MICROSOFT EXCEL

X

Inspecting & Protecting Workbooks

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3 Introduction

 Before sharing a workbook, you'll want to make sure it doesn't include any spelling errors or information you want to keep private. Fortunately, Excel includes several tools to help finalize and protect your workbook, including Document Inspector and the Protect Workbook feature.

Document Inspector

Whenever you create or edit a workbook, certain **personal information** may be added to the file automatically. You can use Document Inspector to remove this information before sharing a workbook with others.

Because some changes may be permanent, it's a good idea to save an additional copy of your workbook before using the Document Inspector to remove information.

- 1. Click the File tab to access Backstage view.
- From the Info pane, click Check for Issues, then select Inspect Document from the drop-down menu.



3. You may be prompted to save your file before running **Document Inspector**.

Yes 📐



Microsoft Excel

Before you use Document Inspector...

Make sure you save your changes because the Document Inspector might remove data that can't be restored later. Do you want to save your file now?

No



Docu	ment Inspector	?	×
Fo che	eck the document for the selected content, click Inspect.		
	Comments and Annotations Inspects the document for comments and ink annotations.		^
	Document Properties and Personal Information Inspects for hidden metadata or personal information saved with the document.		
	Data Model Inspects Data Model for embedded data that may not be visible on the sheets.		
	Content Add-ins Inspects for Content add-ins saved in the document body.		
	Task Pane Add-ins Inspects for Task Pane add-ins saved in the document.		
	PivotTables, PivotCharts, Cube Formulas, Slicers, and Timelines Inspects for PivotTables, PivotCharts, cube formulas, slicers, and timelines, which m include data that's not visible on the sheets.	ау	
	Embedded Documents Inspects for embedded documents, which may include information that's not visib the file	le in	~

Inspect

Close

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5. The **inspection results** will appear. In our example, we can see that our workbook contains comments and some personal information, so we'll click **Remove All** on both items to remove this information from the workbook.

Docu	nent Inspector	?	×
Reviev	v the inspection results.		
ł	Comments and Annotations The following items were found: * Comments	Remove All	^
ļ	Document Properties and Personal Information The following document information was found: * Document properties * Absolute path to the workbook	Remove All	
0	Data Model No embedded data found in the Data Model.		
0	Content Add-ins We did not find any Content add-ins.		
Ø	Task Pane Add-ins We did not find any Task Pane add-ins.		
0	PivotTables, PivotCharts, Cube Formulas, Slicers, and Timelines No PivotTables, PivotCharts, cube formulas, slicers, or timelines were found.		
A N	ote: Some changes cannot be undone.		~
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6. When you're done, click **Close**.

Document Inspector ?				
Review	w the inspection results.			
0	Comments and Annotations All items were successfully removed.		^	
0	Document Properties and Personal Information Document properties and personal information were successfully removed.			
0	Data Model No embedded data found in the Data Model.			
0	Content Add-ins We did not find any Content add-ins.			
0	Task Pane Add-ins We did not find any Task Pane add-ins.			
0	PivotTables, PivotCharts, Cube Formulas, Slicers, and Timelines No PivotTables, PivotCharts, cube formulas, slicers, or timelines were found.			
0	Embedded Documents No embedded documents were found.		~	
<u> </u>	lote: Some changes cannot be undone. <u>R</u> einspect	<u>C</u> lo	ose 🖉	

Protecting your workbook

By default, anyone with access to your workbook will be able to open, copy, and edit its content unless you **protect** it. There are many different ways to protect a workbook, depending on your needs.

Ð	Exce	l2016_Inspect_Protect_Practice - Excel
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pen	\\psf » Home » Documents » Excel 2016	lice
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ave As	Protect Workbook •	
rint	Mark as <u>F</u> inal	
hare	Let readers know the workbook is final and make it read-only.	
xport	Encrypt with Password Require a password to open this workbook.	that it contains:
ublish		ilities are unable to read
lose	Control what types of changes people can make to the current sheet.	ved in your file
	Protect Workbook Structure Prevent unwanted changes to the structure	
ccount	of the workbook, such as adding sheets.	isaved changes.
ptions	Grant people access while removing their ability to edit, copy, or print.	•
	Add a Digital <u>Signature</u> Ensure the integrity of the workbook by adding an invisible digital signature.	
	Browser View Option Pick what users can see when th Options	IS is workbook is viewed on the Web.

- Click the File tab to access Backstage view.
- 2. From the **Info** pane, click the **Protect Workbook** command.
- In the drop-down menu, choose the option that best suits your needs. In our example, we'll select Mark as Final. Marking your workbook as final is a good way to discourage others from editing the workbook, while the other options give you even more control if needed.

Protecting your workbook

4. A dialog box will appear, prompting you to save. Click **OK**.



5. Another dialog box will appear. Click **OK**.



Protecting your workbook

6. The workbook will be marked as final.

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¹² Practice

• Open our practice workbook.

 Use Document Inspector to check the workbook and remove anything it finds.

Protect the workbook by Marking As Final.

Solution

			 Excel2016_Inspect_Protect_Practice_Trial [Read- 	Only] - Excel	h.	5		×
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1	A	В	с	D	E	F	F	
1	Order #	Customer Name	Item Description	Order Total	Phone Number			
2	139	Seferian Wilkes	6" Double Layer Chocolate Cake	\$15.45	555-248-1756	1		
3	394	Marla Gaston	10" White Cake with Chocolate Icing	\$17.25	555-122-9875			
4	219	Juan Ricardo	15" Dutch Apple Pie	\$9.56	555-398-2839			
5	150	Andrejz Gorecki	6" Double Layer Chocolate Cake	\$15.45	555-486-5387			
6	265	Sing Lu	10" French Silk Pie	\$8.87	555-336-2576			
7	123	Devesh Assaf	15" Dutch Apple Pie	\$9.56	555-765-9874			
8	108	Jerry Cranston	10" Chocolate Cake with Espresso Icing	\$19.87	555-132-1472			
9	298	Mariela Lopes	6" Double Layer Chocolate Cake	\$15.45	555-987-2315			
10	304	Linda Steinwater	12" Spice Cake with Maple Icing	\$16.75	555-423-3572			
11	203	Archibald Grant	10" French Silk Pie	\$8.87	555-865-2834			
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