

WORD DOCUMENT SHARING

OFFICE 97

Word Document Sharing covers Word's features that are used when sharing documents with others and will assist attendees in preparing for Microsoft Word expert certification. The workshop will introduce you to workgroup editing, online forms and more.

Workgroup Editing

The Workgroup functions of Word allow a group of users to share a document, track the changes that have been made, comment on sections, route the document, and even create documents with multiple versions.

Tracking Changes

Change tracking is based on the Reviewing Toolbar. Go to View/Toolbars/Reviewing to see the following toolbar:



The buttons are defined as follows (from left):

- Add Comment
- Edit Comment
- Previous Comment
- Next Comment
- Delete Comment
- Track Changes
- Previous Change
- Next Change
- Accept Change
- Delete Change
- Highlight
- Create Outlook Task
- Save Version
- Send to Mail recipient

To use the toolbar to track the changes you make to a document,

- 1 Open the document you want to revise.
- 2 On the Reviewing toolbar, click Track Changes.
- 3 Make the changes you want by inserting, deleting, or moving text or graphics. You can also change any formatting. Word uses revision marks to show the changes.

Revision Marks are markings showing what changes have been made to a document. Once Track Changes is turned on, any text inserted, deleted, or replaced will be noted with Revision Marks. Revision Marks look like this:

The Senator ~~waffled on~~ reconsidered the topic of Social Security benefits.

Revisions are also color-coded, for multiple reviewers.

****Note** – The reviewer name and initials are derived from Tools/Options/User Information. If your fields have not been edited, quite likely they will say “Grinnell

College” for a name. Edit your User Info before reviewing to have changes attributed to yourself.

Using Comments

Comments are a way to add your input about a document, or suggest changes, without adding information to the file. They show up as highlighted text, with a comment code (that looks like this: **[mdw1]**), using your initials and a number to identify the commentor.

To add a comment:

1. Highlight the word or phrase you wish to comment on. (If nothing is selected, it will highlight the word closest to the insertion point)
2. Type your comment beside the comment number in the comment box that appears at the bottom of the screen.
3. Click Close when finished.

Routing of Documents

Routing a document consists of sending it to a list of people, and each one reading it and then sending it on. This can only be done easily if the users are using Microsoft Outlook for their email.

- 1 Open the document you want to route.
- 2 On the File menu, point to Send To, and then click Routing Recipient.
- 3 To select recipients to route the document to, click Address.
- 4 In the Type name or select from list box, type a recipient’s name, and then click To. Once you’ve entered the last recipient name in the To box, click OK.

You can select a group alias as the recipient. However, all members of the group alias are considered one recipient. To route the document to members of a group alias one after another, route it to the individual members, not to the entire alias. You can change the order in which recipients will receive the routed document by changing the order of recipient names in the list. Select the name of the recipient you want to move up or down in the list, and then click the appropriate arrow.

- 5 Select other routing options you want. Return when done brings the document back to you when all have seen it. Track Status will email you as each person forwards the document on. To route the document, click Route.

To close the dialog box without routing the document, click Add Slip. To route the document at a later time, open the document, click Send To on the File menu, and then click Next Routing Recipient.

****Note** - When you route a document, the document is sent as an attachment in an e-mail message.

Document Versions

Using Versions in a document allows you to save the changes that were made along the way, and revert back to a previous version if the changes made were not approved.

With the new versioning feature in Word, you can record “snapshots” of the changes made to a document by saving multiple versions in the same document. You save disk space because Word saves only the differences between versions, not an entire copy of each version. After you’ve saved versions of a document, you can go back and review, open, print, and delete earlier versions.

To Save a Version of a Document

- 1 On the File menu, click Versions.
- 2 Click Save Now.
- 3 In the Comments on version box, type descriptive information about the version you’re saving.

****Note** - Because you are archiving document versions, you cannot go back and modify a saved version of a document. Before you can modify an earlier version, you must open that version and use the Save As command to save it as a separate file (see below, “Saving a Version as a Separate File”).

To set up Versioning to automatically save a document using versions, click the Automatically save a version on close checkbox on the Versions dialog box.

To Revert to a Previous Version

- 1 On the File menu, click Versions.
- 2 Click the version of the document you want to open.
- 3 Click Open.

This will open both the current and selected document in two tiled windows within Word. You can then make comparisons and decide which version is accepted.

Saving a Version as a Separate File

If you wish to revert to a previous version of a document, you will need to save it as a separate file, as only the differences between the versions has been saved. To do this:

- 1 On the File menu, click Versions.
- 2 Click the version of the document you want to save as a separate file.
- 3 Click Open.
- 4 On the File menu, click Save As.
- 5 In the File name box, enter a name, and then click Save.

Using Macros

You can use macros to automate repetitive tasks in Word. Macros can be designed in different ways, the easiest for beginning macro users is to Record the macro. You complete the task you would like to automate, and record the actions for use later.

To Record a Macro

- 1 On the Tools menu, point to Macro, and then click Record New Macro.
- 2 In the Macro name box, type a name for the macro.
- 3 In the Store macro in box, click the template or document in which you want to store the macro.

- 4 In the Description box, type a description for the macro.
- 5 If you don't want to assign the macro to a toolbar, a menu, or shortcut keys, click OK to begin recording the macro.
- 6 Perform the actions you want to include in your macro.

Note: The macro recorder cannot record mouse actions in a document window. You must use the keyboard when recording such actions as moving the insertion point or selecting, copying, or moving text. However, you can use the mouse to click commands and options when you're recording a macro.
- 7 To stop recording your macro, click Stop Recording .

Running Your Macro

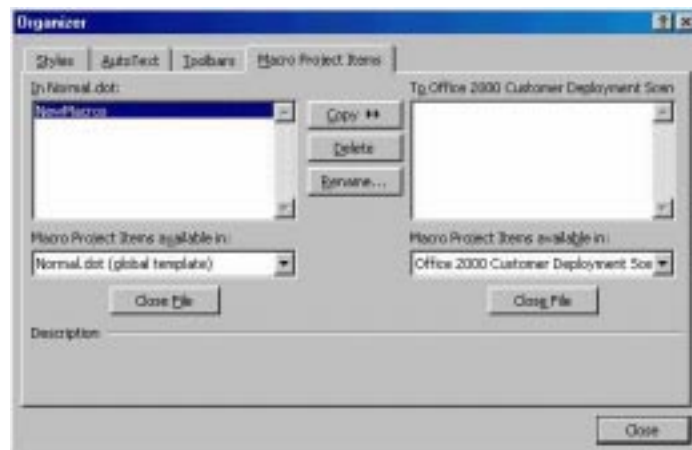
Once the Macro is created, you need only to access it from the menu to have it run. Certain macros might need the insertion point placed in a location, or a selection of text highlighted. Be sure you have taken care of this before running the Macro. To execute the commands:

1. Select Tools/Macro/Macros
2. Choose your macro from the list of available macros.
3. Click Run

The macro then executes the commands in order, as they were recorded.

Manipulating Macros

You can save a macro as either attached to a single document or template, or as part of the Normal.dot, or the default document template. Depending on how the macro will be used, you will want to dictate where it is stored.



- Storing a macro in Normal.dot will make it available to all new files created from that point forward. Normal.dot is the default template for new documents.
- Storing a macro in a specific file or template will make it available to only that document, or those based on that template. This would be useful if you wished to use a macro that ran automatically on opening or closing of a file.

Managing Files

When a file will be passed around through many hands, you may wish to control how much the people can change it. You can do this with document protection. To protect a file so that others can make comments, but not change the original document:

1. In the document you would like protected, select Tools/Protect Document...
2. In the resulting dialog box:



Select Comments. This will allow others to make only comments.

3. Click OK
4. Verify your password.

In the File/Properties dialog box, in addition to being able to designate the Title, Subject, Author, etc., you can add comments to the document. This may be useful for a heavily routed document, or to keep the location of the references used to create the file, or even list associated files. It is a free-form text box, able to hold whatever you desire.