

# Securing and Sharing Workbooks 11

## LESSON SKILL MATRIX

Skills	Matrix Skill	Skill Number
Securing Your Work Before Sharing It with Others		
Distributing a Workbook by Email and the Cloud		
Tracking Changes to a Workbook		
Adding Comments to a Workbook		



## KEY TERMS

- change history
- password
- shared workbook
- strong password
- tracking changes



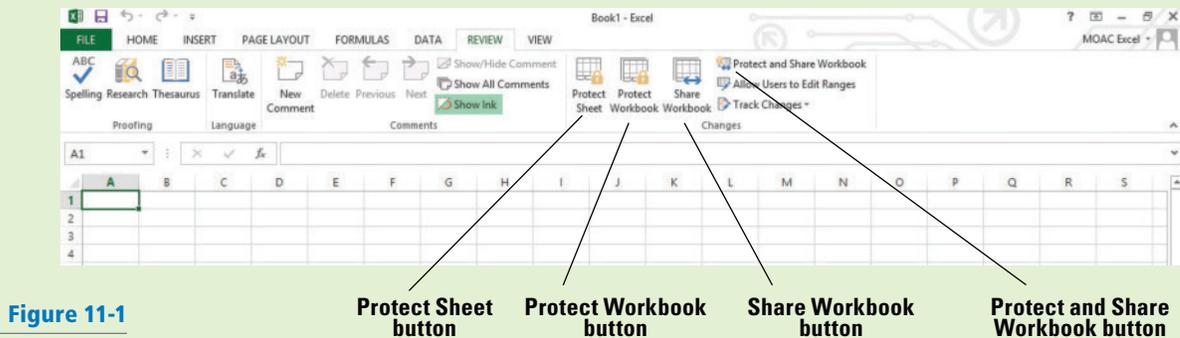
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Contoso, Ltd sees many patients every day. The clinic keeps confidential records about patient visits, medications, and medical issues. In addition, for employees, information about salaries, national identification numbers (social security numbers in the US, social insurance numbers in Canada, or national insurance numbers in the UK), and performance appraisals is stored. The back office staff must be able to share information, but it is critical that much of the information be kept confidential. In this lesson, you learn about Excel's tools for protecting and distributing documents, sharing them, tracking changes, and adding comments.

## SOFTWARE ORIENTATION

### The REVIEW Tab

Microsoft Excel provides several layers of security and protection that enable you to control who can access and change your Excel data. Commands on the REVIEW tab (Figure 11-1) enable you to protect an entire workbook file so that only authorized users can view or modify your data (the highest level of protection). You can also protect certain worksheet or workbook elements to prevent users from accidentally or deliberately changing, moving, or deleting important data. Data protection is especially important when files are shared and edited by multiple users.



**Figure 11-1**  
REVIEW tab

Use this illustration as a reference throughout this lesson as you learn to share and edit files using Excel's security and protection options.

## Bottom Line

## SECURING YOUR WORK BEFORE SHARING IT WITH OTHERS

A **password** is text that must be entered before a user can access a workbook, worksheet, or worksheet elements. You can secure an entire workbook by restricting who can open and/or use the workbook data and by requiring a password to view and/or save changes to the workbook. You can also provide additional protection for certain worksheets or workbook elements with or without applying a password.

## Protecting a Worksheet

In a work environment, workbooks are frequently used by more than one employee. When you create a worksheet that is accessed by multiple users, you often need to protect it so that a user does not accidentally or intentionally change, move, or delete important data. In the next exercise, you use the RAND and RANDBETWEEN formulas to create unique ID numbers.

Excel has two random number functions: RAND and RANDBETWEEN. RAND does not require function arguments, so you cannot specify the number of digits you want in the number returned by a RAND formula. In contrast, RANDBETWEEN allows you to determine the beginning and ending numbers.

## STEP BY STEP

## Protect a Worksheet



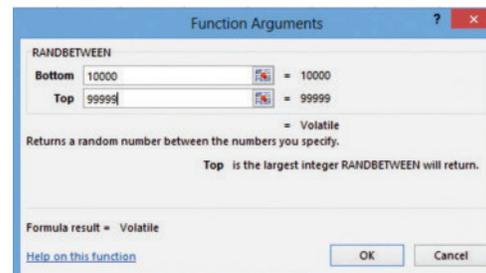
GET READY. LAUNCH Excel.



1. OPEN **11 Contoso Employees** from the data files for this lesson.
2. On the SSN worksheet, select cell **G4**.
3. Click the **FORMULAS** tab, choose **Math & Trig** and select **RANDBETWEEN**. This formula creates a random number for each employee that can be used for identification purposes.
4. In the Function Arguments dialog box, in the Bottom box, type **10000** and in the Top box, type **99999**, as shown in Figure 11-2. Click **OK**. As one of the first steps in information security, employees are usually assigned an Employee ID number that can replace Social Security numbers for US employees, Social Insurance numbers for Canadian employees, and National Insurance numbers for UK employees on all documents.

Figure 11-2

Generating a five-digit random number



5. Double-click the fill handle in cell G4 to copy the range to G5:G33. Each employee is now assigned a random five-digit ID number.
6. With the range **G4:G33** already selected, on the HOME tab, click **Copy**. Click the **Paste** arrow, and then click **Paste Values**.



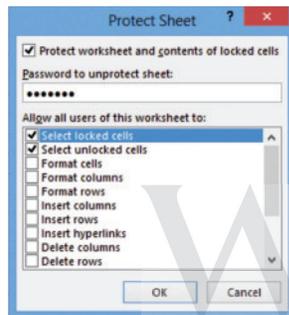
## Troubleshooting

The RANDBETWEEN formula generates a new random number each time a workbook is opened or modified. To retain the Employee ID numbers created by the formula, you must replace the formula with the values.

7. With **G4:G33** selected, on the HOME tab, click **Format** and then select **Format Cells**. Click the **Protection** tab and verify that **Locked** is checked. This prevents employee ID numbers from being changed when the worksheet has been protected. Click **OK**.
8. On the HOME tab, click the **Sort & Filter** button and select **Sort Smallest to Largest**. On the Sort Warning dialog box, select **Continue with the current selection**, and then click **Sort**.
9. Select cells **C4:D33**. On the HOME tab, click **Format**. Notice that the **Lock Cell** command appears selected, meaning the cells are locked by default. Click **Lock Cell** to turn off the protection on these cells to allow these cells to change.
10. Click on the **REVIEW** tab, and in the Changes group, click **Protect Sheet**.
11. In the Password to unprotect sheet box, type **L11!e01**. The password is not displayed in the Password to unprotect sheet box. Instead, asterisks (\*) are displayed as shown in Figure 11-3. Click **OK**.

**Figure 11-3**

The Protect Sheet dialog box displays asterisks (\*) as you type, to protect the password.



12. You are asked to confirm the password. Type **L11!e01** again and click **OK**. You have just created and confirmed the password that will lock the worksheet. Passwords are meant to be secure. This means that all passwords are case sensitive. Thus, you must type exactly what has been assigned as the password—uppercase and lowercase letters, numbers, and symbols.
13. **SAVE** the workbook as **11 Payroll Data Solution**. **CLOSE** the workbook.

**PAUSE.** LEAVE Excel open for the next exercise.

**Take Note** Workbook and worksheet element protection should not be confused with workbook-level password security. Element protection cannot protect a workbook from users who have malicious intent.

## Protecting a Workbook

Assigning a password is an effective way to prevent any user who does not know the password from opening a workbook. To protect an entire workbook, you can require a password to open and view the workbook. You can also require one password to open and view the workbook and a second password to modify workbook data. Passwords that apply to an entire workbook provide optimal security for your data.

Currently, the 11 Payroll Data Solution workbook you saved in the previous exercise can be viewed by anyone who has access to the computer system. You restricted the modification of the file, but you did not restrict access to the data. In this exercise, you will limit access to the workbook by requiring a password to open the document.

Excel passwords can contain up to 255 letters, numbers, spaces, and symbols. Passwords are case sensitive, so you must type uppercase and lowercase letters correctly. If possible, select a strong password that you can remember so that you do not have to write it down. A **strong password**

is one that combines uppercase and lowercase letters, numbers, and symbols—consider the example password of L11!e01 that you used in the previous exercise. A password that uses 14 or more characters, however, is considered to be more secure. Passwords that use birthdates, house numbers, pet names, and so on, provide little protection for anyone who can look up this information on social networks or the Internet.

**Take Note** It is vitally important that you remember passwords assigned to workbooks or worksheets. If you forget your password, Microsoft cannot retrieve it. If necessary, write down passwords and store them in a secure place away from the information you want to protect.

When you protect a worksheet, you can hide any formulas that you do not want to be visible in the formula bar. Select the cells that contain the formulas you want to hide. Then, on the Protection tab of the Format Cells dialog box, select the Hidden check box.

## STEP BY STEP

### Protect a Workbook

GET READY. OPEN the **11 Payroll Data Solution** workbook that you saved and closed in the previous exercise.

1. Click cell **G11** and try to type a new value in the cell. A dialog box informs you that you are unable to modify the cell because the worksheet is protected. Click **OK** to continue.
2. Click cell **D4** and change the number to **1**. You can make changes to cells in columns C and D because you unlocked the cells before you protected the worksheet. Click **Undo** to reverse the change.
3. Click the **Performance** worksheet tab and select cell **D4**.
4. On the **HOME** tab, in the **Cells** group, click the **Delete** arrow, and click **Delete Sheet Rows**. Dr. Bourne's data is removed from the worksheet because this worksheet was left unprotected.
5. Click **Undo** to return Dr. Bourne's data.
6. Click the **SSN** worksheet tab. Click the **REVIEW** tab, and in the **Changes** group, click **Unprotect Sheet**.
7. Type **L11!e01** (the password you created in the previous exercise) and click **OK**.
8. Click cell **D11**. Type **8**, press **Tab** three times, and then type **17000** (see Figure). Press **Tab**.

Figure 11-4

G11 is changed to 17000.

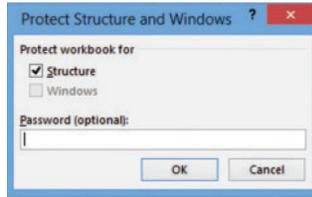
Contoso, Ltd.						
Last Name	First Name	Salary	Years	Job Title	SSN	ID
Banal	Yossi	\$ 292,900	17	Physician	788-288-718	10376
Barnhill	Josh	\$ 30,900	7	Billing Clerk	194-651-816	11854
Bourne	Stephanie	\$ 246,900	15	Physician	684-754-990	13234
Da Silva	Sergio	\$ 83,000	9	Physician Assistant	328-874-858	14449
Delaney	Aidan	\$ 33,675	8	Receptionist	363-130-194	17000
Dellamore	Luca	\$ 41,000	17	Medical Assistant	377-542-826	19614
Giest	Jenny	\$ 55,000	13	Office Manager	640-739-331	20559
Gottfried	Jim	\$ 26,995	7	Receptionist	967-415-725	32561
Hamilton	David	\$ 28,000	11	Medical Assistant	123-788-538	36777
Hensten	Kari	\$ 24,500	1	File Clerk	553-991-446	39781
Hazi	Mor	\$ 352,475	24	Physician	961-515-413	50600
Hicks	Cassie	\$ 481,750	32	Physician	085-224-132	50951
Hoeing	Helge	\$ 42,000	18	Medical Assistant	706-956-751	51817
Holliday	Nicole	\$ 360,000	25	Physician	675-714-302	52446
Iragavarapu	Srinivas	\$ 324,500	21	Physician	911-144-729	55525
Kane	John	\$ 63,350	17	Registered Nurse	586-185-435	57309

9. On the **REVIEW** tab, in the **Changes** group, click **Protect Sheet**. In the two dialog boxes, type the original password for the sheet **L11!e01** to again protect the **SSN** worksheet.

10. On the REVIEW tab, in the Changes group, click **Protect Workbook**. The Protect Structure and Windows dialog box shown in Figure 11-5 opens. Select the **Protect workbook for Structure** check box in the dialog box, if it isn't already selected.

**Figure 11-5**

Protecting the structure of a workbook



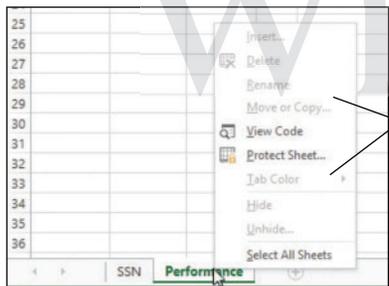
11. In the Password box, type **L11&E02**, and then click **OK**. Confirm the password by typing it again and click **OK**.

**Take Note** The workbook password is optional, but if you do not supply a password, any user can unprotect the workbook and change the protected elements.

12. To verify that you cannot change worksheet options, right-click the **Performance** worksheet tab and notice the dimmed commands shown in Figure 11-6.

**Figure 11-6**

Right-click on Performance worksheet and notice dimmed commands.

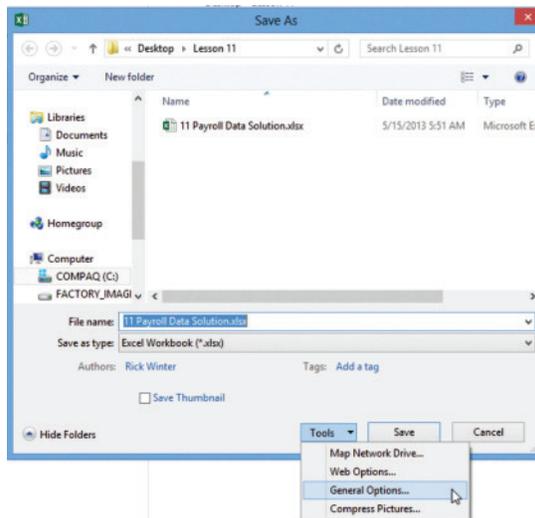


Commands no longer available.

13. Press **Esc** and click the **FILE** tab. Select **Save As**, and then click the **Browse** button.
14. In the Save As dialog box, click the **Tools** button. The shortcut menu opens (see Figure 11-7).

**Figure 11-7**

Use the Tools options in the Save As dialog box to restrict access to the workbook.



15. Select **General Options**. The General Options dialog box opens. In the General Options dialog box, in the Password to open box, type **L11&E02**. Asterisks appear in the text box as you type. Click **OK**.
16. In the Confirm Password dialog box, reenter the password, and then click **OK**. You must type the password exactly the same each time.
17. Click **Save** and click **Yes** to replace the document. As the document is now saved, anyone who has the password can open the workbook and modify data contained in the Performance worksheet because that worksheet is not protected. However, to modify the SSN worksheet, the user must also know the password you used to protect that worksheet in the first exercise.



### Troubleshooting

When you confirm the password to prevent unauthorized viewing of a document, you are reminded that passwords are case-sensitive. If the password you enter in the Confirm Password dialog box is not identical to the one you entered in the previous dialog box, you will receive an error message. Click OK to close the error message and reenter the password in the Confirm Password dialog box.

18. **CLOSE** the workbook and **OPEN** it again.
19. In the Password box, type **111** and click **OK**. This is an incorrect password to test the security. You receive a dialog box warning that the password is not correct. Click **OK**.

**PAUSE.** LEAVE Excel open for the next exercise.

When you saved the Payroll Data Solution workbook in the first exercise in this section, it could be viewed by anyone with access to your computer system or network. As you saw when you opened the file in this exercise, the workbook could be viewed, but the SSN worksheet could not be modified except for the cells that were unlocked. If you saved the file with a different name, that file also would be protected, and you could not alter the data without the password that protects that worksheet.

Protecting the structure of a workbook prevents users from viewing worksheets that you have hidden; inserting new worksheets; or moving, deleting, hiding, or changing the names of worksheets. Selecting the **Windows** box on the Protect Structure and Windows dialog box (refer to Figure 11-5) prevents the user from changing the size and position of the windows when the workbook is opened.



## Workplace Ready

### PASSWORDS AND SECURITY

As you learned in this lesson, assigning a strong password is an important security precaution.

Visit <http://www.microsoft.com/security/default.aspx> and click **Create better passwords**, and then click **Create stronger passwords** to learn more about creating a strong password. The link also has valuable information about protecting yourself from hoaxes and spyware, and about protecting your privacy.

Based on your review of the suggestions for creating strong password, in a new workbook create a list of passwords that you need to change to secure your personal information and protect the integrity of data you create. Do not list your actual passwords; instead, identify the password usage. For example, you might indicate that you need to change the password that you use to access your college email account or your personal email account. Determine a safe storage vehicle for the new passwords you create (in case you forget them).

On the workbook, add a sheet similar to the one that follows that allows you to have your own strong password checklist. The passwords should have eight characters or more and include letters, punctuation, numbers, and symbols. In addition, you should change your passwords often, not share them with anyone unless absolutely required, and do not save individuals passwords or lists in a location that is easily accessed.

	A	B	C	D
1	Strong Password Checker		Goodol&1984*boys!	
2				
3	Objective	Criteria	My password	Meet?
4	Characters	8		17 yes
5	Letters	<Characters		10 yes
6	Punctuation	1		1 yes
7	Numbers	1		4 yes
8	Symbols	1		2 yes++
9	Change frequency (days)	90	No	No
10				
11				

## Allowing Multiple Users to Edit a Workbook Simultaneously

Creating and updating workbooks is frequently a collaborative process. A worksheet or workbook is often routed to other employees so that they can verify data or make changes. In Excel, you can create a **shared workbook**, which is set up to allow multiple users on a network to view and make changes at the same time. When a user opens a shared workbook, he or she can see the changes made and saved by other users. The Protect and Share Workbook command prevents a user from disabling the Track Changes option.

For example, the workbook you create in this exercise is used by the medical assistants, who record all sample medications the physicians prescribe for patients. Sharing this workbook means that more than one medical assistant can access the workbook and enter data at the same time. In this exercise, you learn how to allow users to simultaneously edit workbooks.

### STEP BY STEP

#### Allow Multiple Users to Edit a Workbook Simultaneously

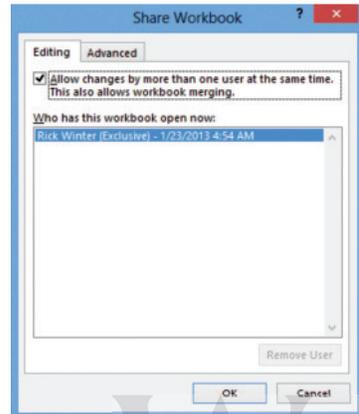
GET READY. LAUNCH Excel if it is not already running.

1. CREATE a new blank workbook.
2. In cell A1, type **Sample Drugs Dispensed** and press **Tab**.
3. Select cells **A1:D1**. On the HOME tab, in the Alignment group, click **Merge & Center**.
4. Select cell **A1**, click **Cell Styles**, and in the Cell Styles gallery that appears, click **Heading 1**.
5. Beginning in cell A3, enter the following data:
 

<b>Medical Assistant</b>	<b>Drug</b>	<b>Patient Date</b>
<b>Dellamore, Luca</b>	<b>Cipro</b>	<b>Chor, Anthony</b>
<b>Hamilton, David</b>	<b>Ketek</b>	<b>Brundage, Michael</b>
<b>Hoeing, Helge</b>	<b>Lipitor</b>	<b>Charles, Matthew</b>
<b>Murray, Billie Jo</b>	<b>Altace</b>	<b>Bishop, Scott</b>
<b>Dellamore, Luca</b>	<b>Zetia</b>	<b>Anderson, Nancy</b>
<b>Hamilton, David</b>	<b>Cipro</b>	<b>Coleman, Pat</b>
<b>Hoeing, Helge</b>	<b>Avelox</b>	<b>Nayberg, Alex</b>
<b>Murray, Billie Jo</b>	<b>Norvasc</b>	<b>Kleinerman, Christian</b>
6. In the Date column, apply today's date to the previous records.
7. Select cells **A3:D3** and apply the **Heading 3** style.

8. Increase the column widths to see all the data.
9. SAVE the workbook as **11 Sample Medications Solution**.
10. Click the **REVIEW** tab, and then, in the Changes group, click **Share Workbook**.
11. In the Share Workbook dialog box, click **Allow changes by more than one user at the same time**. Your identification will appear in the Who has this workbook open now box, as shown in Figure w. Click **OK**.

**Figure 11-8**  
Sharing a workbook



12. Click **OK** when prompted and the action will save the workbook.
13. In the Changes group, click **Protect Shared Workbook**. Select the **Sharing with track changes** check box in the Protect Shared Workbook dialog box. Click **OK**.
14. Notice that **[Shared]** appears in the title bar.
15. SAVE and CLOSE the workbook.

PAUSE. LEAVE Excel open for the next exercise.

In a shared workbook, information is maintained about changes each user makes when they edit the workbook. The **change history** includes the name of the person who made each change, when the change was made, and what data was changed.



#### Cross Ref

Changes can also be turned on and off through the Track Changes button on the REVIEW tab. For more information and to see the result of track changes, see the “Tracking Changes to a Workbook” section later in this lesson.

A shared workbook does not support all Excel features. For example, you can include merged cells, conditional formats, data validation, charts, and so on before a workbook is shared, but these features cannot be added by those who edit a shared workbook.

When you protected your shared workbook, you prevented those who use the workbook from removing the change history. By default, changes made in the workbook will be retained for 30 days. You can increase that time frame on the Advanced tab of the Share Workbook dialog box (refer back to Figure 11-8).



#### Troubleshooting

If you want to assign a password to a shared workbook, you must assign it before the workbook is shared. You can also unshare a workbook and add the password. However, when you unshare a shared workbook, the change history is lost.

## Using the Document Inspector

Before you share an important document with colleagues or individuals outside your organization, you should always spell check, proofread, and review the contents to ensure that everything is correct and the document does not contain anything you do not want to share with others. You should also review the document for hidden data or personal information that might be stored in the workbook or in the document properties. In Excel, the Document Inspector displays several different options that enable you to find and remove hidden data and personal information that is specific to Excel workbooks. The Document Inspector also locates custom XML data, hidden worksheets, and invisible content.

Several types of hidden data and personal information can be saved in an Excel workbook. This information might not be immediately visible when you view the document, but it still may be possible for others to view or retrieve the information. This information includes the following:

- **Comments and annotations:** This information enables other people to see the names of people who worked on your workbook, their comments, and changes that were made to the workbook.
- **Document properties and personal information:** Document properties include the author, subject, and title, as well as the name of the person who most recently saved the workbook and the date the workbook was created.
- **Headers and footers:** Headers and footers can include the author's name, the date the file was created, and so on.
- **Hidden rows, columns, and worksheets:** Columns can be hidden to protect salary and social security (US), social insurance (Canada), or national insurance (UK) data. Before removing hidden rows or columns, be sure that their removal will not change calculations in your worksheet.

### STEP BY STEP

#### Use the Document Inspector



GET READY. OPEN *11 Contoso Employee IDS* from the files for this lesson.

1. Click the **FILE** tab, click **Save As**, click **Browse**, and navigate to the Lesson 11 folder. In the File name box, type *11 Employee ID Doc Inspect Solution* to save a copy of the workbook. Click the **SAVE** button.



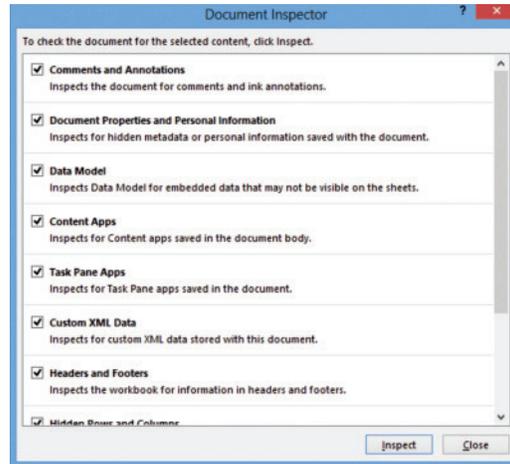
#### Troubleshooting

It is a good idea to perform an inspection on a copy of your workbook because you might not be able to restore hidden content that you remove in the inspection process. If you attempt to inspect a document that has unsaved changes, you will be prompted to save the document before completing the inspection.

2. Click the **FILE** tab. Then, with **Info** selected, click the **Check for Issues** button in the middle pane of the Backstage view. Next, click **Inspect Document**. The Document Inspector dialog box opens, as shown in Figure 11-9.

Figure 11-9

Document Inspector dialog box



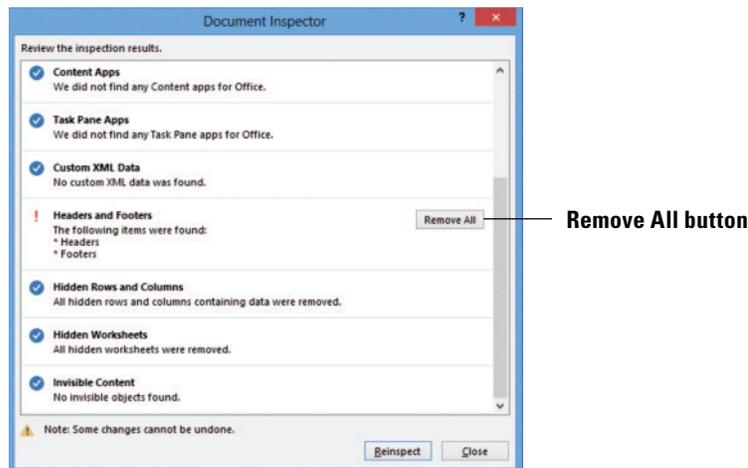
3. Click **Inspect**. The Document Inspector changes to include some Remove All buttons.
4. Click **Remove All** for Comments and Annotations.

**Take Note** You must remove each type of hidden data individually. You can inspect the document again after you remove items.

5. Click **Remove All** three times for Document Properties and Personal Information, Hidden Rows and Columns, and Hidden Worksheets. Headers and Footers should be the only hidden item remaining (see Figure 11-10).

Figure 11-10

Remove All button for Headers and Footers



Remove All button

6. Click the **Close** button to close the Document Inspector dialog box.
7. **SAVE** the workbook.

**PAUSE. CLOSE** the workbook.

When you opened the file in this exercise, it contained hidden columns as well as other information that you didn't want to share with others. You first created a copy of your original workbook because it is not always possible to restore data that the Document Inspector removes. For that reason, you removed sensitive information from the copy; the complete data is retained in the original workbook. If the original workbook was protected, the copy would also be protected, and some of the items in the workbook would not be able to be changed through the Document Inspector. You would have to unprotect the workbook first to run the Document Inspector.

## Marking a Document as Final

Before you share a workbook with other users, you can use the Mark as Final command to make the document read-only and discourage changes to the document. Marking a document as final communicates that you are sharing a completed version of the document, and it helps prevent reviewers or readers from making inadvertent changes to the document.

### STEP BY STEP

### Mark a Document as Final

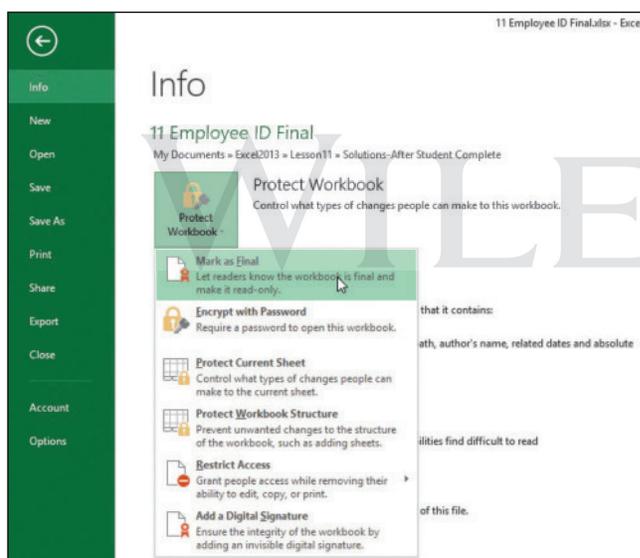


GET READY. OPEN **11 Contoso Employee IDS**.

1. SAVE the workbook in the Lesson 11 folder as **11 Employee ID Final Solution**.
2. Click the **FILE** tab and in Backstage view, click the **Protect Workbook** button. Click **Mark as Final**, as shown in Figure 11-11.

**Figure 11-11**

Mark as Final



3. An Excel message box opens, indicating that the workbook will be marked as final and saved. Click **OK**.
4. Another Excel message box explains that the document has been marked as final. This also means that the file has become read-only, meaning you can't edit it unless you click the Edit Anyway button. Click **OK**. Notice a Marked as Final icon appears in the status bar (See Figure 11-12).

Figure 11-12

Marked as Final icon on the status bar

Marked as Final in worksheet

Marked as Final icon on status bar

Last Name	First Name	Years	Job Title	ID
Barnhill	Josh	7	Billing Clerk	42433
Metters	Susan	10	Billing Clerk	67390
Moreland	Barbara	5	Billing Clerk	47275
Hensien	Kari	1	File Clerk	41551
Kenneth	Kevin	1	File Clerk	99369
Moore	Bobby	20	File Clerk	82353
Dellamore	Luca	17	Medical Assistant	98393
Hamilton	David	11	Medical Assistant	17857
Hoeing	Helge	18	Medical Assistant	67351
Murray	Billie Jo	15	Medical Assistant	55790
Poland	Carole	32	Nurse Practitioner	80471
Giest	Jenny	13	Office Manager	76298
Banal	Yossi	17	Physician	70111
Bourne	Stephanie	15	Physician	90387
Hezi	Mor	24	Physician	78254
Hicks	Cassie	32	Physician	69790
Holliday	Nicole	25	Physician	87051
Iragavarapu	Srinivas	21	Physician	41410
Laszlo	Rebecca	18	Physician	75034
Wilson	Dan	27	Physician	23173
Da Silva	Sergio	9	Physician Assistant	66239
Delaney	Aidan	17	Receptionist	28326
Gottfried	Jim	7	Receptionist	91277
Valdez	Rachel	5	Receptionist	89127
Munson	Stuart	16	Referral Specialist	87853
Wang	Jian	27	Referral Specialist	12185
Kane	John	17	Registered Nurse	50514
Popkova	Darya	19	Registered Nurse	11961
Posti	Juha-Pekka	21	Registered Nurse	31853
Trenary	Jean	20	Registered Nurse	74233

PAUSE. LEAVE the workbook open for the next exercise.

The Mark as Final command is not a security feature. Anyone who opens a workbook that has been marked as final can edit the document by removing the Mark as Final status from the document by clicking the Edit Anyway button.

## DISTRIBUTING A WORKBOOK BY EMAIL AND THE CLOUD

### Bottom Line

The most common ways to share Excel data are by sending workbooks through email, by faxing workbooks, and by printing and distributing hard copies. Email allows you to share a workbook by routing it to one user who can make changes or add comments and then route the workbook to the next user. Changes can then be incorporated into a final document. You can email a workbook as an attachment from Excel or from your email program. You can also send a worksheet as an email message rather than as an attachment.

### Distributing a Workbook by Email

The option to send a worksheet as an email message is available only from the Send to Mail Recipient command on the Quick Access Toolbar. When you add this command to the toolbar, you also can use this option as a shortcut to send a workbook as an attachment. In the next set of exercises, you will learn how to send a workbook as part of the message body and send a workbook as an attached file.

## STEP BY STEP Distribute a Workbook by Email From Excel

GET READY. USE the workbook from the previous exercise. Note that you must have an email program and Internet connection to complete the following exercises.

1. Click the **FILE** tab and click **Share**. In the Share window, click **Email**. Click the **Send as Attachment** button. When you have Office 2013 installed, this feature will open Outlook by default. If you have changed your environment, your own personal email program will open. Notice that Excel automatically attaches the workbook to your email message.
2. In the To field, type [your instructor's email address].
3. In the subject line, replace the current entry with **Employee Final Attached as per request**.
4. In the email message body, type **The Employee ID Final workbook is attached**.
5. Click **Send**. Your email with the workbook attached to it will now be sent to your instructor.

CLOSE the workbook. LEAVE Excel open for the next exercise.

## STEP BY STEP Distribute a Worksheet as an Email Message

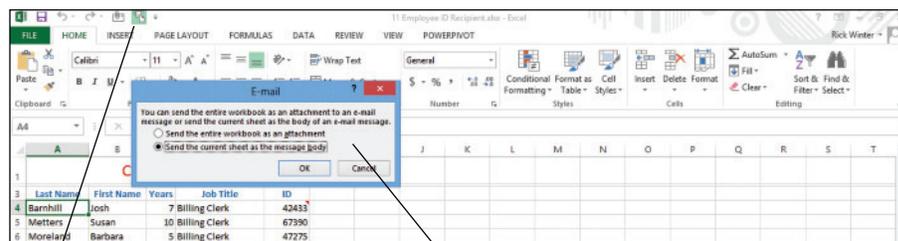


GET READY. OPEN the **11 Contoso Employee IDS** file.

1. SAVE the file in the Lesson 11 folder as **11 Employee ID Recipient Solution**.
2. Click the **FILE** tab and click **Options**. The Excel Options dialog box opens.
3. Click **Quick Access Toolbar**. In the Choose commands from field, click **Email**. In the center bar between the left and right fields, click **Add**. This step adds the Email button to the Quick Access Toolbar.
4. In the Choose commands from drop-down box, click **All Commands**. Click in the list and type the letter **s**, and then scroll and find **Send to Mail Recipient** and click to highlight it. In the center bar between the left and right fields, click **Add**. This step adds this command to the Quick Access Toolbar.
5. Click **OK** to save both commands to the Quick Access Toolbar.
6. On the Quick Access Toolbar, click **Send to Mail Recipient**. The E-mail dialog box opens as shown in Figure 11-13.

Figure 11-13

E-mail dialog box

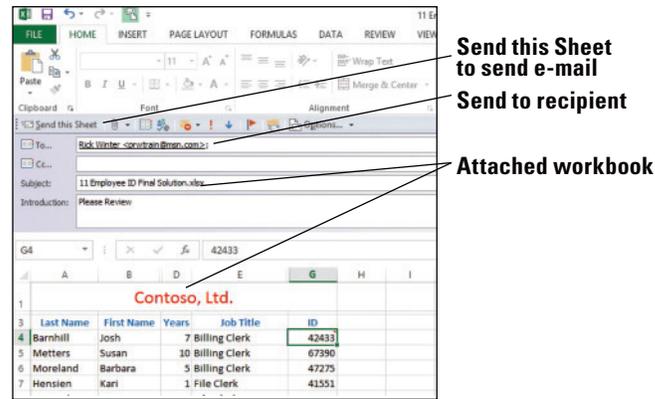


Send to Recipient button  
on Quick Access Toolbar

E-mail dialog box

7. Click the **Send the current sheet as the message body** option, and then click **OK**. The email window is now embedded in your Excel screen with the current worksheet visible as the body of the email.
8. In the To field, type [your instructor's email address] and keep the name of the file in the Subject line. This is automatically added for you.
9. In the Introduction, type **Please Review** (see Figure 11-14).

**Figure 11-14**  
Send to recipient



10. Click the **Send this Sheet** button, as illustrated in Figure 11-14. Click **OK**.
11. There might be a message about hidden rows or columns. If prompted to continue, click **OK**.
12. **SAVE** the workbook.

CLOSE the workbook. LEAVE Excel open for the next exercise.

## STEP BY STEP

### Distribute a Workbook from within your Email Program

GET READY. LAUNCH your email program.

1. Create a new email message.
2. In the To field, type **[your instructor's email address]**.
3. In the Subject line, type **Employee ID Final ready to send**.
4. Click **Attach File**.
5. Navigate to the Lesson 11 folder where you saved **Employee ID Final**. Click the filename, and then click **Insert**.
6. Click **Send**.

CLOSE the email program. LEAVE Excel open for the next exercise.



### Troubleshooting

Some email programs will not send a document as an attachment if the document is open on your computer. If you receive such a message, close the document, and click Send again. Also, the menu choices may be named differently than above for attaching a document. The example is for Outlook 2013.

### Sharing a Workbook in the Cloud

If you click on an Excel workbook while in your SkyDrive.com account, the workbook opens directly in your browser. Windows Live SkyDrive is a virtual online storage area in the cloud where users are able to store, access, and share thousands of documents, photos, and Microsoft Office files. SkyDrive also can password-protect your files so you control who has access to them. Your workbooks look the same in the Web browser as they do in Excel. You can also manage and manipulate your worksheets in the browser using the familiar look and feel of Excel. When you work in the browser, you can change data, enter or edit formulas, and apply basic formatting to the spreadsheet. You can also work with others on the same workbook at the same time.

When you save a document in Windows Live SkyDrive, your document is stored in a central location that you can access from almost anywhere. Even if you're away from your primary computer, you can work on your document whenever you have a connection to the Web even if you don't have Excel on that computer.

Saving a document in SkyDrive also makes it simple to share the document with others. You can send a link directly to them, rather than sending an attachment. This way, you preserve just a single copy of the document. If someone needs to make modifications, they do so in the same copy, with no need to merge multiple versions and copies of the document.

Saving Word, Excel, PowerPoint, and OneNote documents in SkyDrive enables you and others to view and manage the documents in a Web browser using Office Web Apps. This means you can share your document with people without worrying about what application they have installed because they view and edit the documents in their browsers.

## STEP BY STEP

### Share a Workbook in the Cloud

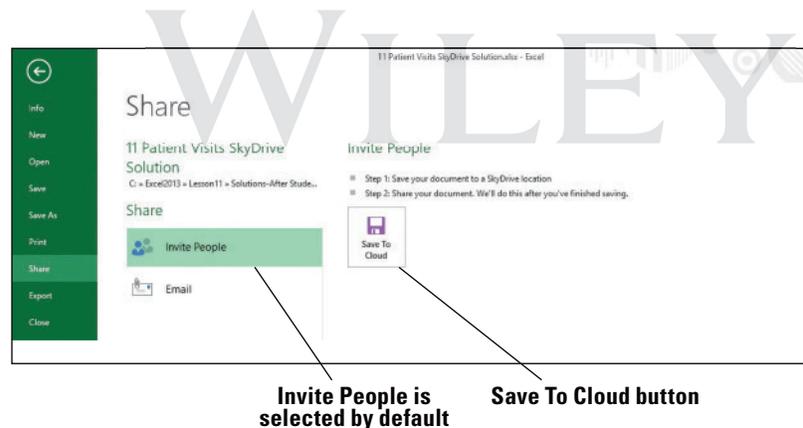


GET READY. OPEN **11 Contoso Patient Visits**.

1. SAVE the workbook to the Lesson 11 folder as **11 Patient Visits SkyDrive Solution**.
2. You will save this again to the SkyDrive. Click **FILE** and then click **Share**. There are two options to choose from before the file is saved to the SkyDrive. Invite People is selected by default, as shown in Figure 11-15.

**Figure 11-15**

Share options.

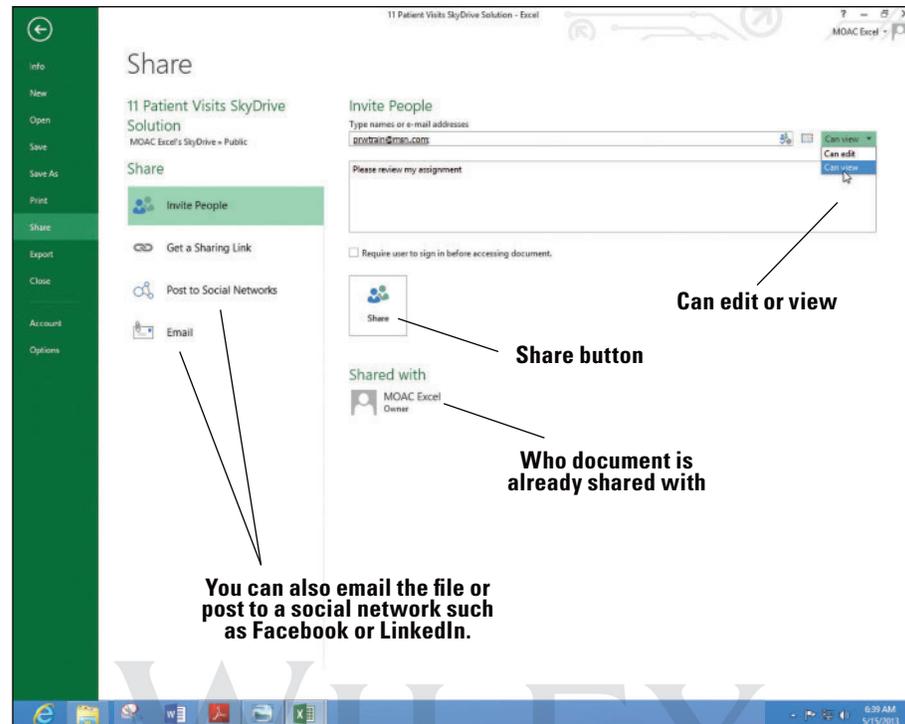


**Invite People is selected by default**

**Save To Cloud button**

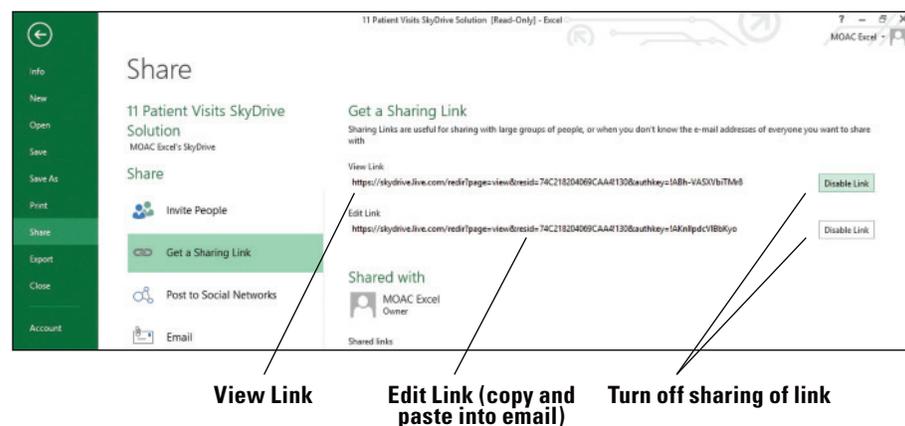
3. Click the **Save To Cloud** button. The Save As pane opens.
4. Click the **SkyDrive** option and click the **Browse** button.
5. In the Save As dialog box, scroll down to the **Public** folder and click **SAVE** to save the file on your Public SkyDrive folder.
6. In the Type names or e-mail addresses box, type **[the email address of your instructor]**.
7. In the next box, type **Please review my assignment**.
8. You can choose whether the instructor can view or edit the Excel file. Click on the arrow after Can edit and change this to **Can view** (see Figure 11-16).

**Figure 11-16**  
Invite People option



9. Click the **Share** button.
10. Open a new email message in your email program and address the email to yourself with a CC to your instructor. Type **Patient Visits** for the Subject. In the Body of the message, type **View**, press **Enter**, and type **Edit**.
11. Return to Excel and click the **Get a Sharing Link** button.
12. Under View Link, click the **Create Link** button, and then after the word View, **COPY** and **PASTE** the link shown to your email message, and then press **Enter** after the link in the email. The link should change to a hyperlink depending on your email program.
13. Return to Excel. Under Edit Link, click the **Create Link** button. Both links show on the screen (see Figure 11-17).

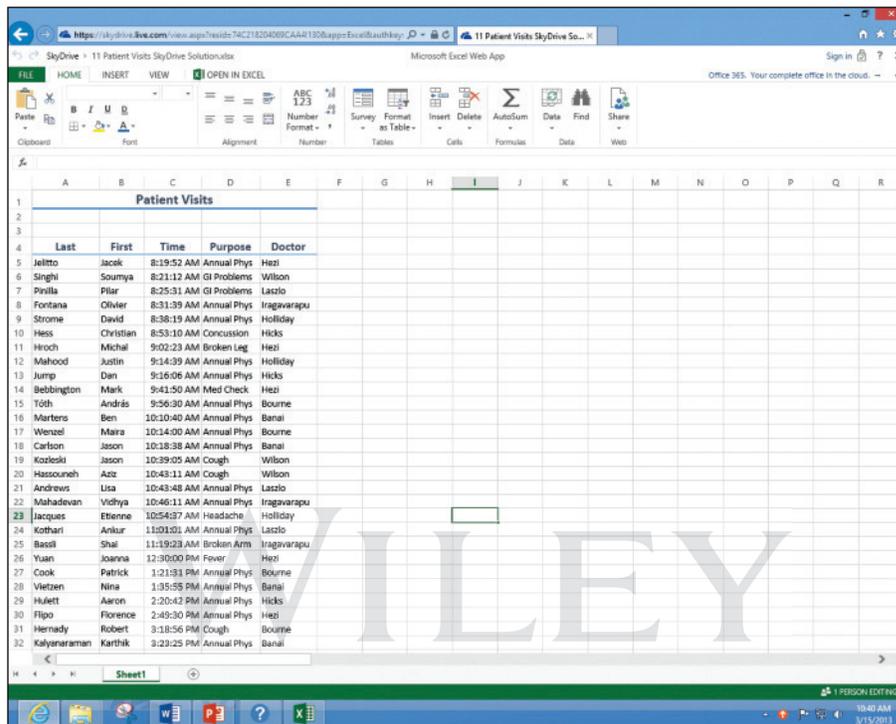
**Figure 11-17**  
Get a Sharing Link options



14. **COPY** and **PASTE** the Edit Link after the word Edit in your email message and press **Enter** after the link. **SEND** the email message.

15. When the message comes to your Inbox, click the **Edit Link** to take you to the Internet and the Excel Web app. If necessary, click the **EDIT WORKBOOK** menu item and choose **Edit in Excel Web App**. Explore the Web interface as shown in Figure 11-18.

**Figure 11-18**  
Document open in  
Internet Explorer



16. CLOSE the Web browser without saving the document, close your email program, and click the **Return to Document** button in Excel.

SAVE and CLOSE the workbook. LEAVE Excel open for the next exercise.

## TRACKING CHANGES TO A WORKBOOK

**Tracking changes** is the ability to mark who makes what changes that have been made to a workbook. The ability to track changes is especially helpful in a workbook that is shared and modified by multiple users. When you turn on Track Changes, the workbook automatically becomes a shared workbook. You can customize the Track Changes feature to track specific types of changes, you can allow the feature to be turned on and off at will by various users, or you can specify a password to protect the changes. You also can decide whether to accept or reject changes to your original workbook data. When you turn off change tracking, the workbook is no longer a shared workbook.

### Turning Track Changes On and Off

You can turn on change tracking using the Track Changes command, the Share Workbook command, or the Protect and Share Workbook command (all located on the REVIEW tab). The Protect and Share Workbook command provides the highest level of security because you can add a password. When workbooks are shared, it is often important to know what changes were made by each user. The owner (creator) of the workbook can use change-tracking functions to manage the data in a shared workbook. The owner can use the change history record to manage the shared workbook by adding or removing users and resolving conflicting changes. In the next exercise, you will learn to track changes.

## STEP BY STEP

## Turn Track Changes On and Off



GET READY. OPEN the **11 Contoso Assignments** workbook for this lesson.

1. SAVE the workbook as **11 Assignments Solution** in the Lesson 11 folder.
2. On the REVIEW tab, in the Changes group, click the **Protect and Share Workbook** button. The Protect Shared Workbook dialog box opens.
3. In the dialog box, click **Sharing with track changes**. When you choose this option, the Password text box becomes active. You can assign a password at this time, but it is not necessary. Click **OK**.
4. Click **OK** when asked if you want to continue and save the workbook. You have now marked the workbook to save tracked changes.

PAUSE. LEAVE the workbook open for the next exercise.

You can turn change tracking off by clicking the Unprotect Shared Workbook button, which was named Protect Shared Workbook before you completed the preceding exercise.



## Cross Ref

The Track Changes command enables you to manage how changes are displayed on your screen. You use this option in an upcoming exercise.

## Take Note

Turning off Track Changes removes the change history and removes the shared status of the workbook, but changes already shown in the document will remain until you accept or reject them.

## Setting Track Change Options

The Advanced tab of the Share Workbook dialog box allows you to customize the shared use of the workbook. These options are normally set by the workbook author before the workbook is shared. In this exercise, you modify these options.

## STEP BY STEP

## Set Track Change Options

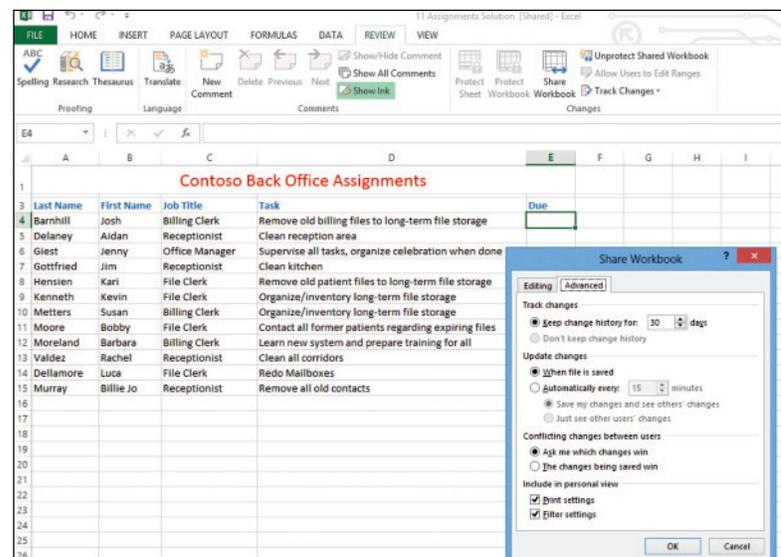


GET READY. USE the workbook from the previous exercise.

1. On the **REVIEW** tab, in the Changes group, click **Share Workbook**. The Share Workbook dialog box opens.
2. Click the **Advanced** tab (see Figure 11-19).

Figure 11-19

Share Workbook Advanced tab



3. In the Keep change history for box, click the **scroll arrow** to display 35.
4. Click the **Automatically every** option button so the file automatically saves every 15 minutes (the default).
5. Click **OK** to accept the default settings for the remainder of the options.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

The Advanced tab contains four options:

- **Track changes** determines whether a change history is kept and the length of time it is kept. In a shared workbook, the change history documents changes made in past editing sessions. The information includes the name of the person who made each change, when the changes were made, and what data was changed. The default setting is 30 days. Contoso maintains a monthly record of the distribution of samples. Setting the change history to 35 days ensures that the office manager has sufficient time to review the workbook and resolve any conflicting changes before the change history is deleted.
- **Update changes** controls when changes made to the shared workbook are incorporated into the workbook.
- **Conflicting changes between users** determines whose edits become part of the file if two or more people attempt to edit at the same time. The workbook owner's changes usually take precedence.
- **Include in personal view** enables each user who edits the workbook to see a personal view of the workbook.

## Inserting Tracked Changes

When you open a shared workbook, Track Changes is automatically turned on. In most cases, the workbook owner has entered a password to prevent a user from turning off Track Changes. Thus, any text you type in the workbook is tracked.

### STEP BY STEP

### Insert Tracked Changes



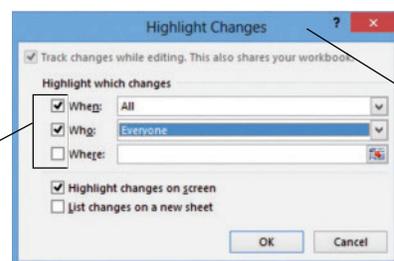
GET READY. USE the workbook from the previous exercise.

1. On the **REVIEW** tab, in the Changes group, click **Track Changes**. In the drop-down list that appears, click **Highlight Changes**. The Highlight Changes dialog box appears.
2. The Track changes while editing box is inactive because Track Changes was activated when you shared the workbook. In the When drop-down box, click the **down arrow**, and then click **All**. In the Who check box and drop-down list, check the box and select **Everyone**. The dialog box should appear as shown in Figure 11-20.

**Figure 11-20**

Inserting tracked changes

Track Changes options



Highlight Changes dialog box

3. The Highlight changes on screen option is already selected. Click **OK**. If a warning box appears, click **OK** to accept.

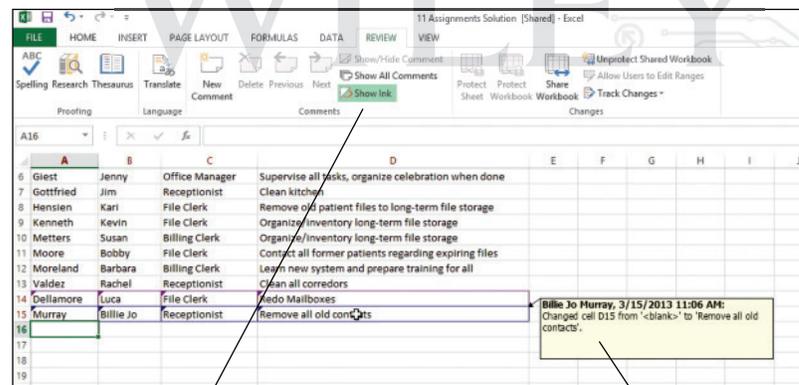
4. Click the **FILE** tab and click **Options**. The Excel Options dialog box opens.
5. In the General category, under Personalize your copy of Microsoft Office, in the User name box, type **Luca Dellamore**. Click **OK**. You have changed the document user name that will be listed in the Track Changes.

**Take Note** Make a note of the name that you remove. You will restore the original user name at the end of this lesson.

6. Click cell **A14** and type the following information in each of the columns:  
**Dellamore Luca File Clerk Redo Mailboxes**
7. As you enter these changes, a colored triangle and comment box appear for each entry made. This makes it easy to view the changes later.
8. On the Quick Access Toolbar, click **Save** to save the changes you made under the user name Luca Dellamore.
9. Click the **FILE** tab and select **Options**.
10. In the **User name** box, type **Billie Jo Murray**. Click **OK**. You are once again changing the user name and applying it to the document.
11. Click cell **A15** and type the following information in each of the columns:  
**Murray Billie Jo Receptionist Remove all old contacts**
12. Move the mouse pointer to cell **D15**. The person's name who made the change, the date of the change, and the change itself appear in a ScreenTip as shown in Figure 11-21.

**Figure 11-21**

Tracked changes in a worksheet



**Show Ink button highlighted when tracking changes**

**Tracked changes with comments**

13. Look at the ScreenTips for the other cells in rows 14 and 15.

**PAUSE. SAVE** the workbook and **LEAVE** it open for the next exercise.

On a network, you do not see changes made by other users until both they and you save your changes. To save your changes to a shared workbook and to see the changes that other users have saved since your last save, click Save on the Quick Access Toolbar or choose other save options such as Ctrl + S. Note that when you work in a network environment, you can click Share Workbook in the Changes group and see a list of other users who have the workbook open.

Sometimes conflicts occur when two users edit a shared workbook and try to save changes that affect the same cell. When the second user tries to save the workbook, Excel displays the Resolve Conflicts dialog box. Depending on the options established when the workbook was created and shared, you can either keep your change or accept the change made by the other user.

You can also display a list that shows how past conflicts have been resolved. These can be viewed on a separate worksheet that displays the name of the person who made the change, when and where it was made, what data was deleted or replaced, and how conflicts were resolved.

## Deleting Your Changes

As noted previously, the changes you make in a shared workbook are not visible to other users until you save your work. Changes become a part of the change history only when you save. If you change your mind before saving, you can edit or delete changes. Changes must be saved before you can accept or reject them. If you do not save, Excel displays a message that the workbook must be saved before you can accept or reject changes. When you have saved your workbook and you want to delete a change, you can either enter new data or reject the change you made before saving.

### STEP BY STEP

#### Delete Your Changes

GET READY. USE the workbook from the previous exercise.

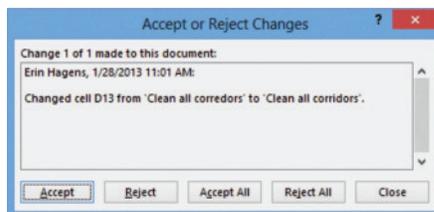
1. Click the **FILE** tab and click **Options**.
2. In the **General** category, under Personalize your copy of Microsoft Office, in the User name box, type **Erin Hagens**. Click **OK**. You have again changed the user of the workbook for change tracking purposes.
3. Select cell **A16** and type the following information in each of the columns:  
**Hagens Erin Receptionist Clean all corridors**
4. Click cell **D13**, and then edit the cell so corridors is spelled correctly. Change corridors to corridors.

**Take Note** Undo is inactive in a shared workbook. If you accidentally replace your data or another user's data, you need to reject the change to restore the data you replaced.

5. On the **REVIEW** tab, click **Track Changes**, and then from the drop-down menu that displays, click **Accept/Reject Changes**. Excel displays a message box confirming that you want to save the workbook. Click **OK**. The Select Changes to Accept or Reject dialog box opens.
6. In the Select Changes to Accept or Reject dialog box, click the **Who** drop-down arrow and select **Erin Hagens**, and then click **OK**. You have just asked Excel to return only the tracked changes made by Erin Hagens (see Figure 11-22). Excel highlights row 16 with green dashes where Hagens' information is typed in.

**Figure 11-22**

Select Changes to Accept or Reject dialog box



**Take Note** The order of the accept or reject changes may appear differently. Accept the change in D13 but reject all other changes.

7. Click **Reject**. All four entries are removed.
8. When cell D13 is selected for the correction of the spelling of corridors, click **Accept**.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

If you replace another user's data and you want to restore the original data, you should reject your change. If you instead delete text you entered as a replacement for other text, you will leave the cell or range blank. Rejecting your change restores the entry that you replaced.

## Accepting Changes from Another User

After a shared workbook has been edited, you can easily identify which cells have been changed and determine whether you want to keep or reject the changes. You can choose to accept or reject all changes at one time without reviewing each change, or you can accept or reject them individually. In the following exercise you will learn how to accept changes from other users.

### STEP BY STEP

#### Accept Changes from Another User

GET READY. USE the workbook from the previous exercise.

1. Click the **FILE** tab and click **Options**.
2. In the General category, under Personalize your copy of Microsoft Office, in the User name box, type **Jim Giest**. Click **OK**.
3. Click **Track Changes** and select **Accept/Reject Changes** from the drop-down list.
4. Not yet reviewed will be selected by default. In the Who box, select **Luca Dellamore**. Click **OK**. The Accept or Reject Changes dialog box is displayed.
5. Click **Accept** to accept each of the changes Luca made. The Accept or Reject Changes dialog box closes when you have accepted all changes made by Luca Dellamore.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

You can also click the Collapse Dialog button in the Where box on the Select Changes to Accept or Reject dialog box and select the cells that contain changes. You can then accept or reject the changes in their entirety. In this exercise, some changes were highlighted by cell and others were highlighted by row, and you could accept or reject changes to the selected cell or range.

## Rejecting Changes from Another User

As the owner of the Assignments workbook, the office manager in the following exercise has the authority to accept or reject changes by all users. Rejecting changes, however, does not prohibit a user from changing the data again. When all users have made the necessary changes, the owner can remove users and unshare the workbook.

### STEP BY STEP

#### Reject Changes from Another User

GET READY. USE the workbook from the previous exercise.

1. Click **Track Changes** and click **Accept/Reject Changes**.
2. On the right side of the Where box, click the **Collapse Dialog** button.
3. Select the data in row **15** and click the **Expand Dialog** button. Click **OK** to close the Select Changes to Accept or Reject dialog box. The Accept or Reject Changes dialog box is displayed.
4. Click **Reject All**. A dialog box will open to ask you if you want to remove all changes and not review them. Click **OK**. The data is removed and row 15 is now blank.
5. SAVE the workbook in the Lesson 11 folder as **11 Assignments Edited Solution**.

PAUSE. LEAVE the workbook open for the next exercise.

When you have the opportunity to work with a shared workbook that is saved on a network, you will likely encounter conflicts when you attempt to save a change that affects the same cell as another user's changes. In the Resolve Conflicts dialog box, you can read the information about each change and the conflicting changes made by another user. The options set on the Advanced tab of the Share Workbook dialog box determine how conflicts are resolved.

## Removing Shared Status from a Workbook

Before you stop sharing a workbook, make sure that all other users have completed their work and that you have accepted or rejected all changes. Any unsaved changes will be lost when you stop sharing and the history worksheet is deleted. Thus, before you remove the shared status from a workbook, you should print the history worksheet and/or copy it to another workbook. In this exercise, you remove shared status from a workbook.

### STEP BY STEP

#### Remove Shared Status from a Workbook

GET READY. USE the workbook from the previous exercise.

1. On the **REVIEW** tab, in the Changes group, click **Track Changes**, and then click **Highlight Changes**.
2. In the When box, All is selected by default. This tells Excel to search through all tracked changes made to the worksheet.
3. Clear the Who and Where check boxes if they are selected.
4. Click the **List changes on a new sheet** check box. Click **OK**. A History sheet is added to the workbook.
5. On the History worksheet, in the corner of the worksheet adjacent to the first column and first row, click the **Select All** button. Click the **HOME** tab, and then in the Clipboard group, click the **Copy** button.
6. Press **Ctrl + N** to open a new workbook.
7. In the new workbook, on the HOME tab, in the Clipboard group, click **Paste**.
8. **SAVE** the new workbook as **11 Assignments History Solution**. **CLOSE** the workbook.

**Take Note** It is a good idea to print the current version of a shared workbook and the change history, because cell locations in the copied history may no longer be valid if additional changes are made.

9. In the shared workbook, click on the **REVIEW** tab, click **Unprotect Shared Workbook** and then click **Share Workbook**. The Share Workbook dialog box is displayed. On the Editing tab, make sure that Jim Giest (the last user name changed in File Options) is the only user listed in the Who has this workbook open now list.
10. Clear the **Allow changes by more than one user at the same time**. Click **OK** to close the dialog box.
11. A dialog box opens to prompt you about removing the workbook from shared use. Click **Yes** to turn off the workbook's shared status. The word Shared is removed from the title bar.
12. **SAVE** and **CLOSE** the workbook.

PAUSE. LEAVE Excel open for the next exercise.

When shared status has been removed from a workbook, changes can be made like they are made in any workbook. You can, of course, turn change tracking on again, which will automatically share the workbook.

## ADDING COMMENTS TO A WORKBOOK

In Excel, you can add a note to a cell by inserting a comment. You can also edit the text in comments and delete any comments that you no longer need. Comments are marked by a red triangle in the upper-right corner of the cell. When you point to this triangle, the comment appears in a box next to the cell, along with the name of the user logged on to the computer at the time the comment was created.

### Inserting a Comment

Comments are a useful technique for calling attention to important or significant data and providing insights from the user that explain more about the data. For example, say that Contoso's employees are evaluated on three performance measures. The manager uses comments to note incidents related to these measures. In this exercise, you learn how to insert comments.

#### STEP BY STEP

#### Insert a Comment

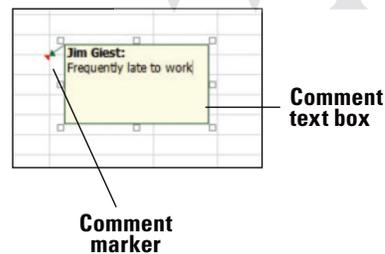


GET READY. OPEN the **11 Contoso Personnel Evaluations** file for this lesson.

1. Select cell **E11**. On the **REVIEW** tab, in the Comments group, click **New Comment**. The comment text box opens for editing.
2. Type **Frequently late to work** as shown in Figure 11-23.

Figure 11-23

New comment text box



3. Click cell **D8**. Press **Shift + F2** and type **Currently completing Masters degree program for additional certification**. Click outside the comment box. The box disappears and a red triangle remains in the upper-right corner of the cell the comment was placed in.
4. Click cell **E4**. Click **New Comment** and type **Adjusted hours for family emergency**.
5. Click cell **F10**. Click **New Comment** and type **Consider salary increase**.
6. SAVE the file as **11 Evaluations Solution**.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

As previously mentioned, Contoso, Ltd. conducts an annual employee performance review. In this workbook, the manager uses comments to note events or actions that he wants to recall when he conducts employees' annual reviews. When you add comments, Excel automatically displays the name that appears in the Name box under General Office settings in the Excel Options dialog box. If you don't want to use a name, you can select it in the comment and press Delete.

## Viewing a Comment

When you rest your pointer over the red triangle that indicates that a cell has a comment attached to it, the comment is displayed. You can keep selected comments visible as you work, or you can display all comments using commands in the Comments group on the REVIEW tab. The Show/Hide Comment and Show All Comments commands allow you to display or hide comments as needed. The Previous and Next commands allow you to move from one comment to another without selecting the cells.

### STEP BY STEP

#### View a Comment

GET READY. USE the workbook from the previous exercise.

1. Click cell **F10** and on the REVIEW tab, in the Comments, group, click **Show/Hide Comment**. Note that the comment remains visible when you click outside the cell.
2. Click cell **E4** and click **Show/Hide Comment**. Again, the comment remains visible when you click outside the cell.
3. Click cell **F10** and click **Show/Hide Comment**. The comment is hidden.
4. In the Comments group, click **Next** twice to navigate to the next available comment. The comment in cell E11 is displayed.
5. In the Comments group, click **Show All Comments**. All comments are displayed.
6. In the Comments group, click **Show All Comments** again to hide all comments and make sure they are no longer displayed.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

## Editing a Comment

Comments can be edited and formatted as needed. You can format a comment using most of the formatting options on the HOME tab in the Font group. However, the Fill Color and Font Color buttons on the HOME tab are not available for comment text. To edit a comment, select the cell containing the comment and click Edit Comment.

### STEP BY STEP

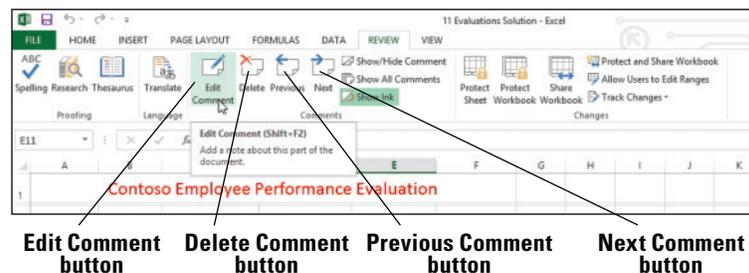
#### Edit a Comment

GET READY. USE the workbook from the previous exercise.

1. Click cell **E11** and move the mouse pointer to the Edit Comment button on the REVIEW tab. The ScreenTip also shows Shift + F2 as an option, as shown in Figure 11-24.

**Figure 11-24**

Edit Comment button and ScreenTip



2. Click the **Edit Comment** button.
3. Following the existing comment text, type a . (period) followed by a **space** and then **Placed on probation**. Then click any cell between F4 and D8.
4. Click **Next**. The comment in D8 is displayed.
5. Select the existing comment text in D8 and type **MA completed; can now prescribe medications**.
6. Click cell **E4** and click **Edit Comment**.
7. Select the text in the comment attached to E4. On the **HOME** tab, click **Bold**.
8. Click cell **E11**, click the **REVIEW** tab, and click **Edit Comment**.
9. Select the name and the comment text. Click the **HOME** tab and notice that the Fill Color and Font Color options are dimmed. **Right-click** on the selected text and select **Format Comment**.
10. In the Format Comment dialog box, click the arrow in the **Color** box and click **Red**. Click **OK** to apply the format and close the dialog box. There is no fill option for the comment box.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

## Deleting a Comment

Of course, you can delete comments from a workbook when they are no longer needed. Unless the workbook is protected, any user can delete comments, so you should consider protecting a workbook that contains sensitive or confidential information. In this exercise, you learn to delete a comment.

### STEP BY STEP

#### Delete a Comment



#### Another Way

To delete a comment, you can click Show/Hide Comment on the REVIEW tab to display the comment and then select the edge of the comment text box and press Delete.

GET READY. USE the workbook from the previous exercise.

1. Click cell **E4**. The comment for this cell is displayed.
2. On the **REVIEW** tab, in the Comments group, click **Delete**.

PAUSE. SAVE the workbook and LEAVE it open for the next exercise.

## Printing Comments in a Workbook

Anyone with access to a workbook can view the comments made by all users. As you learned in a previous exercise, comments can be removed from a workbook before the workbook is shared or copies are distributed. Comments can also be printed as they appear in the worksheet or on a separate page following the workbook. You will learn how to print comments in this exercise.

### STEP BY STEP

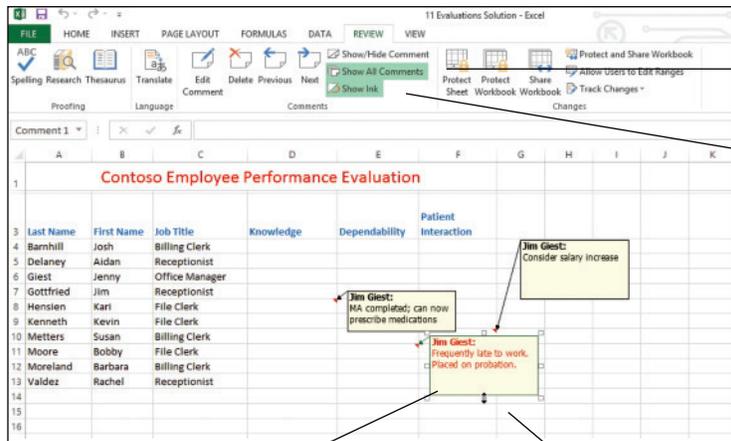
#### Print Comments in a Workbook

GET READY. USE the workbook from the previous exercise.

1. On the **REVIEW** tab, click **Show All Comments**. Notice that the comments slightly overlap each other.
2. In cell D8, click the border of the comment box. Select the center sizing handle at the bottom of the box and drag upward until the comment in cell E11 is completely visible.
3. Move the mouse pointer until it is a four-headed arrow on the border of the comment in cell F10. Drag the comment so it no longer overlaps the comment in cell E11 (see Figure 11-25).

**Figure 11-25**

Setting up a workbook to print with comments



Show All  
Comments  
active

Show Ink  
active when  
comments  
are shown

Border denotes editing  
in progress

Center sizing handle

4. Click the **PAGE LAYOUT** tab, and in the Page Setup group, click **Orientation**. Click **Landscape**.
5. In the Page Setup group, click the **Page Setup dialog box launcher**.
6. On the Sheet tab, in the Comments box, click **As displayed on sheet**.
7. Click **Print Preview**. The Print Options window in Backstage opens.
8. Click **Print**.
9. **SAVE** and **CLOSE** the workbook.

CLOSE Excel.

When you print comments as they appear on the worksheet, the data in some cells may be covered. To print comments on a separate page, select **At end of sheet** in the Comments box on the Sheet tab of the Page Setup dialog box.

## SKILL SUMMARY

In this lesson, you learned how:	Exam Objective	Objective Number
To secure your work before sharing it with others.		
To distribute a workbook by email and the cloud.		
To track changes to a workbook.		
To add comments to a workbook.		

## Knowledge Assessment

### Multiple Choice

Select the best response for the following statements.

- Adding, deleting, moving, and viewing comments are performed from the commands on which ribbon tab?
  - COMMENTS
  - REVIEW
  - FILE
  - VIEW
- The Protect and Share Workbook button is on which ribbon tab?
  - COMMENTS
  - REVIEW
  - FILE
  - VIEW
- Which is NOT an option in the Comments group?
  - New Comment
  - Delete
  - Show Ink
  - Edit Comment
- You can turn on track changes with all of the following EXCEPT:
  - Track Changes button
  - Share Workbook button
  - Protect Sheet button
  - Protect and Share Workbook button
- All of the following are on the REVIEW tab except which of the following?
  - Track Changes button
  - Share Workbook button
  - Protect Cells button
  - Protect and Share Workbook button
- Which of the following would be the strongest password?
  - 02Feb2011 (your dog's birthdate)
  - DenVer (the city in which you were born, with odd capitalization)
  - 679KrDj! (the last three digits of your social security or social insurance number and first names of each of your siblings with an exclamation point)
  - Bruins06 (your high school mascot and year you graduated using the letter O for a zero)
- In Excel, you can require a password for all of the following except which of the following?
  - Opening a file
  - Formatting cells, columns, and rows on a worksheet
  - Adding a new worksheet, deleting a worksheet
  - Deleting a file

8. You can send a workbook to someone by all of the following methods except which of the following?
  - a. Use the FILE, Insert, Email command from Backstage view.
  - b. Open a third-party email program and attach the Excel file.
  - c. Save the workbook on SkyDrive and send a link to the file for viewing only.
  - d. Through a Send to Mail Recipient button you've added to the Quick Access Toolbar.
9. Which of the following functions allows you to have Excel put any number in by chance from 10000 to 99999?
  - a. RAND()
  - b. RANDBETWEEN(10000,99999)
  - c. BYCHANCE(10000,99999)
  - d. RANDOM(10000,99999)
10. You can do all of the following with comments except which of the following?
  - a. Format the text using a different color
  - b. Change the background comment box color
  - c. Not include the user name who made the comment
  - d. Hide the comment

### Fill in the Blank

Complete the following sentences by writing the correct word or words in the blanks provided.

1. A strong \_\_\_\_\_ protects the document because it contains upper and lower case letters, numbers, and symbols.
2. The \_\_\_\_\_ feature allows you to see what each user adds, deletes, or edits in a workbook.
3. The \_\_\_\_\_ includes the name of the person who made each change, when the change was made, and what data was changed.
4. The \_\_\_\_\_ tab contains commands for comments, protecting the worksheet and workbook, sharing the workbook, and track changes.
5. If you want Excel to assign number by chance from 100 to 999, use the \_\_\_\_\_ function.
6. When you want to add a note to a cell without entering cell contents, use cell \_\_\_\_\_.
7. If you want to check the document for hidden properties or personal information, use the \_\_\_\_\_.
8. Use the \_\_\_\_\_ option on the Backstage view to send an email message.
9. You can use the Shift+F2 or \_\_\_\_\_ button to add a note to a cell.
10. The \_\_\_\_\_ tab of the Page Setup dialog box allows you to print comments.

## Competency Assessment

### Project 11-1: Protect a File with a Password

In this project, the office manager has asked you to create an inventory of company credit cards and save the file with a password.

GET READY. LAUNCH Excel if it is not already open.

1. Open a Blank workbook and type **Contoso Credit Card Inventory** in cell A1.
2. Type and format the information in Figure 11-26. The title in cell A1 is merged and centered, with Cell Style Heading 1 applied. The labels in row 3 are centered, with Cell Style Heading 3 applied.

**Figure 11-26**

Creating the Credit Cards workbook.

	A	B	C	D	E
1	<b>Contoso Credit Card Inventory</b>				
2					
3	<b>Issuer</b>	<b>Name on Card</b>	<b>Exp Date</b>	<b>Card</b>	<b>CVC</b>
4	MasterCard	Jenny E. Giest	1/1/2015	9806-7415-9741-7237	274
5	MasterCard	Cassie A. Hicks	12/31/2020	7491-8877-4743-3608	798
6	MasterCard	Dan A. Wilson	1/1/2017	9512-1164-4689-8911	703
7	MasterCard	Mor O. Hezi	1/2/2017	1925-4341-8239-4914	787
8	MasterCard	Nicole I. Holliday	5/9/2019	9357-8825-4945-3995	614
9	Visa	Rebecca E. Laszlo	2/6/2016	8283-1378-3595-8119	569
10	Visa	Srinivas R. Iravarapu	4/25/2018	1259-3980-3012-4877	661
11	Visa	Stephanie T. Bourne	7/21/2017	2716-2332-2847-3247	142
12	Visa	Yossi O. Banai	12/26/2017	1621-4398-6763-2687	918
13					
14					
15					
16					
17					

3. SAVE the file as **11 Credit Cards Solution** for use in each of the other exercises.
4. Click the **FILE** tab and Info is automatically selected; click **Protect Workbook** and choose **Encrypt with Password**.
5. In the Encrypt Document dialog box, type **11P1!s5** and reenter the same password in the Confirm Password dialog box.
6. SAVE and CLOSE the workbook.

LEAVE Excel open for the next project.

## Project 11-2: Email and Save a File to SkyDrive

In this project, you will email your workbook to your instructor and save the file to the SkyDrive.

GET READY. LAUNCH Excel if it is not already open.

1. OPEN the **11 Credit Cards Solution** file you created in the first project. Use the password you created in Project 11-1.
2. SAVE the file as **11 Credit Cards Email Solution**.
3. Select the **FILE** tab, and then **Share**.
4. Invite People is already selected. Click **Save to Cloud**.
5. Click on your **SkyDrive** icon and then **Browse**, and select the SkyDrive folder for this lesson.
6. Click **Save**. You return to the Share screen.
7. Type the [email address of your instructor], in the personal message box, type **Project 2 Assignment** and click the **Share** button **SEND** the email message.

CLOSE the workbook and LEAVE Excel open for the next project.

## Proficiency Assessment

### Project 11-3: Send Links for Editing and Viewing a File on the Web

In this project, you will send the links for viewing and editing the file on the Web to your instructor and yourself.

GET READY. LAUNCH Excel if it is not already open.

1. OPEN the **11 Credit Cards Solution** file you created in the first project. Use the password you created in Project 11-1.

2. SAVE the file as **11 Credit Cards Links Solution**.
3. Use the **Share** option on the Backstage view to save the file to the cloud.
4. Open your email program and add your instructor's email address. In the body of the message, type **View** and press **Enter** and then type **Edit**.
5. Return to Excel's Backstage view Share page and click **Get a Sharing Link** for viewing, copy this in the email message after the word View, and then copy the link for editing and copy this in the email message after the word Edit. **SEND** the email message.
6. SAVE and CLOSE all open workbooks.

LEAVE Excel open for the next project.

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### Project 11-4: Add Comments to a File

In this project, you will add comments to a file.

GET READY. LAUNCH Excel if it is not already open.

1. OPEN the **11 Credit Cards Solution** file you created in the first project. Use the password you created in Project 11-1.
2. SAVE the file as **11 Credit Cards Comments Solution**.
3. In cell **B4**, type a new comment **Initial E will be removed on next card**.
4. In cell **D9**, type a new comment **Card lost – need to cancel if not found by tomorrow**.
5. In cell **B12**, type a new comment **Yossi will be leaving at the end of the quarter – make sure to cancel card**.
6. Edit the comment in **D9** to just say **Card lost and found [today's date]**.
7. Make sure all comments are hidden.
8. **PRINT** the worksheet with the comments displayed at the end of the sheet.
9. SAVE and CLOSE the workbook.

LEAVE Excel open for the next project.

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## Mastery Assessment

### Project 11-5: Track Changes

In this project, you will open the credit card file and track changes with different users.

GET READY. LAUNCH Excel if it is not already open.

1. OPEN the **11 Credit Cards Solution** file you created in the first project. Use the password you created in Project 11-1.
2. SAVE the file as **11 Credit Cards Changes Solution**.
3. In cell **F3**, type **Balance** and continue the formatting for row 3.
4. Format column **F** to be **Accounting Number Format**.
5. Change the label in row 1 to be merged and centered across **A1:F1**.
6. Track changes for all users.

- Change the username prior to each change to be the user whose name is on the card in row 4 and enter the balances below for each user in column F. SAVE the workbook after each balance is entered.

Jenny E. Geist	\$3,533.15
Cassie A. Hicks	\$9,929.25
Dan A. Wilson	\$952.92
Mor O. Hezi	\$9,768.55
Nicole I. Holliday	\$1,669.72
Rebecca E. Laszlo	\$166.00
Srinivas R. Iragavarapu	\$6,186.08
Stephanie T. Bourne	\$8,662.97
Yossi O. Banai	\$1,621.48

- List the changes on a new sheet.
- Create a copy of the History sheet to a new workbook and save the workbook as **11 Credit User Changes Solution**.
- Accept everyone's changes except Dan's in F6 and Rebecca's in F9.
- SAVE and CLOSE both workbooks.

LEAVE Excel open for the next project.

## Project 11-6: Lock Cells and Protect Worksheet Elements

This project will put together various features of worksheet security and annotation, and then have you share the workbook with other users.

GET READY. LAUNCH Excel if it is not already open.

- OPEN the **11 Credit Cards Solution** file you created in the first project. Use the password you created in Project 11-1.
- SAVE the file as **11 Credit Cards Passwords Solution**.
- Turn off the password for the file (delete all characters).
- Add a label in F3: **Birthday** and one in G3: **Mom Name**. Format these two labels the same as other labels in the row and increase column width to fit.
- Change the title of the workbook in A1 to read **Contoso Credit Card Passwords** and center across **A1:G1**.
- Add a label in A17: **Password is Birthday in yyyyymmdd format + first 4 characters of Mom's Maiden name**.
- Unlock the input for Birthday and Mom Name columns (**F4:G12**).
- Protect Sheet** with the password of the company name: **Contoso**.
- Send this workbook in an email to your instructor. The subject should read: CC Passwords. The body text should read Go to your row. In column F type **your birth date**. In column G type **your mother's maiden name**. After you complete these changes, make sure to email the workbook back to me on Friday.
- The following will simulate getting each workbook back. Enter the following data:

Name on Card	Birthday	Mom Name
Jenny E. Giest	4/7/1955	Soon
Cassie A. Hicks	11/6/1953	Banti
Dan A. Wilson	11/27/1949	Meadows
Mor O. Hezi	5/27/1950	Mayo
Nicole I. Holliday	7/20/1952	Kim
Rebecca E. Laszlo	2/23/1970	Untch
Srinivas R. Iragavarapu	2/1/1959	Chia
Stephanie T. Bourne	6/10/1945	Brauninger
Yossi O. Banai	7/5/1948	Posti

11. In the Excel Options dialog box, change the User name to the original name for this computer.
12. Put a comment in cell G4: **Password would look like 19550407Soon.**
13. Click the **FILE** tab, choose **Options**, select **Quick Access Toolbar**, click the **Reset** button, and select the **Reset all customizations** option to return your Excel settings to normal.
14. Send an email to your instructor with a critique of this worksheet. In the email text, tell your instructor how you would improve the worksheet or the process of creating it.

CLOSE Excel.

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WILEY