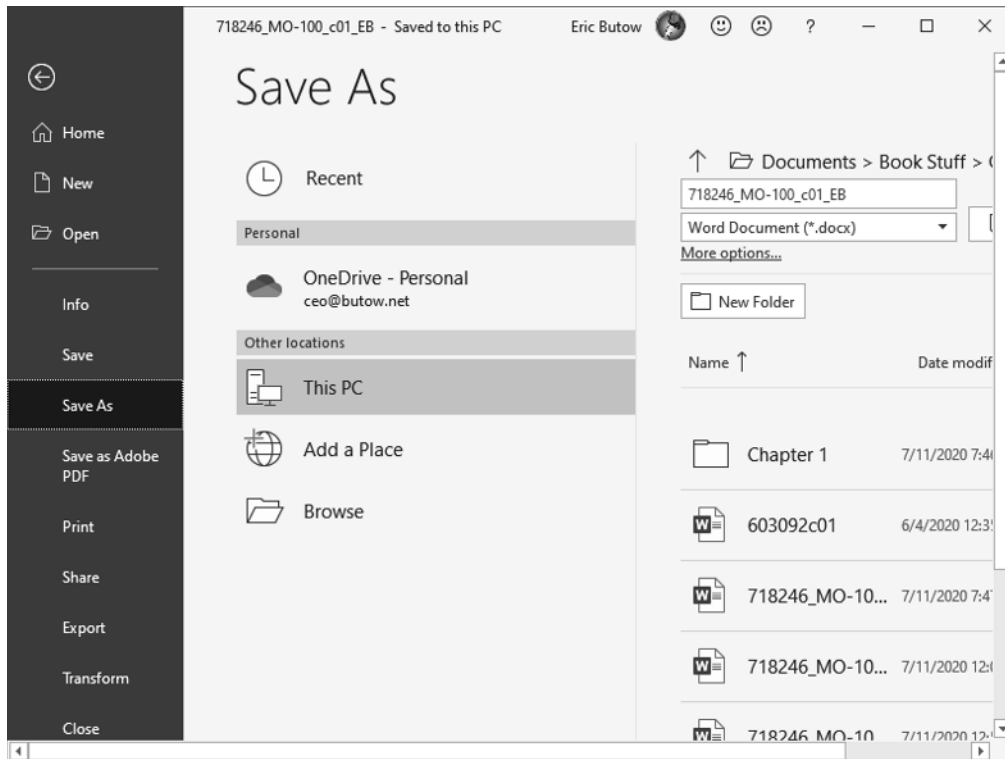
In case you plan to *print* your document to review and/or share with others, I'll tell you how to modify your print settings, such as how to tell Word what pages you want to print. Next, I'll show you Word's *sharing* tools so that you can send your document to one or more people as an email attachment, in PDF format, as a web page, in a blog, or even as a fax document.

Finally, I'll provide an exercise so that you can practice using these tools yourself.

Saving Documents in Alternative File Formatting

Word can save in any one of 16 file formats, including its native DOCX format. Start by clicking the File menu option and then click Save As in the menu on the left side of the File screen.

The Save As screen shows you a list of files that you opened recently, and above that list you can change the file folder, name, and format. When you click the Word Document (*.docx) box, as shown in Figure 1.15, the list of types appears in the drop-down menu. Once you select one, click Save to the right of the box.

FIGURE 1.15 Save As screen

After you save a file, what you see next depends on the format that you selected. For example, if you save to a plain text (.txt) file, you'll see the File Conversion dialog box so that you can tweak the conversion settings. If you save to a Word 97–2003 document, then Word immediately converts the file and shows that older version file in the document window with the words “Compatibility Mode” in the title bar. If you want to continue editing the original file that you created in Word in Office 365 or Word 2019, you need to close the currently open document (your older-version file) and open the original file.

Changing Basic Document Properties

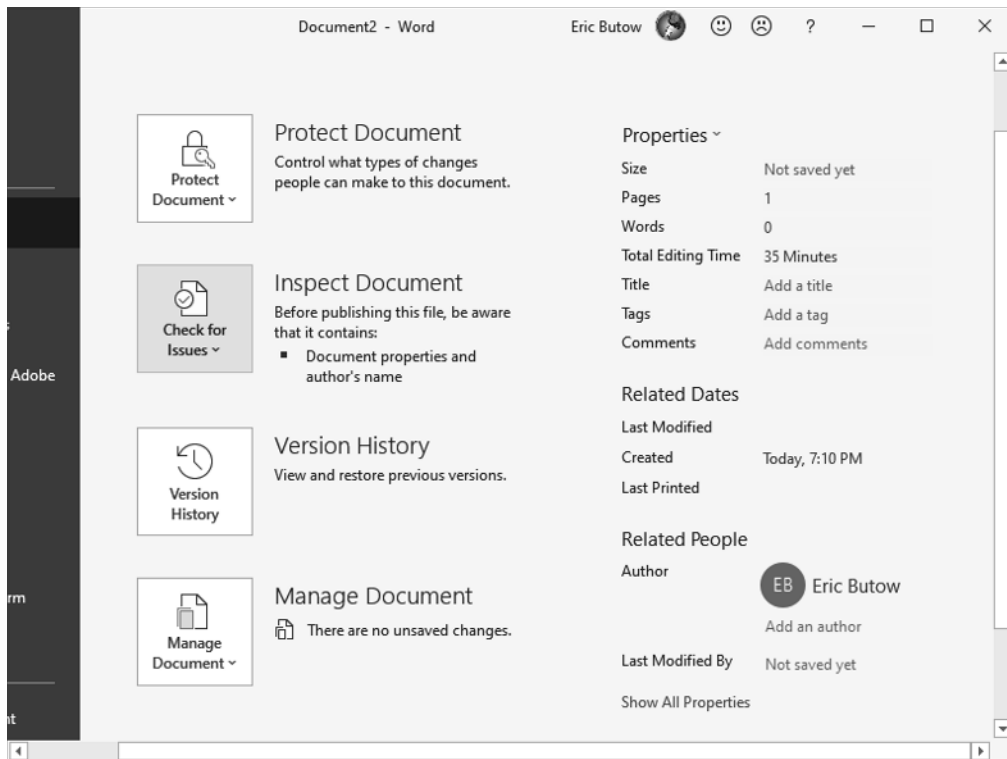
There are standard *properties* and there are those that you can change to help you search for a document in Word and tell people more about the document if they need it.

Start by clicking the File menu option. Now click Info in the menu on the left side of the File screen.

The Info screen contains the Properties area that lists everything you need to know about the document. At the bottom of the list, click Show All Properties. Now you can see all of the properties (see Figure 1.16) and make changes in the following fields:

- Title (if you don't have one)
- Tags to help search for documents in Word
- Comments about the document
- Status of the document
- Categories into which the document falls
- Subject of the document
- *Hyperlink base*, which is the folder path you want to use for all of the hyperlinks that you create in this document
- Company, which is the company that created the document (if any)
- Manager, if there's a manager of your department to whom you report and who is responsible for the document's contents

FIGURE 1.16 Document properties list



If you don't want to see as many properties the next time you open the Info screen, click Show Fewer Properties at the bottom of the list.

Modifying Print Settings

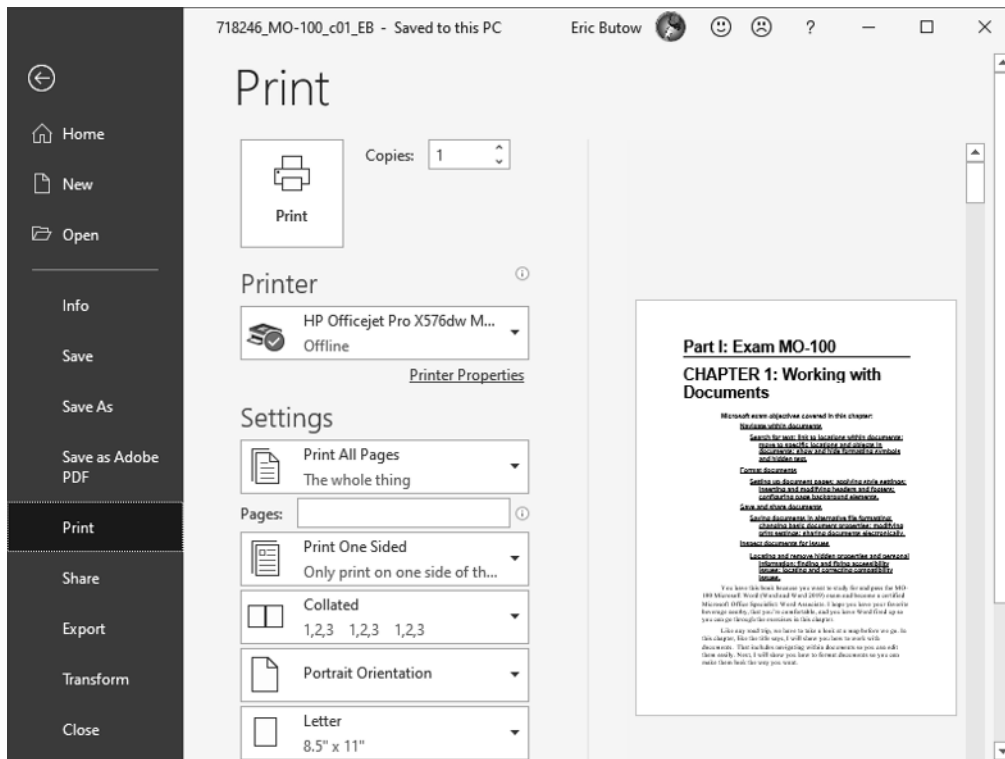
Word easily detects the default printer that you're using in Windows and lets you change the printer settings so that your document appears on paper the way you want.

Start by clicking the File menu option, and then click Print in the menu on the left side of the File screen. Now you see the Print screen, and the print preview area appears on the right side so that you have a good idea of what the document will look like on the printed page.

Between the menu area on the left and the print preview area, the settings menu you see depends on the printer you have.

In my case, as shown in Figure 1.17, I can change the printer to another one that I have installed in Windows. I can also change different settings for the selected printer, including how many pages to print, the page orientation, and if I should print on one or both sides of the paper.

FIGURE 1.17 Print screen



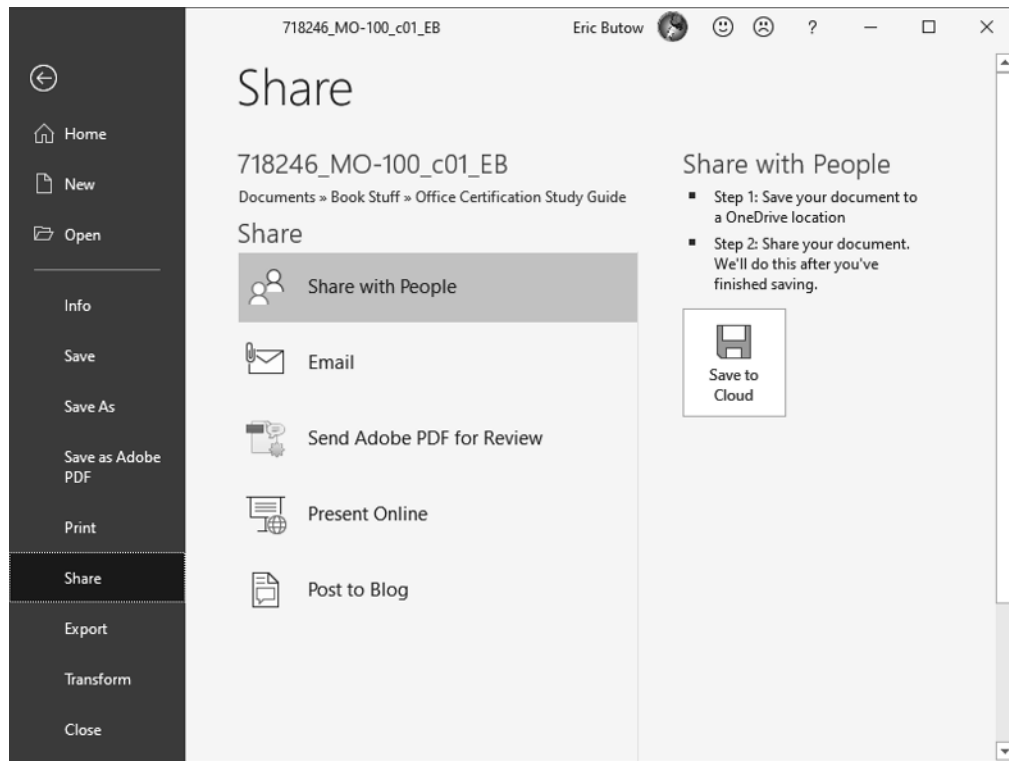
Sharing Documents Electronically

If you're sharing a document with other people and they expect to receive it in electronic form, such as an email attachment, Word gives you five different ways to send a file online directly within Word.

Start by clicking the File menu option. Now click Share in the menu on the left side of the File screen.

Within the Share screen, as shown in Figure 1.18, the Share With People option is selected in the Share menu. This option allows you to share your document to a OneDrive location by clicking the Save To Cloud button.

FIGURE 1.18 Share screen



Here are the other four formats that Word supports to share your documents online:

Email You can send your Word file as an email file attachment in native Word format or as a link to the file in a shared folder on a network. What's more, you can save the file in PDF or XPS format and attach it to an email message. You can even send the file to an online fax service.



If you're scratching your head and wondering what a "fax" is, the word "fax" is short for facsimile. You fax a document by using a device (either a computer or a stand-alone device called a fax machine) to scan the document and then transmit it electronically through telephone lines to your recipient's computer or fax machine. This technology is even older than you think—the first fax machine, called the Electric Printing Telegraph, was invented by Alexander Bain in 1843.

Send Adobe PDF For Review Select this option if you only want to send a PDF file as an email attachment, place it on a shared folder, or share it on [Acrobat.com](https://acrobat.com).

Present Online When you select this option, Word creates a link so that people can read the document on a web page. You need a Microsoft account, which you probably already have, especially if you're using Word as part of Microsoft 365.

Post To Blog Word will create a new blog post from your document if your blog is on an intranet SharePoint server or on a public blog website that uses the WordPress, Telligent Community, or Typepad blog platforms. You need to register your blog account with Word the first time you use this feature.



Real World Scenario

The Case for Sending a Document by Fax

When would you ever use a fax machine? Aren't we in the 21st century? Despite the fact that faxes have mostly been overtaken by email and secure file storage services like Dropbox, you may find in your job that a client in a certain industry requires that you send and receive files through fax. If you work in any of the following industries, don't be surprised if you receive a fax request:

- Health care
- Manufacturing
- Finance
- Government

All these industries have documents with really sensitive information, like medical records, so they require that the documents be sent securely through a fax machine over phone lines or that the sender use secure encryption on online fax services such as eFax, Fax.Plus, and HelloFax.

EXERCISE 1.3**Changing the File Type and Sharing Your Document**

1. Open an existing document.
 2. Save the file as a plain text (*.txt) document.
 3. Close your plain text document, and reopen the Word format document that you opened in step 1.
 4. Change your print orientation to landscape, and then print your document.
 5. Share your document as an email attachment and send the email to someone else. Just be sure to tell the other person in your email message that this is a test document, unless the document is really something that you need to send to that person.
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Inspecting Documents for Issues

If you have any problems with your document, or you just want to take a closer look at it to make sure that other people will (or won't) see the information in your shared document, Word has the tools you need.

I'll start by showing you how you can remove any hidden properties that may be causing problems, such as weird formatting and how to remove any personal information that you don't want to share. I'll also show you how to find and fix issues with document *accessibility* (for people who may have trouble reading your document) and *compatibility* issues with earlier versions of Word.

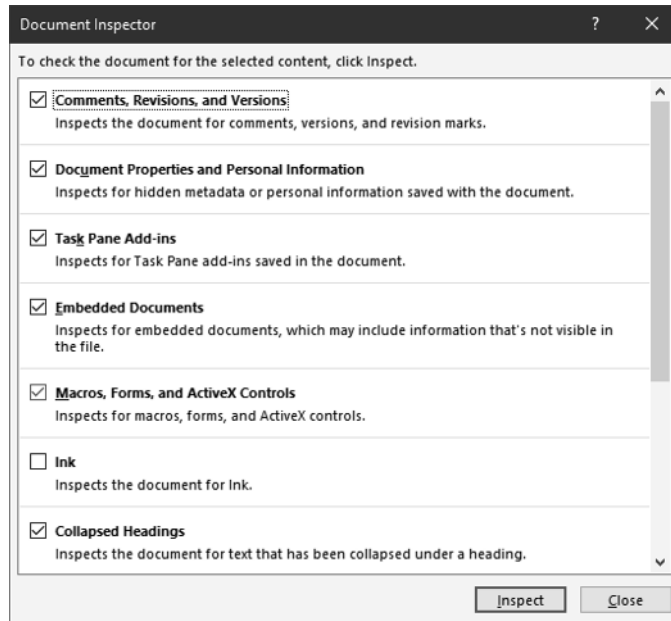
And as with all previous sections in this chapter, this section concludes with an exercise so that you can get a feel for these tools.

Locating and Removing Hidden Properties and Personal Information

Here's where to find properties and personal information and then use the built-in Document Inspector to remove them.

Start by clicking the File menu option. Click Info in the menu bar on the left side of the File window. Now that you're in the Info screen, click the Check For Issues button. Within the drop-down list, click Inspect Document.

Now you see the Document Inspector dialog box, as shown in Figure 1.19. Scroll up and down in the list of content that Windows will inspect.

FIGURE 1.19 Document Inspector dialog box

By default, the following check boxes next to the content category names are checked:

- Comments, Revisions, And Versions
- Document Properties And Personal Information
- Task Pane Add-Ins
- Embedded Documents
- Macros, Forms, And ActiveX Controls
- Collapsed Headings, which is text collapsed under a heading
- Custom XML Data
- Headers, Footers, And Watermarks
- Invisible Content, which is content that has been formatted as such but does not include objects covered by other objects
- Hidden Text

These check boxes mean that the Document Inspector will check content in all those areas. Click Ink, the only clear check box, if you want to check to see if someone has written in the document with a stylus, such as the Microsoft Surface Pen.

When you decide what you want Word to check out, click Inspect. When Word finishes its inspection, you can review all the results within the dialog box.

The results show all content categories that look good by displaying a green check mark to the left of the category name. If Word finds something that you should look at, you see a red exclamation point to the left of the category. Under the category name, Windows lists

everything it found. Remove the offenders from your document by clicking the Remove All button to the right of the category name.

You can reinspect the document as often as you want, until you see all of the categories are okay, by clicking Reinspect. When you're done, click the Close button to return to the Info screen.

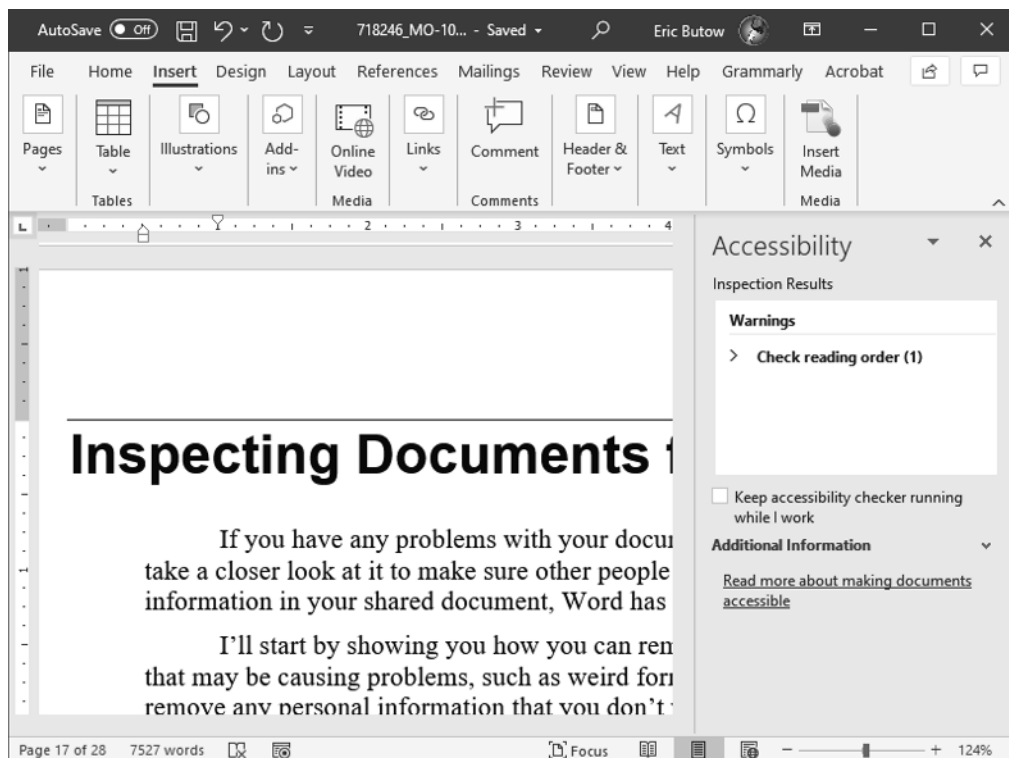
Finding and Fixing Accessibility Issues

If you plan to share your document with other users, Word makes it easy to check your document so that everyone of all abilities can not only read your document but edit it as well. Here's how:

1. Open the Info screen as you did in the previous section.
2. Click the Check For Issues button.
3. Click Check Accessibility in the drop-down menu.

The Accessibility panel appears at the right side of the Word window after Word checks your documents (see Figure 1.20). The panel displays your results in the Inspection Results list.

FIGURE 1.20 Accessibility panel



Click the warning to view each issue Word found. Click on the issue to view additional information and steps to fix the problem under the list. You can close the panel by clicking the Close icon in the upper-right corner of the panel.



You can also open the Accessibility panel in the main document window by clicking the Review menu option and then clicking Check Accessibility in the ribbon.

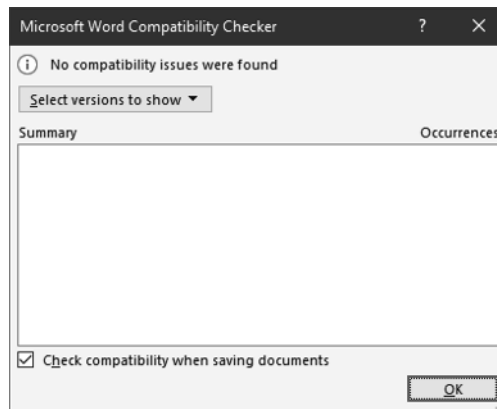
Locating and Correcting Compatibility Issues

If you're going to share your document with others who use older versions of Word, and you're not sure if what you have in Microsoft 365 or Word 2019 will be readable, Microsoft has you covered.

Start by opening the Info screen as you did in the “Locating and Removing Hidden Properties and Personal Information” section earlier in this chapter. Click the Check For Issues button, and then click Check Compatibility in the drop-down menu.

Now you see the Microsoft Word Compatibility Checker dialog box with a list of any issues Word found in the Summary list (see Figure 1.21). The list includes the number of occurrences of each issue. If there are no issues, Word tells you at the top of the dialog box.

FIGURE 1.21 Microsoft Word Compatibility Checker dialog box



You can check for a specific version of Word someone else is using by clicking the Select Versions To Show button to view a drop-down list of Word versions to check compatibility. You can select from the previous three versions: Word 97–2003, Word 2007, and Word 2010.

What's more, you may find it unlikely that you'll have to open this feature from the Info screen because Word automatically checks compatibility with all three of those earlier versions. If Word finds something, the dialog box opens automatically.

If you don't want to check compatibility when you save a document so that you can check it manually, clear the Check Compatibility When Saving Documents check box.

Unfortunately, you have to remember what the problems are because you can't edit the document while the dialog box is open. Close the dialog box by clicking OK.

EXERCISE 1.4

Checking Out Your Document

1. Open an existing document.
 2. Run the Document Inspector.
 3. If the Document Inspector finds anything, click the Remove All button in that category.
 4. When you're done inspecting your document, click the Close button.
 5. Check your document for accessibility issues and make any changes that Word recommends.
 6. Check your document for compatibility issues with previous versions of Word.
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Summary

This chapter started by exploring the various ways you can navigate around the document to find text that you're looking for. You also learned how to add a link within a document to another place or object in your document. Then you learned how to hide formatting symbols in your document, hide text within your document, and show the hidden text again.

After I discussed how to move around your document, we moved on to learning how to set up your document so that it looks the way you want. Word gives you the power to change many document features, including the look and feel of the page; text setting styles you can apply to a paragraph or selected text; headers and footers; and page background elements, including the page color.

When you finish your document and save it, you can save it in one of 16 different formats in addition to the DOCX format that's native to Word 365 and Word 2019. You can change print settings in Word so that your printed document looks the way you want, and you can take advantage of Word's built-in sharing tools to send your document to others in various formats.

Finally, you learned about the built-in tools that Word gives you to inspect your document before you share it with others. These tools ensure that you don't share any sensitive information, that people of all abilities can read your document, and that people who have older versions of Word can read your document.

Key Terms

accessibility	Inspect
background	Link
compatibility	print
footers	properties
formatting	search
headers	sharing
hidden text	styles

Exam Essentials

Know how to find and link to text and objects as well as replace text in a document. Understand how to search for text from the Word title bar, the Navigation pane, and the Find And Replace dialog box. Know how to add a link within the document to a different location in the document. You also need to know how to view and hide Word formatting symbols on the page.

Understand how to set up document pages. Know how to change document page settings from within the Layout tab ribbon. Be able to apply a design template and page background elements.

Know how to apply a style. Understand how to open the Styles pane and apply one of the built-in styles to a paragraph or selected text in your document.

Know how to add a header and footer. Understand how to add a header and footer as well as how to select and apply a prebuilt header and footer style.

Understand how to save a document in different formats. Know when you need to save a document in a different format and what happens after you save the document in a new format.

Be able to change document and print properties. Understand how to view all of your document properties before you share your document, as well as your printing properties, before you print your document.

Understand how to send documents electronically within Word. You need to know how to use the built-in sharing tools to share your documents electronically in email and on the web.

Understand how to inspect and fix document issues. Know how to use the Word Document Inspector to find any potential problems with your documents that you need to fix, including accessibility for all devices and readability for users with older versions of Word.

Review Questions

1. How can you replace text in multiple places within a document most quickly?
 - A. Search for the text in the Word title bar and then change each one.
 - B. Open the Navigation pane, search for the text, click on each result in the results list, and then change the text for each instance.
 - C. Open the Find And Replace dialog box, type the text to find and replace in the Find and Replace fields, and then click the Replace All button.
 - D. Scroll down through the document and change any instance of the word that you see.
2. Adding lighter background text to the background of a document is called what?
 - A. Header
 - B. Watermark
 - C. Footer
 - D. Style
3. What is the area above the text of a document called?
 - A. Footer
 - B. Top
 - C. Margin
 - D. Header
4. Which menu option do you click to inspect documents?
 - A. Home
 - B. Review
 - C. File
 - D. Help
5. How do you know a style applies to a paragraph?
 - A. The paragraph marker appears to the right of the style name within the Styles pane.
 - B. The name of the style
 - C. The lowercase “a” appears to the right of the style name in the Styles pane.
 - D. The Navigation pane shows that information.
6. What is the difference between a style and a theme?
 - A. They’re the same thing.
 - B. Styles are in the Home ribbon and themes are in the Design ribbon.
 - C. The lowercase “a” appears to the right of the style name in the Styles pane.
 - D. A style is a collection of formatting settings, and a theme is a collection of styles.

7. Within the File screen, what menu option do you click on the left side of the screen to send a document to someone else?
 - A. Info
 - B. Share
 - C. Save
 - D. Export
8. How do you jump to a specific page in a document?
 - A. Scroll down to that page.
 - B. Search for text you know is on that page within the Navigation pane.
 - C. Click the down arrow to the right of the Find icon in the Home ribbon and then click Go To.
 - D. Type the page number in the Search box in the Word title bar.
9. How do you find out if a document may be hard for people of different abilities to read?
 - A. Send the document to other people and ask if they have any trouble reading it.
 - B. Search for accessibility in the Search box within the Word title bar.
 - C. Save the document in a different format.
 - D. Use the Accessibility Checker.
10. What does the Compatibility Checker answer about your document?
 - A. If the document is compatible with the web
 - B. If the document can be read in earlier versions of Word
 - C. If the document can be exported to other file formats
 - D. If you need to use a different word processing program