

# Password Protecting Files

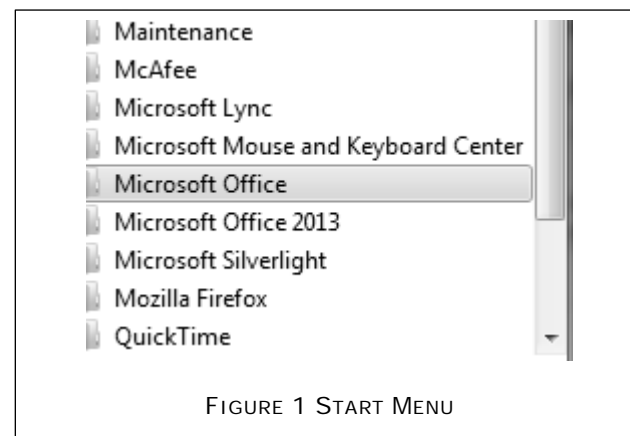
## 1. Password Protecting Files

Since these files have PII (SSN, DOB), you need to protect the files. One way is to set up a password protection. You will need to enter the password to open the file.

### 1.1 Identify Excel Version

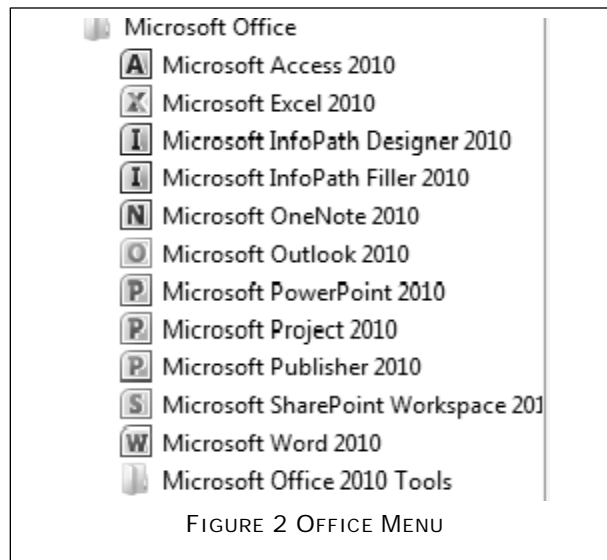
The instructions for working with Excel differ based on the version of Microsoft Office that you have. You may be able to determine what version of Microsoft Office you have by looking at the Start Menu. If not, the following information may help you determine which set of instructions to use. Please note: The pictures are from Word, but the same steps apply to Excel.

- Click on the Microsoft Gem  or Start  emblem on the bottom left to open the Start Menu.
- Double click the *Microsoft Office* folder.



The programs listed inside of the folder will have the year of release as part of the program name. Example: Microsoft Excel 2010 is the 2010 edition (Figure 2).

# Password Protecting Files

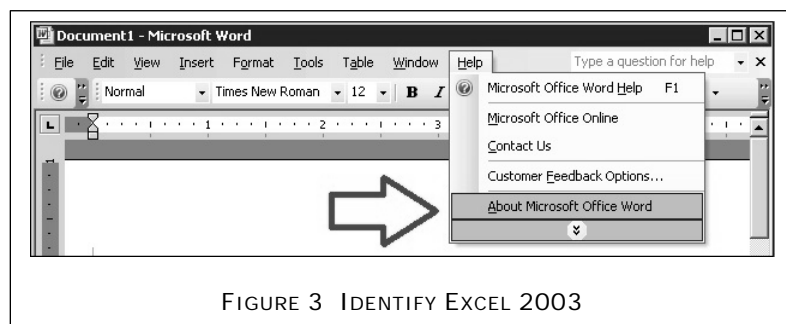


## 1.2 Excel 2003

### 1.2.1 Identify Excel 2003

Office 2003 has text-based menus on the gray bar: File, Edit, View, Insert, Format, Tools, Table, Window, and Help. (The screen shots are based on Word, but it works the same in Excel.)

- Click *Help > About* (Figure 3)
- In the *About* Dialog box, find the version on the top line.



# Password Protecting Files

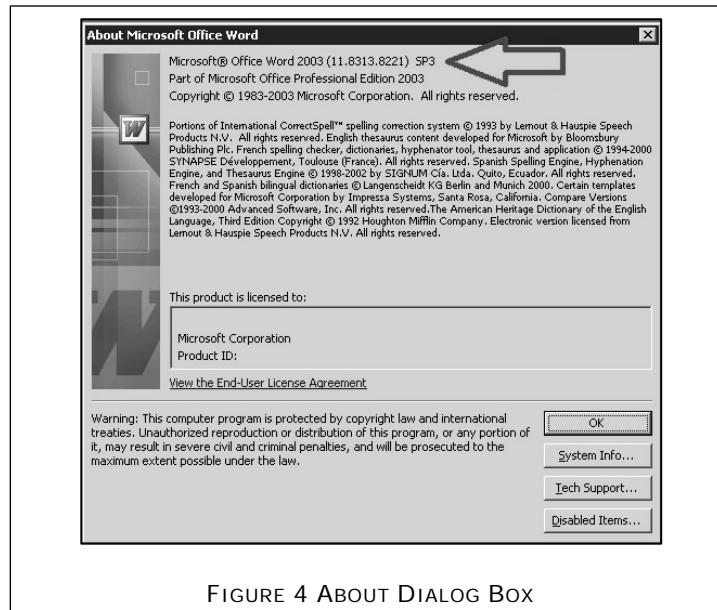


FIGURE 4 ABOUT DIALOG BOX

## 1.2.2 Password Protect in Excel in 2003

- Go to the *File* menu and click *Save As* (Figure 5)

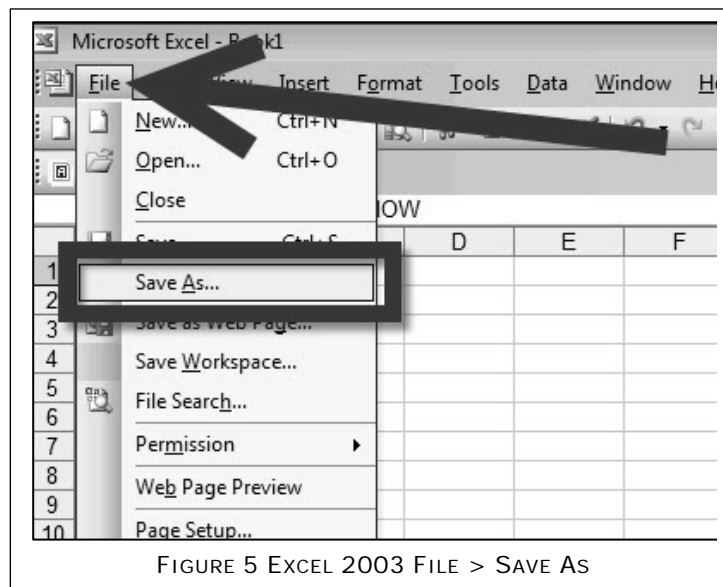
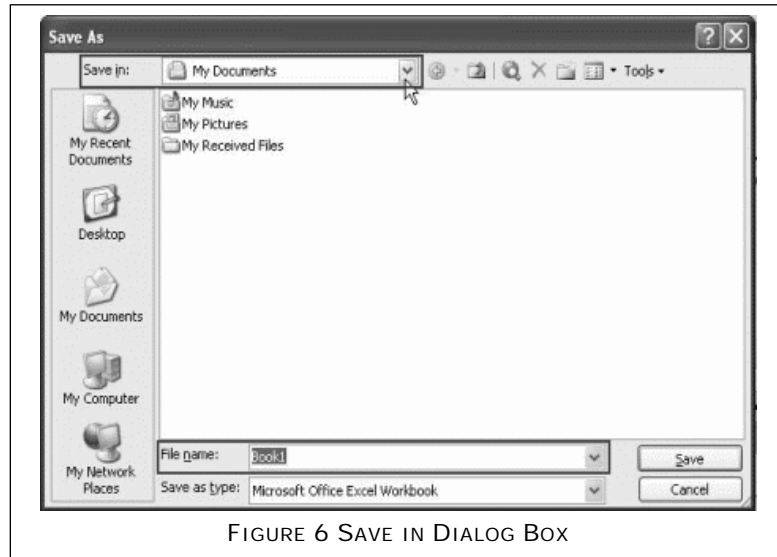


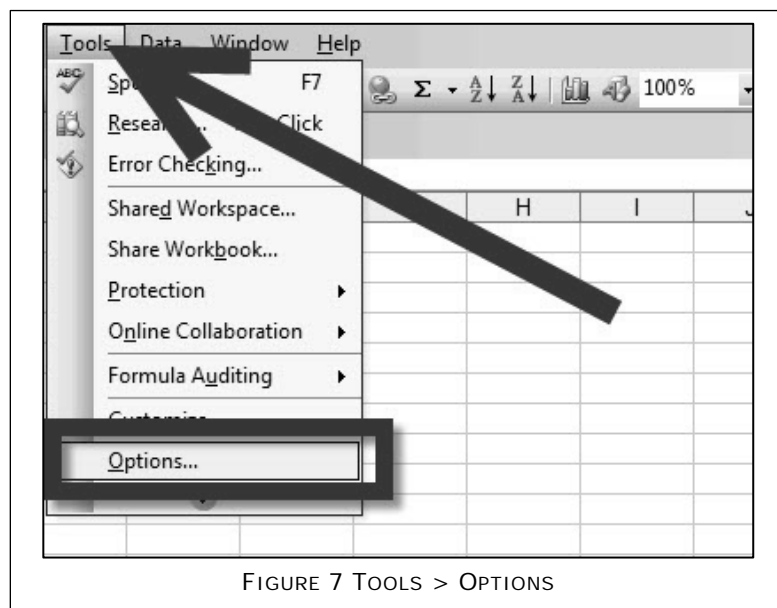
FIGURE 5 EXCEL 2003 FILE > SAVE AS

# Password Protecting Files

- Navigate to drive and/ or folder where you plan to save the document in the *Save in* box at the top. (Figure 6)
- Enter the document name and click OK.



- From the *Tools* menu, click *Options*. (Figure 7)



# Password Protecting Files

- On the *Security* tab, type a password in the field for *Password to Open* (Figure 8).
- You do not have to add a password in the field for *Password to Modify*.

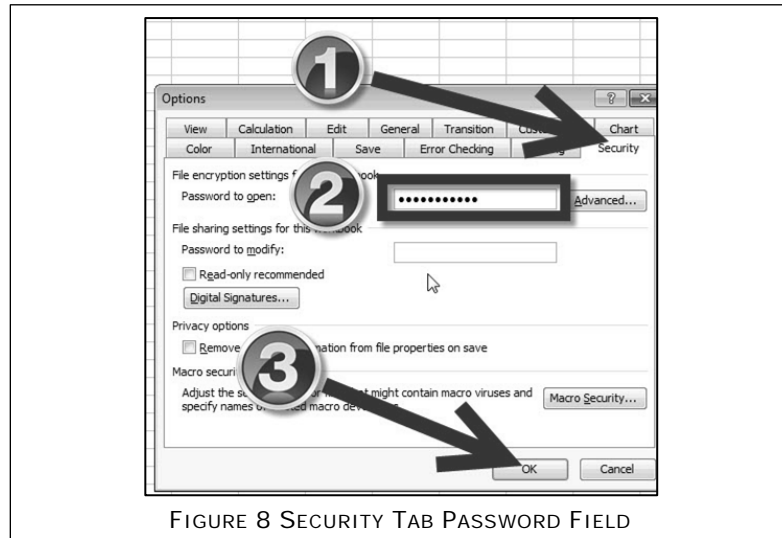




FIGURE 8 SECURITY TAB PASSWORD FIELD

## 1.3 Excel 2007

### 1.3.1 Identify Office 2007

Office 2007 introduced tabs and the Microsoft Office Button  and a tab menu.

- Click the *Microsoft Office Button*  > *Excel Options*.
- In the *Options* dialog box, click *Resources*. Find the version. (Figure 10)

# Password Protecting Files

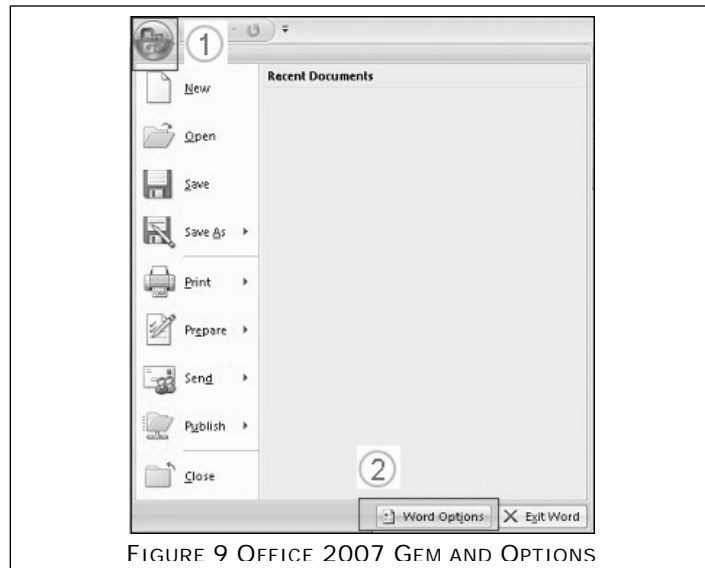


FIGURE 9 OFFICE 2007 GEM AND OPTIONS

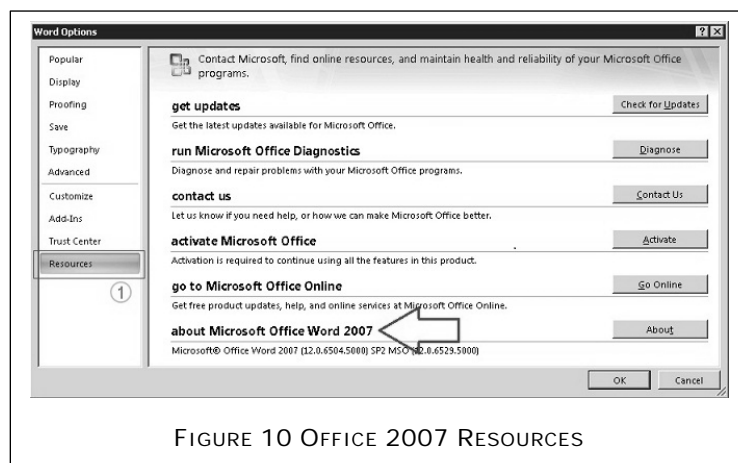



FIGURE 10 OFFICE 2007 RESOURCES

## 1.3.2 Password Protect in Excel 2007

- Click the *Microsoft Office Button*  > *Save As*. Use the down arrow in the address box at the top to navigate to where you plan to save the document.
- Enter the document name and click *Save* (Figure 11).

# Password Protecting Files

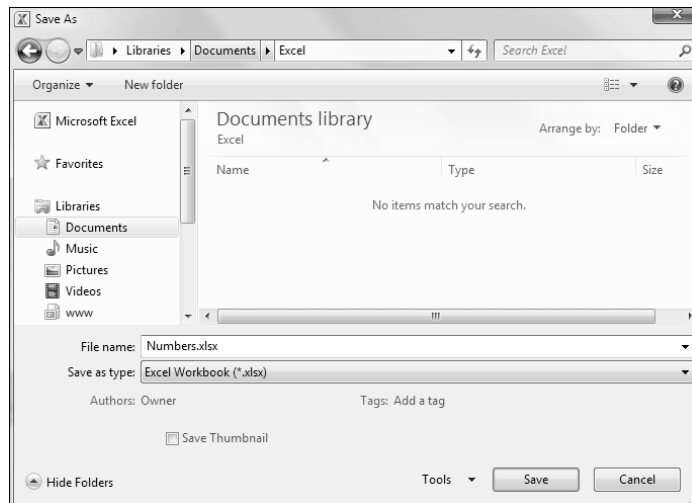


FIGURE 11 OFFICE 2007 SAVE AS DIALOG BOX

Click the *Microsoft Office* button, point to *Prepare*, and then click *Encrypt Document* (Figure 12).

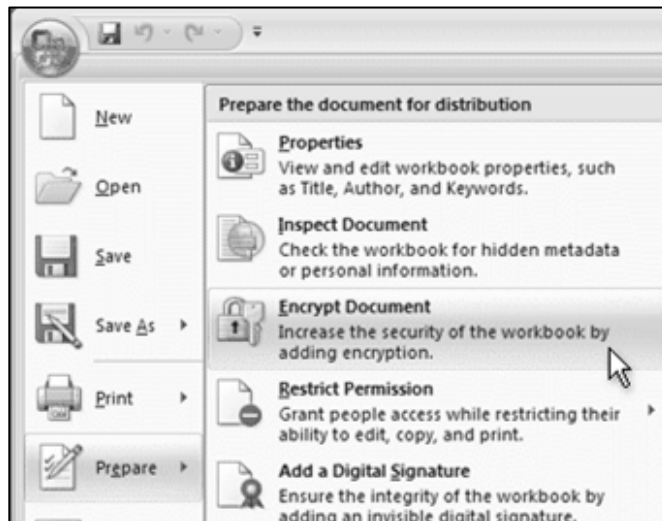


FIGURE 12 OFFICE 2007 ENCRYPT DOCUMENT

In the *Password* box, type the password and select *OK*.

# Password Protecting Files

## 1.4 Excel 2010

### 1.4.1 Identify Office 2010

Office 2010 introduces the *File* tab and the Microsoft Office Backstage view.

Select *File > Help*

Under Product Activated, find the version (Figure 13).

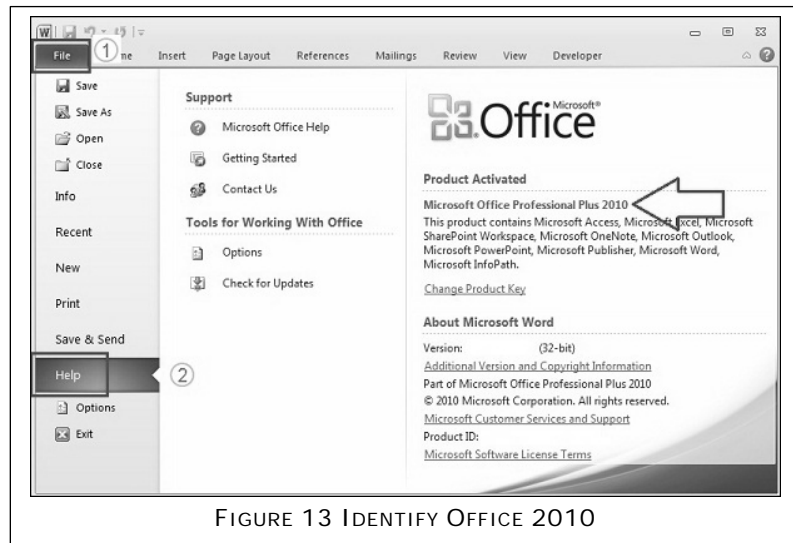


FIGURE 13 IDENTIFY OFFICE 2010

### 1.4.2 Password Protect Excel 2010

See Password Protecting instructions for Office 2010, Office 2013 and Office 365 (page 9)

## 1.5 Excel 2013 and Office 365

### 1.5.1 Identify Office 2013 and Office 365

Office 2013 and Office 365 still use the *File* tab and the Microsoft Office Backstage view.

- Select *File > Account*



# Password Protecting Files

- Under Product Information find the version. (Figure 14)

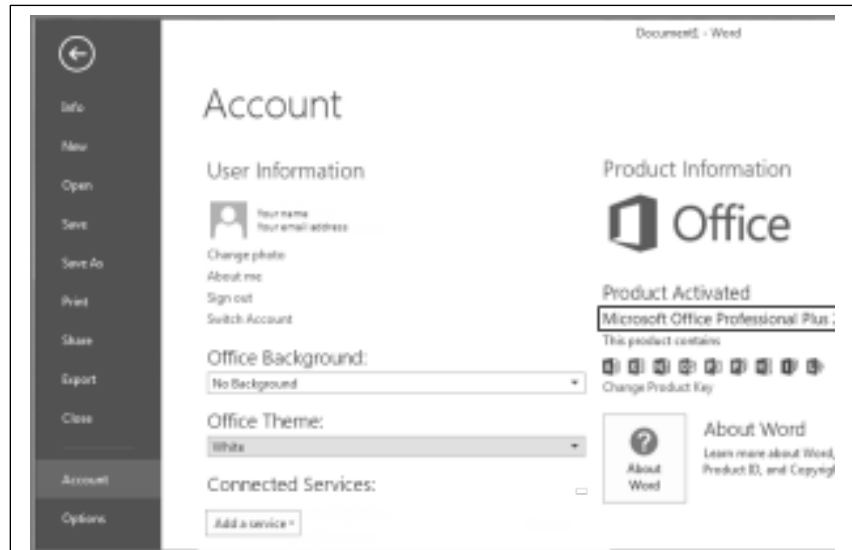


FIGURE 14 ACCOUNT > PRODUCT INFORMATION

## 1.5.2 Password Protect in Excel 2010, 2013 and Office 365

- Click *File > Save as*.
- Use the down arrow in the address box at the top to navigate to where you plan to save the document.
- Enter the document name.
- Do not click *Save* yet. (Figure 15)

# Password Protecting Files

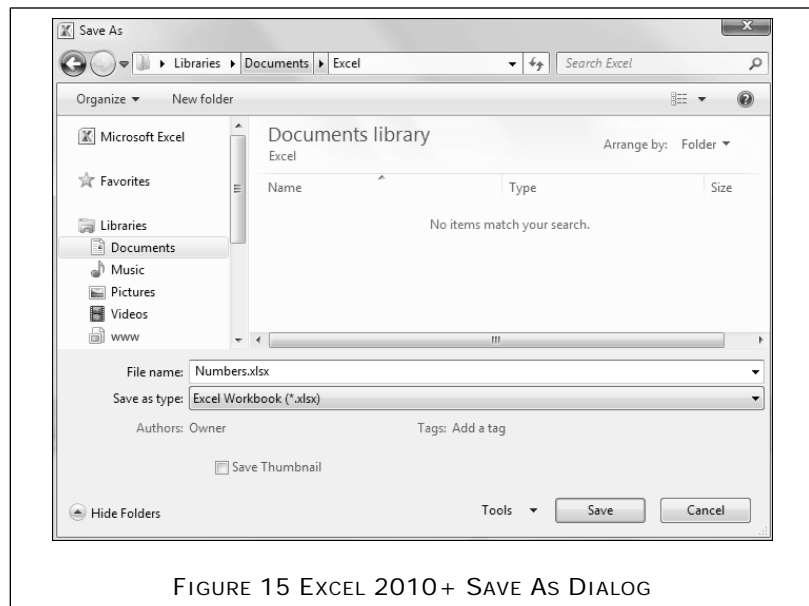


FIGURE 15 EXCEL 2010+ SAVE AS DIALOG

- Click on *Tools* (bottom right) > *General Options* (Figure 16)

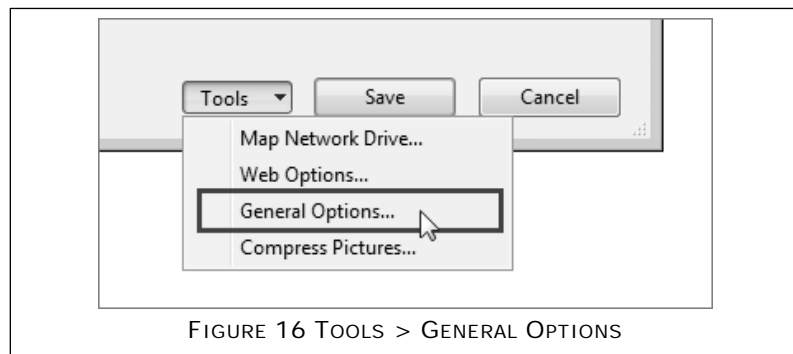


FIGURE 16 TOOLS > GENERAL OPTIONS

- In the *Password to Open* box, type a password and select *OK*. Select *Save* (Figure 17).

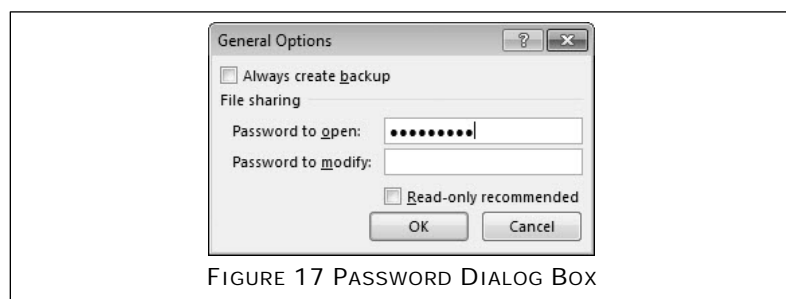


FIGURE 17 PASSWORD DIALOG BOX