Directions to Unprotect, Protect, and Save as a template in Microsoft® Word 2010

ADD PROTECTION TO A DOCUMENT

1. **<u>Before you protect the document</u>, make sure the cursor is on the first page, on the blank line above the first fill-in line [Insert the Name of the PWS]**

2. On the **Review** tab, in the **Protect** group, click **Restrict Editing**.

2. In the **Editing restrictions** area, select the **Allow only this type of editing in the document** check box.

3. In the list of editing restrictions, click **Filling in Forms**.

6. Under **Start enforcement**, click **Yes, Start Enforcing Protection**.

7. Either click **OK** or set a Password:

   Password Information - do one of the following:

   - To assign a password to the document so that users who know the password can remove the protection, type a password in the Enter new password (optional) box, and then confirm the password.
   - Note You must use this option if you intend to post the document so that multiple people can work on it at the same time.
   - Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better. For more information, see Help protect your personal information with strong passwords.
   - It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.
   - To encrypt the document so that only authenticated owners of the document can remove the protection, click User authentication.
   - Note Encrypting the document prevents authoring by more than one person at the same time.
   - For more information about user authentication, see Information Rights Management in Office 2010.
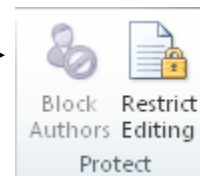
UNLOCK A PROTECTED DOCUMENT

To remove all protection from a document, you might need to know the password that was applied to the document. Or you might have to be listed as an authenticated owner for the document.

If you are an authenticated owner of the document, or if you know the password for removing document protection, do the following:

1. On the **Review** tab, in the **Protect** group, click **Restrict Editing**.

2. In the **Restrict Formatting and Editing** task pane, click **Stop Protection**.
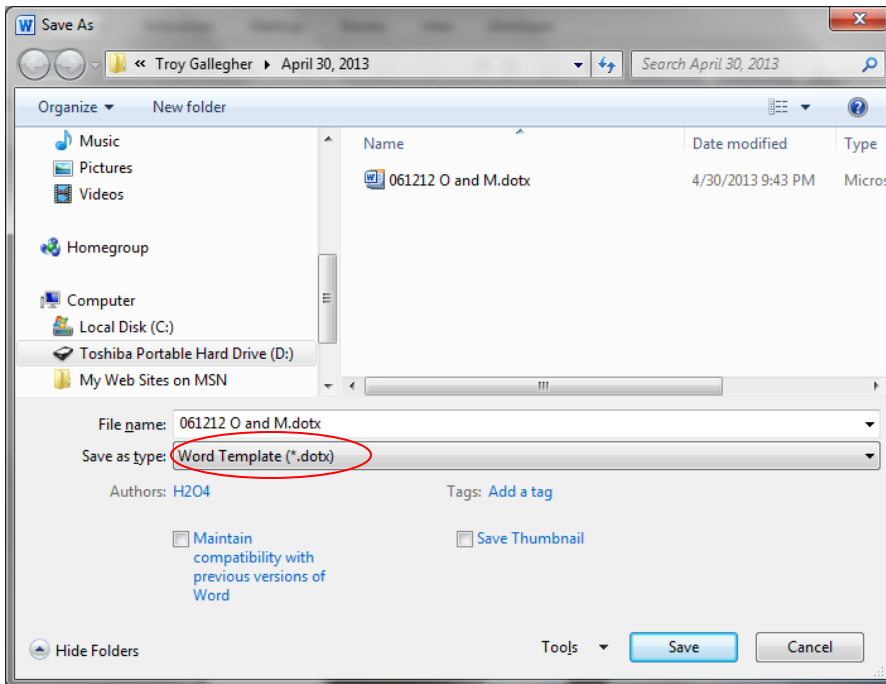
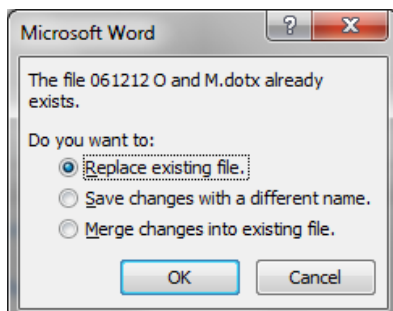3. If you are prompted to provide a password, type the password.

SAVE THE DOCUMENT AS A TEMPLATE AFTER YOU PROTECT THE DOCUMENT

A protected document (locked) allows the user to use the TAB key to go from field to field and utilize the pull down lists. If you unlock the protected document to make changes, you need to protect (lock) the document again and then make it a template. Making the document a template allows the user to save the document without overwriting an existing O&M document and the document footer will automatically fill in when the user enters the System Name and PWS No as the filename. The directions to make the document a template are listed below.

1. Click File

2. Select Save As

3. Save As Type → Select Word Template (see example below)

4. Click the Save button

5. If you are prompted to replace the existing document, click the Yes button (see example below)

6. If the following dialog box appears, click the OK button.

Microsoft Word

You are about to save your document to one of the new file formats. This action will allow you to use all the new features in Word, but may cause changes in the layout of the document.

Click OK to continue, or click Cancel and select the "Maintain compatibility with previous versions of Word" checkbox to preserve the layout of your document.

☐ Do not ask me again

Tell Me More...   OK   Cancel