CHAPTER 14 **PROTECTING DOCUMENTS**

INFOCUS

If you distribute or transmit important documents regularly to others for review, for example, you should consider *protecting* them. To protect a document means to apply settings that restrict or prevent other users from formatting or editing your document, or sections of a document. Microsoft Word 2010 provides several functions for protecting your documents.

In this session you will:

✓ gain an understanding of options for document protection
✓ learn how to make a document read-only
✓ learn how to open and work with a read-only document
✓ learn how to restrict the formatting in a document
✓ learn how to work with formatting restrictions
✓ learn how to restrict editing in a document
✓ learn how to specify exceptions to editing and formatting restrictions
✓ learn how to remove document protection.

UNDERSTANDING DOCUMENT PROTECTION

To **protect** a document means to restrict or prevent other users from editing your important work. When a document is protected other users can **read** the document but cannot make changes to the document unless they have been given permission. If you want to make sure that your work cannot be edited or changed in any way, then document protection might be just the thing!

How Does Document Protection Work?

There are several ways to protect your document. You can save a document as **read-only recommended**. When users open a read-only document, they will receive a message asking how they would like to open that document. Users can open the document as read-only, and if they make changes to the document they will need to save it with a different file name (or in a different location), otherwise they can simply open the document to view. Or, users can open and work with the document as normal.

You can also apply **password protection** to a document. There are several ways to do this, such as clicking on **Tools** in the **Save A**s dialog box and entering a password.

You can also work with the various document protection controls on the **Restrict Formatting and Editing Task Pane**.

The Restrict Formatting and Editing Task Pane

The **Restrict Formatting and Editing** task pane (see picture) allows you to apply:

1. **Formatting Restrictions**

   When you enforce this type of document protection, you will prevent your users from being able to apply any type of manual formatting (such as applying bold or italics, or changing the text font). Users can also be prevented from modifying the styles in any way.

2. **Editing Restrictions**

   Allows you to specify the type of editing that can occur, what part of the document can be edited, as well as who can make changes to the document. For example, using the **Editing restrictions** option, you can:

   - Make particular parts of a document (or the entire document) read-only. You can also grant permission for specific users to change the unrestricted parts of a document.
   - Allow users to edit a document with tracked changes turned on. They can also insert comments into the document with this option.
   - Allow users to insert comments into a document.
   - Allow users to fill in a form in a document.

3. **Password Protection**

   Assign a password if you choose when you start enforcing the protection. Assigning a password at this point will ensure that only users who know the password can remove the protection that you have set for the document.

   Conversely, if you choose not to use a password, be aware that all users can very easily change or remove the document protection as long as they know how to display the **Restrict Formatting and Editing** task pane.

MAKING A DOCUMENT READ-ONLY

If you use a particular document or template as a basis for creating other documents, you can ensure that you or others don't make changes to the document by making the document a *read-only recommended* document. When you save a document as read-only, users who open that document will receive a message about how they want to open and work with the document.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W878 Protecting Documents_1.docx...

1   Click on the *File* tab, then click on Save As to open the *Save As* dialog box

2   Type **My Read Only File** in *File name*, then navigate to the course files folder

3   Click on **[Tools]** and select **General Options** to open the *General Options* dialog box

  [Tools] is located to the left of [Save] in the bottom right corner of the Save As dialog box...

4   Click on *Read-only recommended* until it appears with a tick, then click on **[OK]** and on **[Save]**

  This will save the document as read-only recommended. There really is no change to the document, and the only way to tell whether the document is read-only is to close and then re-open the document…

5   Close the document
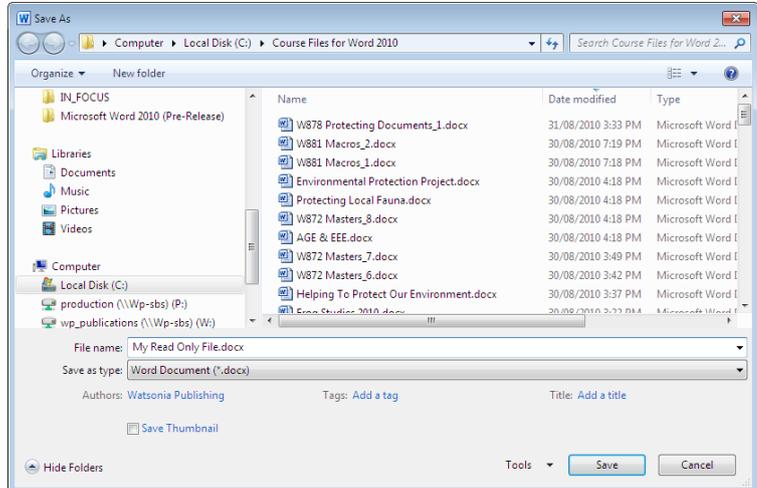
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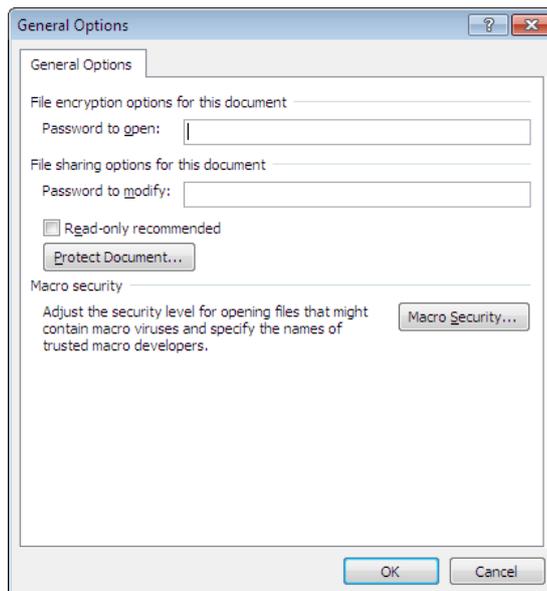
For Your Reference…

To *make* a *document read-only*:

1. Click on the *File* tab, then click on *Save As*
2. Type the *File name*
3. Click on **[Tools]** and select **General Options**
4. Tick *Read-only recommended*, click on **[OK]** and then click on **[Save]**

Handy to Know…

- You can make a document *read-only* in the *Restrict Formatting and Editing* task pane. To do this, click on the *Review* tab, click on *Restrict Editing* and click on *Allow only this type of editing in the document* under *Editing restrictions* in the task pane, then click on **[Yes, Start Enforcing Protection]**.

WORKING WITH A READ-ONLY DOCUMENT

When you attempt to open a *read-only recommended* document, you are given a choice of how to open the document. The default option is to open it as a read-only document. In this situation, if you change the document you must save the changes to a new document. Or, you can open the document as normal where you can save any changes to the original document.

Try This Yourself:

Before starting this exercise make sure Word is open...

1 Click on the *File* tab, then click on *Open* to open the *Open* dialog box, then navigate to the course files folder

2 Locate and double-click on *W878 Protecting Documents_2.docx*

A message box will be displayed asking how you want to open the document…

3 Click on **[Yes]** to open the document in read-only mode

[Read-Only] will appear after the file name in the title bar. Now let's edit the document...

4 Double-click on the heading *Introduction* and press Del

Let's try saving the change...

5 Click on the *File* tab, then click on *Save As* to open the *Save As* dialog box

6 Click on **[Save]**

A message box will appear telling you that this file is read-only, so any changes must be saved to a new document…

7 Click on **[OK]** and then on **[Cancel]**, and then close the file without saving the change
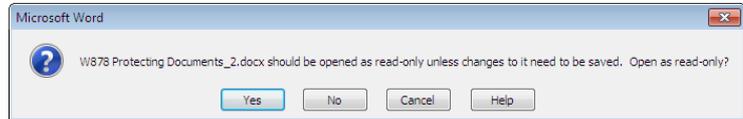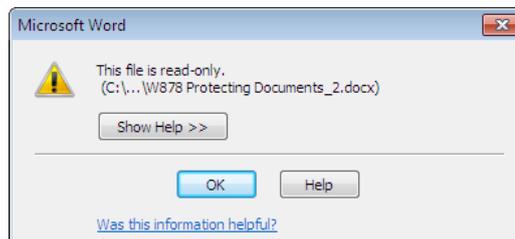

Recycling Water for Drinking Purposes

The drought and widespread water shortages have generated increasing interest in using recycled water to augment water supplies for irrigation, industrial and drinking uses. This has raised the question of health risks, which are clearly of concern to many members of the public.

The industry manages the public health risks associated with providing safe drinking water by the application of the *Safe Drinking Water Quality Management Framework* in the *International Health & Medical Research Council* (IHMRC) guidelines for safe drinking water. This risk management approach should also be applied to the risks associated with recycled water.

The Alpheius Global Enterprises Research Centre for Water Quality and Treatment has the experience and skills to assist the IHMRC in developing a similar framework for managing and monitoring the risks associated with delivering recycled water that is safe for the purpose for which it is intended. Recycled water can be used in a number of ways as discussed below.

For Your Reference…

To *open* a *read-only document*:

1. Click on the *File* tab, then click on *Open*
2. Navigate to and double-click on the desired file
3. Click on **[Yes]** to open the document as a read-only document

Handy to Know…

• When you save a read-only recommended document as a new document, unless you remove the tick from *Read-only recommended* in the *General Options* (via **[Tools]** on the *Save As* dialog box) the new document will also be saved as a read-only recommended document.

RESTRICTING FORMATTING

When you open a document, by default all styles are available for use and can be modified as required. But if you have a document that you want to distribute to others – say, for review purposes − and you don't want them to change the look of your document, you can restrict, and even prevent totally, their ability to make any formatting changes to the document.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W878 Protecting Documents_3.docx...

1. Click on the **Review** tab, then click on **Restrict Editing** 🔲 in the **Protect** group and select **Restrict Formatting and Editing** to open the **Restrict Formatting and Editing** task pane

2. Click in the check box for **Limit formatting to a selection of styles**, then click on **Settings** to open the **Formatting Restrictions** dialog box

3. Click on **[None]**, then scroll down and click on the check boxes for **Heading 1**, **Normal (Web)** and **Title**, and then click on **[OK]**

   A message box will appear…

4. Click on **[Yes]** to close the message box, then click on **[Yes, Start Enforcing Protection]** – the **Start Enforcing Protection** dialog box will appear

5. Click on **[OK]** to close the box without specifying a password, then save the document

   Now users can only use the selected styles to format this document

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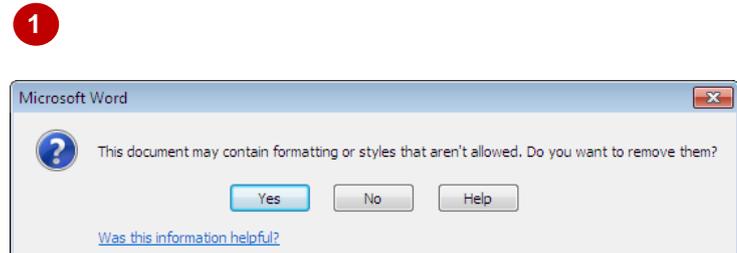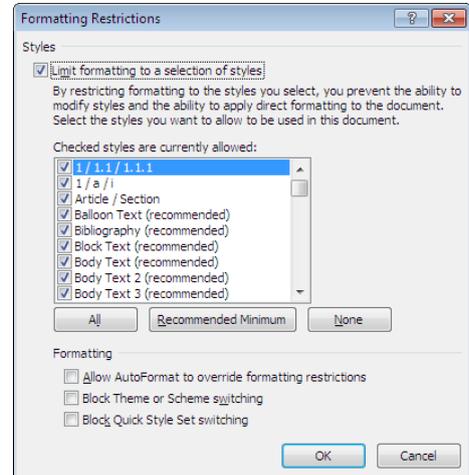
For Your Reference…

To *restrict formatting* in a *document*:

1. Click on *Restrict Editing* 🔲 on the *Review* tab and select **Restrict Formatting and Editing**
2. Tick *Limit formatting to a selection of styles*, click on *Settings* and select the styles, then **[Yes, Start Enforcing Protection]**

Handy to Know…

- When you restrict formatting to selected styles, you prevent users from being able to modify the selected styles and from being able to apply any direct formatting (such as bold and italics) to the document.

WORKING WITH FORMATTING RESTRICTIONS

If you open a document that has formatting restrictions applied, you can only change the look of the document by applying the allo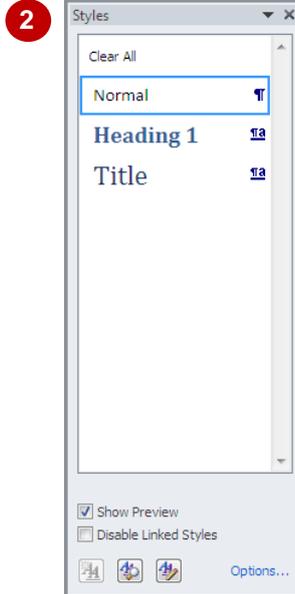wed (selected) styles to the text. You will not even be able to apply any kind of text formatting, such as changing the text colour or font. And if no styles have been made available in a document, you cannot change the look of the document at all.

Try This Yourself:

Same File *Continue using the previous file with this exercise, or open the file W878 Protecting Documents_4.docx...*

1 Ensure that the **Restrict Formatting and Editing** task pane is displayed

2 Click on **Available styles** on the task pane to open the **Styles** dialog box

Only four styles are available for use in this document...

3 Click in the title text **Recycling Water For Drinking Purposes**, then click on **Title** in the **Styles** dialog box to apply this style

4 Click in the text **Introduction** and then click on **Heading 1** in the **Styles** dialog box to apply this style

5 Repeat step **4** to apply the **Heading 1** style to the remaining five subheadings

Let's try to format some text...

6 Select the text **Safe Drinking Water Quality Management Framework** in the second paragraph, then click on the **Home** tab

None of the formatting commands are available…

7 Save and close the document

2

Styles	▼ ×
Clear All	
Normal	¶
Heading 1	¶a
Title	¶a

☑ Show Preview
☐ Disable Linked Styles

Options…

3

Recycling Water for Drinking Purposes

Introduction

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The drought and widespread water shortages have generated increasing interest in using recycled water to augment water supplies for irrigation, industrial and drinking uses. This has raised the question of health risks, which are clearly of concern to many members of the public.

4

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The industry manages the public health risks associated with providing safe drinking water by the application of the Safe Drinking Water Quality Management Framework in the International Health & Medical Research Council (IHMRC) guidelines for safe drinking water. This risk management approach should also be applied to the risks associated with recycled water.

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For Your Reference…

To **work with formatting restrictions**:

1. Open the **Restrict Formatting and Editing** task pane
2. Click on **Available styles**
3. Click in the paragraph to be formatted and then click on the desired styles

Handy to Know…

- The styles that are available for the document will also appear in the **Styles** gallery on the **Home** tab.
- If you right-click on selected text in this document, you will notice that the **Font**, **Paragraph**, **Bullets** and **Numbering** menu options are not available.

RESTRICTING EDITING

You can *restrict editing* of a document by selecting parts of a document that can be edited, such as blocks of text, particular headings, sentences or even words. For example, you can specify the areas that can be edited and restrict other areas, you can allow editing with all changes tracked, you can allow only comments to be inserted into the document, and so on.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W878 Protecting Documents_5.docx...

1. Ensure that the *Restrict Formatting and Editing* task pane is displayed

2. Select the three paragraphs of text below *Introduction*, then click in the check box for *Allow only this type of editing in the document*

3. Ensure that *No changes (Read only)* is selected in *2. Editing restrictions*, click in the check box for *Everyone*, then click away from the text to deselect it

   The text will be highlighted in grey and sits between square brackets...

4. Repeat steps *2* and *3* for the next three paragraphs, as shown

5. Click on the check box for *Everyone*, then click on [Yes, Start Enforcing Protection]

6. Click on [OK] to close the dialog box without setting a password

   You can now only edit the yellow highlighted text...

7. Double-click on *Introduction* and press Del

   Nothing will happen, but all other areas of the document are editable…

8. Save and close the document

Introduction

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The Alpheius Global Enterprises Research Centre for Water Quality and Treatment has the experience and skills to assist the IHMRC in developing a similar framework for managing and monitoring the risks associated with delivering recycled water that is safe for the purpose for which it is intended. Recycled water can be used in a number of ways as discussed below.

3

Recycling for Non-drinking Purposes

Recycling for irrigation, watering parks and gardens and industrial uses carries the lowest public health risk and is the most acceptable option for augmenting water supplies. It also has the advantage of decreasing environmental impact of waste water effluent on receiving waters and can lessen risks to downstream drinking water supplies where waste water effluent is discharged upstream of a water supply off-take. But, the high cost of transporting the recycled water to where it is needed may make this approach uneconomical in some circumstances.

Recycling for Drinking Water

The most significant short term risk is from potentially pathogenic micro-organisms. Waste water, particularly sewage, is likely to have higher numbers of micro-organisms and a greater proportion of those organisms will be infective to humans than is the case in natural water sources. Some chemicals will also be present in waste water. Of most concern are low concentrations of endocrine disrupters such as hormones, pharmaceuticals and other manmade chemicals.

Industrial waste water is likely to introduce other chemicals of concern such as heavy metals and solvents.

4

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6

For Your Reference…

To *restrict editing* in a *document*:

1. Open the *Restrict Formatting and Editing* task pane
2. Select the text, tick *Allow only this type of editing in the document*, then select the desired option in *2. Editing restrictions*
3. Click on [Yes, Start Enforcing Protection]

Handy to Know…

- If you choose not to apply a password when enforcing protection, all users opening this document can change your restrictions.

- If the text is not highlighted in yellow at step *5*, click in the check box for *Highlight the regions I can edit* in the *Restrict Formatting and Editing* task pane.

MAKING EXCEPTIONS

By default, the group name *Everyone* is listed in *Exceptions* under *Editing restrictions*. This means just as it says: everyone can carry out the editing restrictions that you set for the document.

But, if you want only specific users to be able to edit the allowable regions in the document, you can specify them by first adding them to the *Exceptions* list and then selecting them.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W878 Protecting Documents_6.docx...You must also be logged onto a Windows domain network and know the User ID of another person on this network...

1. Ensure that the *Restrict Formatting and Editing* task pane is displayed, then select the three text paragraphs under *Introduction*

2. Click on *Allow only this type of editing in this document* and then ensure that *No changes (Read only)* is selected

3. Click on *More users* under *Exceptions* to open the *Add Users* dialog box

4. Type a valid *User ID* in *user name*,

   In the example shown, the string used is DOMAIN_NAME\UserID…

5. Click on **[OK]**

   The user will be added to the box under Individuals…

6. Click on the new user under *Individuals*, click on **[Yes, Start Enforcing Protection]**, then click on **[OK]** to close the *Start Enforcing Protection* dialog box without setting a password

7. Save and close the document
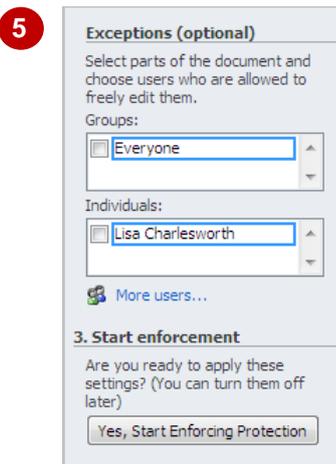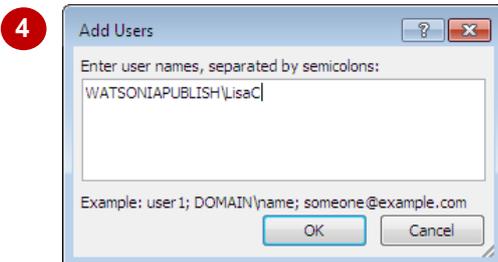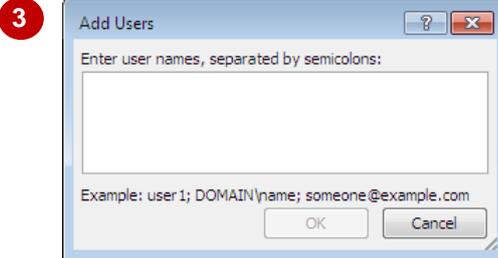
For Your Reference…
To *make exceptions to editing restrictions*:
1. Open the *Restrict Formatting and Editing* task pane
2. Select the text to allow, tick *Allow only this type of editing in this document*, click on *More users*, and add users as desired
3. Click on **[Yes, Start Enforcing Protection]**

Handy to Know…
- In this exercise, we entered the *User Id* using the format *Domain\user name*. To identify the correct domain name and User ID on your network for the person/s you want to allow document editing, speak to your network or systems administrator if you're not sure.

STOPPING DOCUMENT PROTECTION

If you want to stop protecting a document – perhaps you have received your document back from the reviewer and you are ready to edit it – you can do this very simply via the ***Restrict***
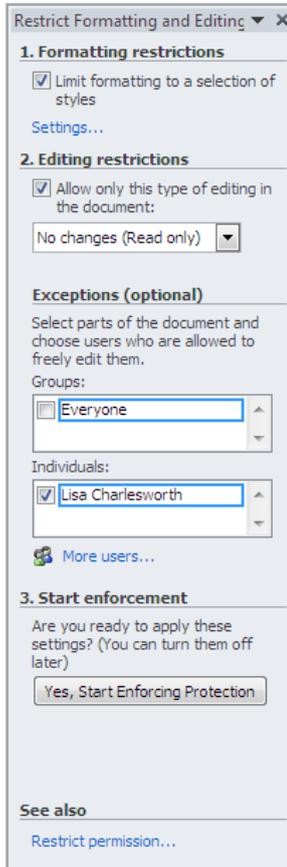
Formatting and Editing task pane. In fact this process is so easy that if a password wasn't set when the data protection was initially applied to the document, anyone can stop the protection.

Try This Yourself:

Open File

*Before starting this exercise you MUST open the file W878 Protecting Documents_7.docx...*

1 Ensure that the ***Restrict Formatting and Editing*** task pane is displayed

Currently, this document has both editing and formatting restrictions and exceptions applied...

2 Click on **[Stop Protection]** – now you can see the protection that was originally applied

3 Click in the check box for ***Limit formatting to a selection of styles*** to remove the tick

4 Click in the check box for ***Allow only this type of editing in the document*** to remove the tick

A message box will appear asking whether or not you want to ignore the editing restriction exceptions that were previously set...

5 Click on **[Yes]** to remove the exceptions

All protection will now be removed from this document...

6 Save and close the document
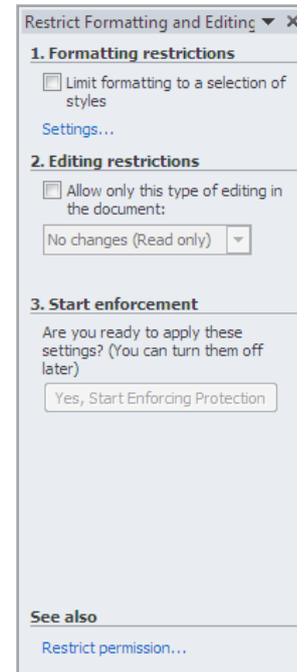
For Your Reference…

To ***stop document protection***:

1. Open the ***Restrict Formatting and Editing*** task pane
2. Click on **[Stop Protection]**
3. Remove the ticks from the check boxes
4. If a message box appears, click on **[Yes]**

Handy to Know…

- If you used a password when setting the original document protection using the ***Restrict Formatting and Editing*** task pane, you will need to type the password before you can stop the protection.

Notes: