

14 Collaborating with Colleagues

In this chapter, you will learn how to

- ✓ Share workbooks.
 - ✓ Manage comments.
 - ✓ Track and manage colleagues' changes.
 - ✓ Protect workbooks and worksheets.
 - ✓ Authenticate workbooks.
 - ✓ Save workbooks for the Web.
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Even though one individual might be responsible for managing an organization's financial data and related information, many people have input when making revenue projections. You and your colleagues can enhance the Microsoft Excel 2010 workbook data you share by adding comments that offer insight into the information the data represents, such as why revenue was so strong during a particular month or whether a service level might be discontinued. If the workbook in which those projections and comments will be stored is available on a network or an intranet, you can allow more than one user to access the workbook at a time by turning on workbook sharing. When a workbook has been shared with your colleagues, you can have the workbook mark and record any changes made to it. You can then decide which changes to keep and which to reject.

If you prefer to limit the number of colleagues who can view and edit your workbooks, you can add password protection to a workbook, worksheet, cell range, or even an individual cell. Adding password protection prevents changes to critical elements of your workbooks. You can also hide formulas used to calculate values.

If you work in an environment in which you and your colleagues, both inside and outside your organization, exchange files frequently, you can use a digital signature to help verify that your workbooks and any macros they contain are from a trusted source.

Finally, if you want to display information on a Web site, you can do so by saving a workbook as a Web page. Your colleagues won't be able to edit the workbook, but they will be able to view it and comment by e-mail or phone.

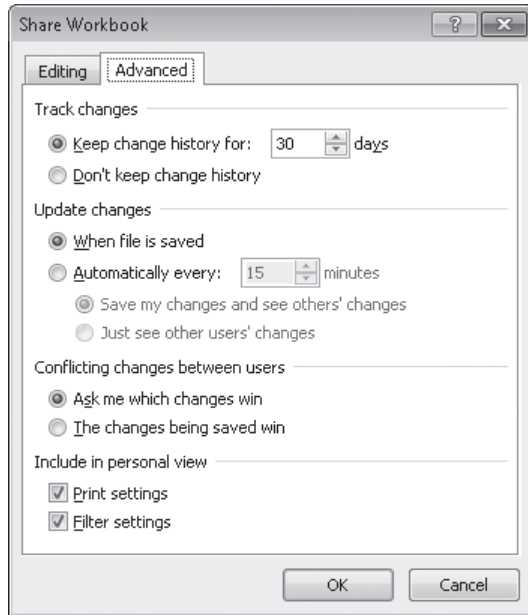
In this chapter, you'll learn how to share a workbook, manage comments in workbook cells, track and manage changes made by colleagues, protect workbooks and worksheets, digitally sign your workbooks, and save your workbooks for the Web.

Practice Files Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter14 practice file folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

Sharing Workbooks

To enable several users to edit a workbook simultaneously, you must turn on workbook sharing. Workbook sharing is perfect for an enterprise such as Consolidated Messenger, whose employees need to look up customer information, shipment numbers, and details on mistaken deliveries.

To turn on workbook sharing, on the Review tab, in the Changes group, click Share Workbook. On the Editing page of the Share Workbook dialog box, turn on workbook sharing by selecting the Allow Changes By More Than One User At The Same Time check box. You can then set the sharing options for the active workbook by clicking the Advanced tab.



Important You can't share a workbook that contains an Excel table. To share the workbook, convert the Excel table to a regular cell range by clicking the Excel table, clicking the Design tab and then, in the Tools group, clicking Convert To Range. Click Yes in the dialog box that opens to confirm the change.

On the Advanced page of the Share Workbook dialog box, two settings are of particular interest. The first determines whether Excel should maintain a history of changes made to the workbook and, if so, for how many days it should keep the history. The default setting is for the program to retain a record of all changes made in the past 30 days, but you can enter any number of days you like. If you revisit your workbook on a regular basis, maintaining a list of all changes for the past 180 days might not be unreasonable. For a workbook that changes less frequently, a history reaching back 365 days (one year) could meet your tracking and auditing needs. Excel deletes the record of any changes made earlier than the time you set.

Tip You should find out whether your organization has an information retention policy that would affect the amount of time you should keep your workbooks' change histories.

The other important setting on this page deals with how Excel decides which of two conflicting changes in a cell should be applied. For example, a service level's price might change, and two of your colleagues might type in what they think the new price should be. Selecting the Ask Me Which Changes Win option enables you to decide whether to keep the original price or the changed price.

There are two main ways to share a workbook with your colleagues: you can make it available over your organization's network, and you can send a copy of the file to your colleagues via e-mail. Every organization's network is different, so you should check with your network administrators to determine the best way to share a file. Similarly, although the specific command to attach a file to an e-mail message is different in every e-mail program, the most common method of attaching a file is to create a new e-mail message and then click the Attach button, as in Microsoft Outlook 2010.

In this exercise, you'll turn on workbook sharing and then attach the file to an Outlook 2010 e-mail message.

Important You must have Outlook 2010 installed on your computer to follow this procedure exactly.

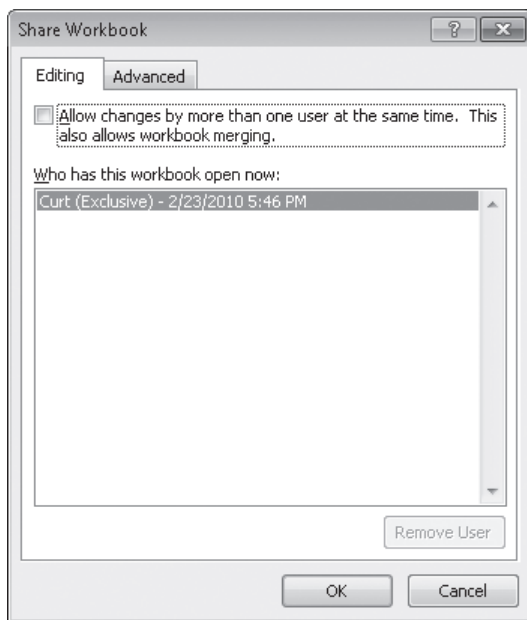


SET UP You need the *CostProjections_start* workbook located in your Chapter14 practice file folder to complete this exercise. Start Excel, open the *CostProjections_start* workbook, and save it as *CostProjections*. Then start Outlook, and follow the steps.



1. In Excel, on the **Review** tab, in the **Changes** group, click **Share Workbook**.

The Share Workbook dialog box opens.



2. Select the **Allow changes by more than one user at the same time** check box.

Tip Workbook merging is the process of bringing changes from several copies of a shared workbook into the source workbook. For more information on the topic, press F1 to display the Excel Help dialog box, search for workbook merging, and click the [Merge Copies Of A Shared Workbook](#) link.

3. Click **OK**.

A message box appears, indicating that you must save the workbook for the action to take effect.

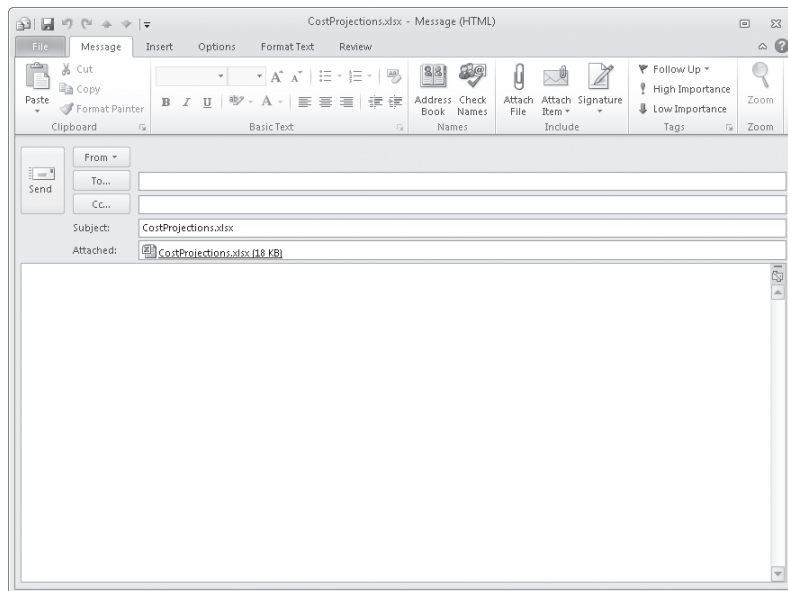
4. Click **OK**.

Excel saves and shares the workbook.

5. Click the **File** tab, click **Save & Send**, and then click **Send Using E-mail**.

6. Click **Send as Attachment**.

A new e-mail message opens with the CostProjections workbook attached.



7. Type an address in the **To** box.

8. Click **Send**.

Your e-mail program sends the message. If Excel had to open your e-mail program to send the message, the program would close at this point.

✖ CLEAN UP Close the CostProjections workbook.

Saving a Workbook for Secure Electronic Distribution

You can create a secure, read-only copy of a workbook for electronic distribution by saving it as a Portable Document Format (PDF) or XML Paper Specification (XPS) file. The controls you use to do so are available on the Save & Send page of the Backstage view.

Tip You can also save a workbook as a PDF or XPS document by clicking the File tab and clicking Save As. Then, in the Save As dialog box, in the Save As Type list, select either PDF or XPS to create a file of the desired type.

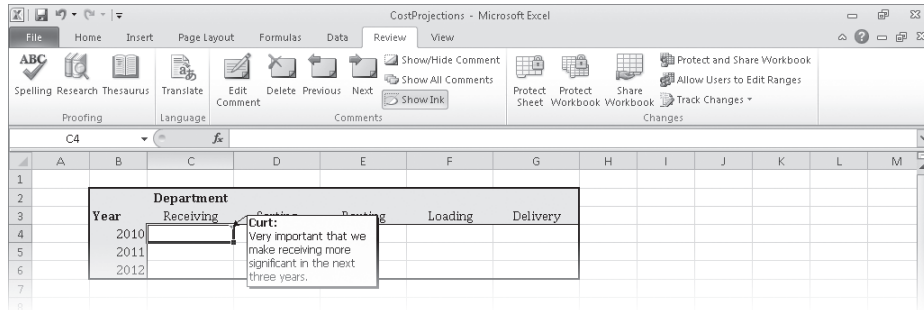
To save a workbook as a PDF or XPS file:

1. Click the File tab, click Save & Send, click Create PDF/XPS Document, and then click the Create PDF/XPS button.
2. In the Publish As PDF Or XPS dialog box, select the file format you want.
3. If you plan to distribute the file online but not print it, click Minimum Size.
4. If you want to specify what portion of the workbook or types of content to publish, click the Options button, make your selections, and then click OK.
5. Click Publish.

Managing Comments

Excel makes it easy for you and your colleagues to insert comments in workbook cells, adding insights that go beyond the cell data. For example, if a regional processing center's package volume is exceptionally high on a particular day, the center's manager can add a comment to the cell in which shipments are recorded for that day, noting that two very large bulk shipments accounted for the disparity.

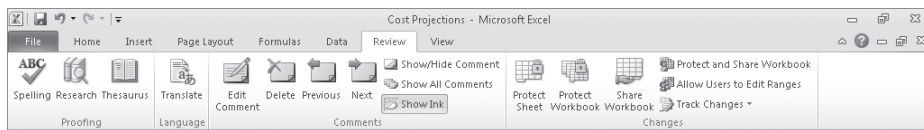
When you add a comment to a cell, a flag appears in the upper-right corner of the cell. When you point to a cell that contains a comment, the comment appears in a box next to the cell, along with the user name of the user who was logged on to the computer on which the comment was created.



Important Note that the name attributed to a comment might not be the same as the name of the person who actually created it. Access controls, such as those that require users to enter account names and passwords when they access a computer, can help track the person who made a comment or change.

You can add a comment to a cell by clicking the cell, clicking the Review tab, and then clicking New Comment. When you do, the comment flag appears in the cell, and a comment box appears next to the cell. You can type the comment in the box and, when you're done, click another cell to close the box. When you point to the cell that contains the comment, the comment appears next to the cell.

If you want a comment to be shown the entire time the workbook is open, click the cell that contains the comment, click the Review tab and then, in the Comments group, click Show/Hide Comment. You can hide the comment by clicking the same button when the comment appears in the workbook, and delete the comment by clicking the Review tab and then, in the Comments group, clicking Delete. Or you can open the comment for editing by clicking Edit Comment in the Comments group.



Troubleshooting The appearance of buttons and groups on the ribbon changes depending on the width of the program window. For information about changing the appearance of the ribbon to match our screen images, see "Modifying the Display of the Ribbon" at the beginning of this book.

Important When someone other than the original user edits a comment, that person's input is marked with the new user's name and is added to the original comment.

You can control whether a cell displays just the comment indicator or the indicator and the comment itself by clicking a cell that contains a comment and then, on the Review tab, clicking the Show/Hide Comment button. Clicking the Show/Hide Comment button again reverses your action. If you've just begun to review a worksheet and want to display all of the comments on the sheet, display the Review tab and click the Show All Comments button. To move through the worksheet's comments one at a time, click the Previous or Next button.

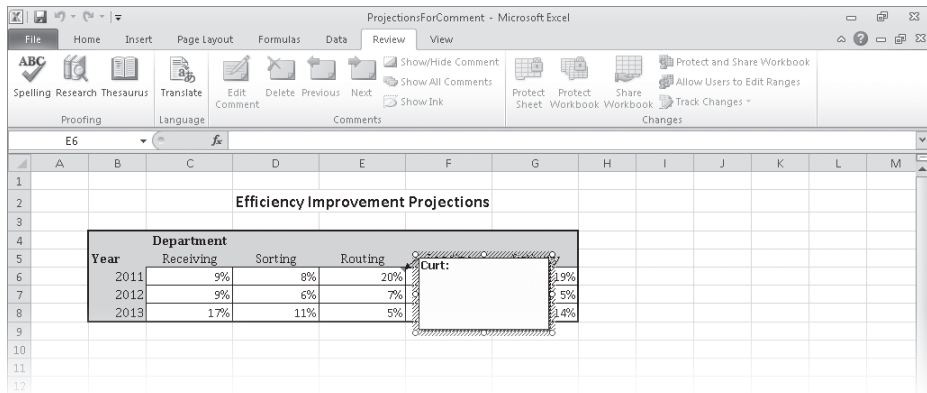
In this exercise, you'll add comments to two cells. You will then highlight the cells that contain comments, review a comment, and delete that comment.



SET UP You need the *ProjectionsForComment_start* workbook located in your *Chapter14 practice file folder* to complete this exercise. Open the *ProjectionsForComment_start* workbook, and save it as *ProjectionsForComment*. Then follow the steps.

1. Click cell **E6**.
2. On the **Review** tab, in the **Comments** group, click **New Comment**.

A red comment flag appears in cell E6, and a comment box appears next to the cell.



3. In the comment box, type **Seems optimistic; move some improvement to the next year?**
4. Click any cell outside the comment box.
The comment box disappears.
5. Click cell **G7**.
6. On the **Review** tab, in the **Comments** group, click **New Comment**.

A red comment flag appears in cell G7, and a comment box appears next to the cell.

7. In the comment box, type **Should see more increase as we integrate new processes.**
8. Click any cell outside the comment box.
The comment box disappears.
9. Click cell **G7**.
10. On the **Review** tab, in the **Comments** group, click **Delete**.
Excel deletes the comment.

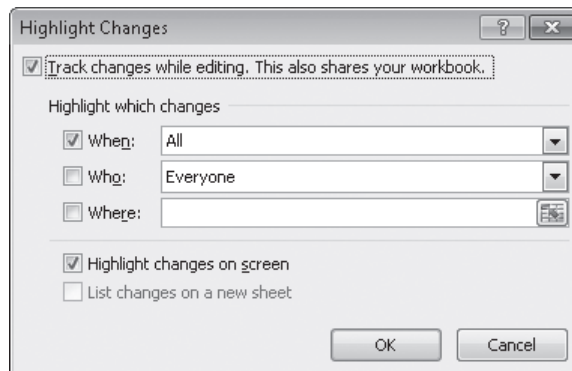


✖ CLEAN UP Save the *ProjectionsForComment* workbook, and then close it.

Tracking and Managing Colleagues' Changes

Whenever you collaborate with your colleagues to produce or edit a document, you should consider tracking the changes each user makes. When you turn on change tracking, any changes made to the workbook are highlighted in a color assigned to the user who made the changes. One benefit of tracking changes is that if you have a question about a change, you can quickly identify who made the change and verify that it is correct. In Excel, you can turn on change tracking in a workbook by clicking the Review tab and then, in the Changes group, clicking Track Changes and then Highlight Changes.

In the Highlight Changes dialog box that opens, select the Track Changes While Editing check box. Selecting this check box saves your workbook, turns on change tracking, and also shares your workbook, enabling more than one user to access the workbook simultaneously.



You can use the commands in the Highlight Changes dialog box to choose which changes to track. Clearing the When, Who, and Where check boxes makes Excel track all changes, whereas selecting a check box and using the commands to specify a time frame, users, or areas of the workbook limits which changes are highlighted. Each user's changes are displayed in a unique color. When you point to a cell that contains a change, the date and time when the change was made and the name of the user who made it appear as a ScreenTip.

After you and your colleagues finish modifying a workbook, anyone with permission to open the workbook can decide which changes to accept and which changes to reject. To start the process, click the Review tab. In the Changes group, click Track Changes, and then click Accept Or Reject Changes. After you clear the message box that indicates Excel will save your workbook, the Select Changes To Accept Or Reject dialog box opens. From the When list, you can choose which changes to review. The default choice is Not Yet Reviewed, but you can also click Since Date to open a dialog box in which you can enter the starting date of changes you want to review. To review all changes in your workbook, clear the When, Who, and Where check boxes.

Tip After you and your colleagues have finished making changes, you should turn off workbook sharing to help ensure that you are the only person able to review the changes and decide which to accept.

When you are ready to accept or reject changes, click OK. The Accept Or Reject Changes dialog box opens and displays the first change, which is described in the body of the dialog box. Clicking the Accept button finalizes the change; clicking the Reject button removes the change, restores the cell to its previous value, and erases any record of the change. Clicking Accept All or Reject All finalizes all changes or restores all cells to their original values, but you should choose one of those options only if you are absolutely certain you are doing the right thing.

Important Clicking the Undo button on the Quick Access Toolbar or pressing Ctrl+Z will not undo the operation.

You can create an itemized record of all changes made since the last time you saved the workbook by adding a History worksheet to your workbook. To add a History worksheet, click Track Changes in the Changes group, and then click Highlight Changes to open the Highlight Changes dialog box. Select the List Changes On A New Sheet check box. When you click OK, a new worksheet named History opens in your workbook. Excel will delete the History worksheet the next time you save your workbook.

In this exercise, you'll turn on change tracking in a workbook, make changes to the workbook, accept the changes, and create a History worksheet.



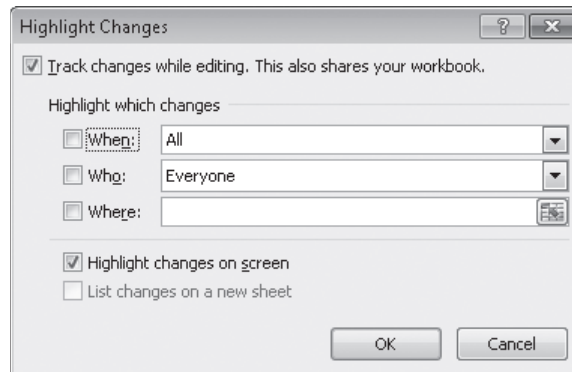
SET UP You need the *ProjectionChangeTracking_start* workbook located in your *Chapter14* practice file folder to complete this exercise. Open the *ProjectionChangeTracking_start* workbook, and save it as *ProjectionChangeTracking*. Then follow the steps.



1. On the **Review** tab, in the **Changes** group, click **Track Changes**, and then click **Highlight Changes**.

The Highlight Changes dialog box opens.

2. Select the **Track changes while editing** check box to activate the **Highlight which changes** area, and clear the **When** check box.



3. Click **OK**.

A message box appears, indicating that Excel will save the workbook.

4. Click **OK**.

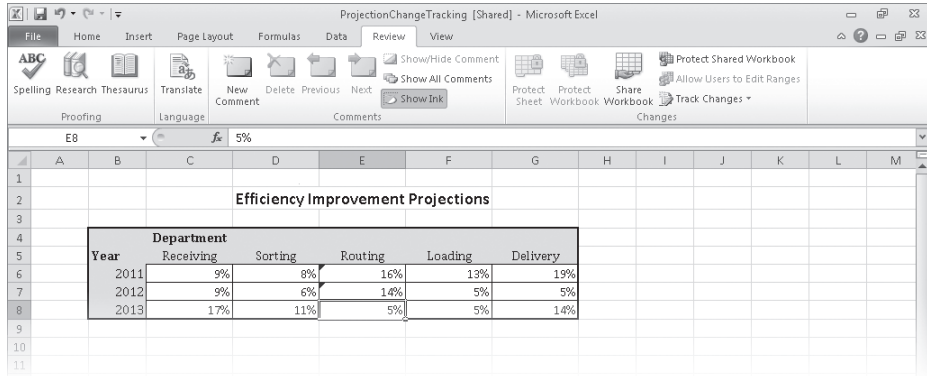
The message box closes. Excel saves the workbook and begins tracking changes.

5. In cell **E6**, type **16%**, and then press Enter.

A blue flag appears in the upper-left corner of cell E6.

6. In cell **E7**, type **14%**, and then press Enter.

A blue flag appears in the upper-left corner of cell E7.

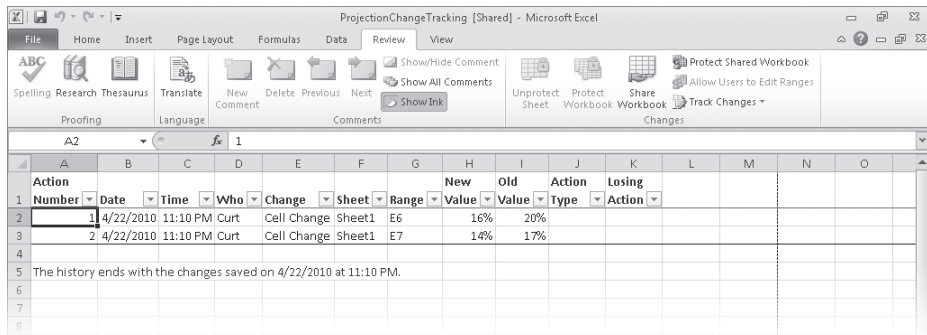


- On the Quick Access Toolbar, click the **Save** button to save your work.
- On the **Review** tab, in the **Changes** group, click **Track Changes**, and then click **Highlight Changes**.

The Highlight Changes dialog box opens.

- Select the **List changes on a new sheet** check box, clear the **When** check box, and then click **OK**.

Excel creates and displays a worksheet named *History*, which contains a list of all changes made since the last time a user accepted or rejected changes.

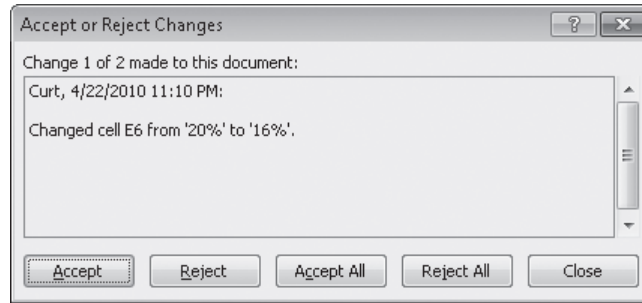


- Click the **Sheet1** sheet tab.
- On the **Review** tab, in the **Changes** group, click **Track Changes**, and then click **Accept/Reject Changes**.

The Select Changes To Accept Or Reject dialog box opens.

- Click **OK**.

The Accept Or Reject Changes dialog box displays the first change.



13. Click **Accept**.

Excel keeps the change and then displays the next change.

14. Click **Accept**.

Excel keeps the change and deletes the History worksheet. The Accept Or Reject Changes dialog box closes.

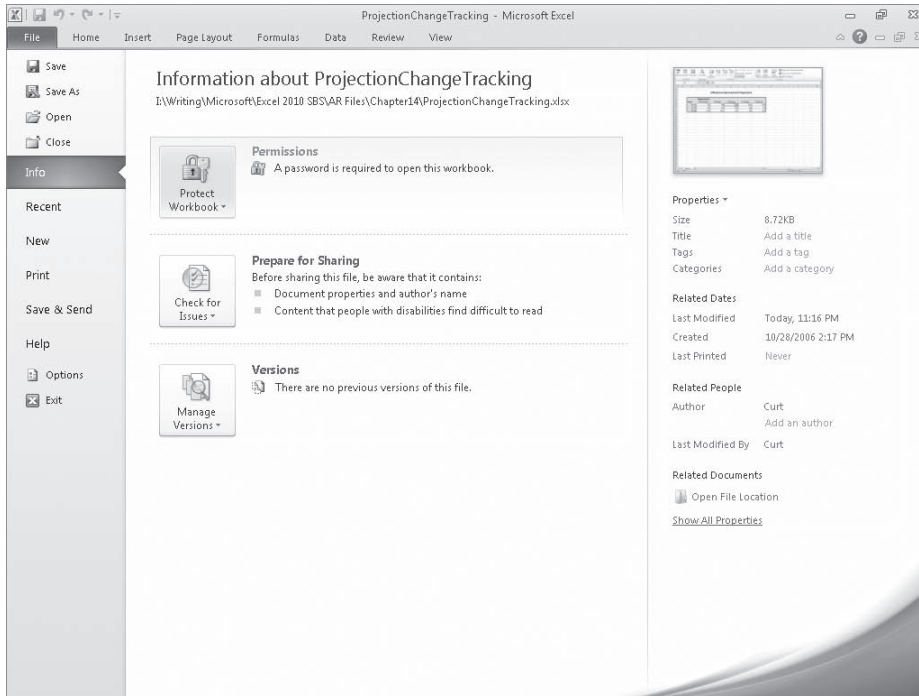
✖ CLEAN UP Save the `ProjectionChangeTracking` workbook, and then close it.

Protecting Workbooks and Worksheets

Excel gives you the ability to share your workbooks over the Web, over a corporate intranet, or by copying files for other users to take on business trips. An important part of sharing files, however, is ensuring that only those users you want to have access to the files can open or modify them. For example, Consolidated Messenger might have a series of computers available in a processing center so supervisors can look up package volumes and handling efficiency information. Although those computers are vital tools for managing the business process, it doesn't help the company to have unauthorized personnel, even those with good intentions, accessing critical workbooks.

You can limit access to your workbooks or elements within workbooks by setting passwords. When you set a password for an Excel workbook, any users who want to access the protected workbook must enter the workbook's password in a dialog box that opens when they try to open the file. If users don't know the password, they cannot open the workbook.

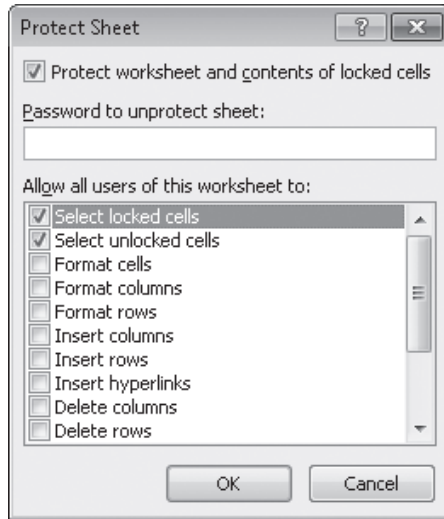
To set a password for a workbook, open the workbook to be protected, and click the File tab to display the workbook in the Backstage view. Then, on the Info page of the Backstage view, click the Protect Workbook button and then click Encrypt With Password. The Encrypt Document dialog box opens, with a Password box in which you can type your password. After you click OK, the Confirm Password dialog box opens, in which you can verify the password required to open the workbook. After you have confirmed the password, click OK. Now the Info page of the Backstage view indicates that users must enter a password to open the file.



To remove the passwords from a workbook, repeat these steps, but delete the passwords from the Encrypt Document dialog box and save the file.

Tip The best passwords are long strings of random characters, but random characters are hard to remember. One good method of creating hard-to-guess passwords is to base your password on a longer phrase. For example, "I learned about passwords in Chapter 14 of *Microsoft Excel 2010 Step by Step*" could translate to the password *IlapiC14oME2SbS*. In any event, avoid dictionary words in English or any other language, because they can be found easily by password-guessing programs available on the Internet; include both uppercase and lowercase letters; and use characters other than letters or numbers if possible.

If you want to allow anyone to open a workbook but want to prevent unauthorized users from editing a worksheet, you can protect a worksheet by displaying that worksheet, clicking the Review tab and then, in the Changes group, clicking Protect Sheet to open the Protect Sheet dialog box.

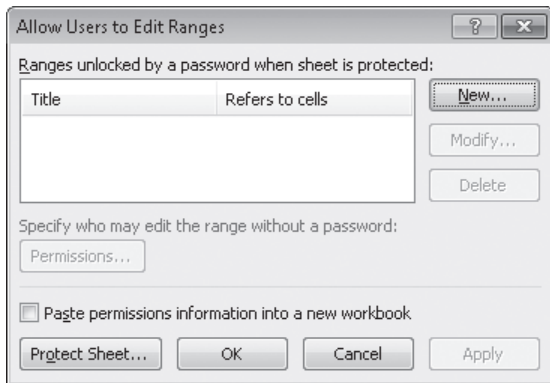


In the Protect Sheet dialog box, you select the Protect Worksheet And Contents Of Locked Cells check box to protect the sheet. You can also set a password that a user must type in before protection can be turned off again and choose which elements of the worksheet a user can change while protection is turned on. To enable a user to change a worksheet element without entering the password, select the check box next to that element's name.

The check box at the top of the worksheet mentions locked cells. A locked cell is a cell that can't be changed when worksheet protection is turned on. You can lock or unlock a cell by right-clicking the cell and clicking Format Cells on the shortcut menu that appears. In the Format Cells dialog box, you click the Protection tab and select the Locked check box.

When worksheet protection is turned on, selecting the Locked check box prevents unauthorized users from changing the contents or formatting of the locked cell, whereas selecting the Hidden check box hides the formulas in the cell. You might want to hide the formula in a cell if you draw sensitive data, such as customer contact information, from another workbook and don't want casual users to see the name of the workbook in a formula.

Finally, you can password-protect a cell range. For example, you might want to let users enter values in most worksheet cells but also want to protect the cells with formulas that perform calculations based on those values. To password-protect a range of cells, select the cells to protect, click the Review tab and then, in the Changes group, click Allow Users To Edit Ranges. The Allow Users To Edit Ranges dialog box opens.



To create a protected range, click the New button to display the New Range dialog box. Type a name for the range in the Title box, and then type a password in the Range Password box. When you click OK, Excel asks you to confirm the password; after you do, click OK in the Confirm Password dialog box and again in the Allow Users To Edit Ranges dialog box to protect the range. Now, whenever users try to edit a cell in the protected range, they are prompted for a password.

Tip Remember that a range of cells can mean just one cell!

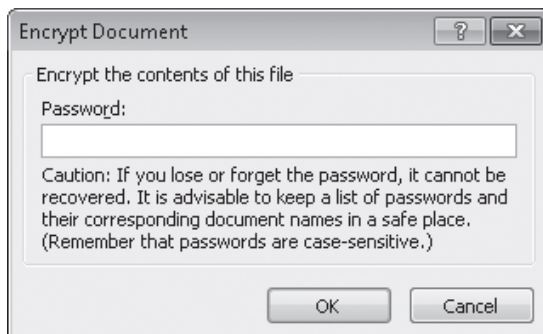
In this exercise, you'll password-protect a workbook, a worksheet, and a range of cells. You will also hide the formula in a cell.



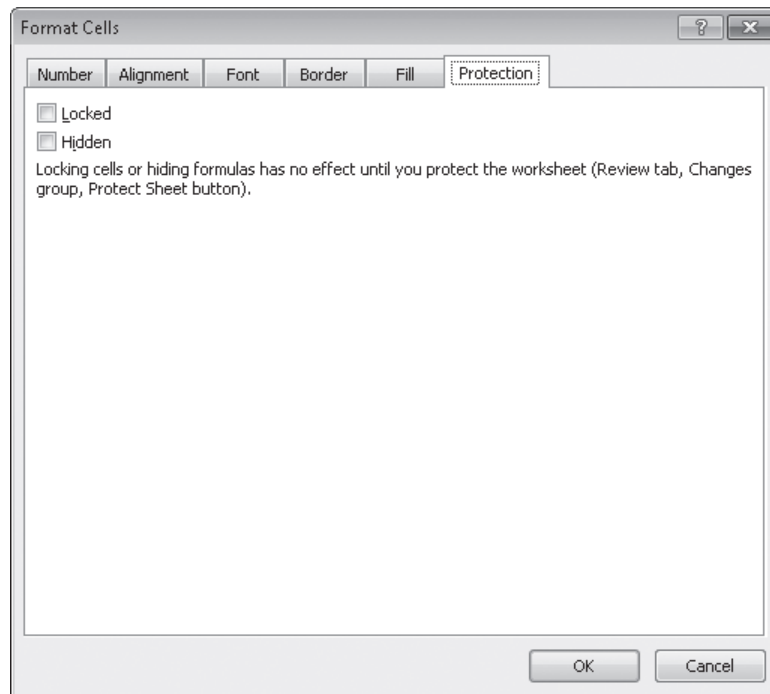
SET UP You need the *SecureInfo_start* workbook located in your Chapter14 practice file folder to complete this exercise. Open the *SecureInfo_start* workbook, and save it as *SecureInfo*. Then follow the steps.

1. Click the **File** tab, and then, if necessary, click **Info**.
The Info page of the Backstage view is displayed.
2. Click the **Protect Workbook** button, and then click **Encrypt with Password**.

The Encrypt Document dialog box opens.



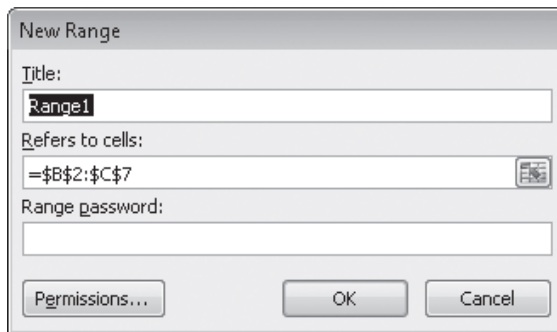
3. Type **work14pro** in the **Password** box.
4. Click **OK**.
The Confirm Password dialog box opens.
5. In the **Reenter password** box, type **work14pro**.
6. Click **OK**.
The Confirm Password dialog box closes.
7. Click the **Review** tab of the ribbon and, if necessary, click the **Performance** sheet tab.
The Performance worksheet opens.
8. Right-click cell **B8**, and then click **Format Cells**.
The Format Cells dialog box opens.
9. Click the **Protection** tab.
The Protection page is displayed.



10. Select the **Hidden** and **Locked** check boxes, and then click **OK**.
Excel formats cell B8 so that it won't display its formula after you protect the worksheet.



11. On the **Review** tab, in the **Changes** group, click **Protect Sheet**.
The Protect Sheet dialog box opens.
12. In the **Password to unprotect sheet** box, type **prot300pswd**.
13. Clear the **Select locked cells** and **Select unlocked cells** check boxes, and then click **OK**.
The Confirm Password dialog box opens.
14. In the **Reenter password to proceed** box, type **prot300pswd**, and then click **OK**.
15. Click the **Weights** sheet tab.
The Weights worksheet opens.
16. Select the cell range **B2:C7**.
17. On the **Review** tab, in the **Changes** group, click **Allow Users to Edit Ranges**.
The Allow Users To Edit Ranges dialog box opens.
18. Click **New**.
The New Range dialog box opens, with the range B2:C7 displayed in the Refers To Cells box.



19. In the **Title** box, type **AllWeights**.
20. In the **Range password** box, type **work14pro**, and then click **OK**.
21. In the **Confirm Password** dialog box, reenter the password **work14pro**.
The range appears in the Allow Users To Edit Ranges box.
22. Click **Protect Sheet**.
The Protect Sheet dialog box opens.
23. In the **Password to unprotect sheet** box, type **work14pro**, and then click **OK**.
24. In the **Confirm Password** dialog box, reenter the password **work14pro**, and then click **OK**.

✖ CLEAN UP Save the SecureInfo workbook, and then close it.

Finalizing a Workbook

Distributing a workbook to other users carries many risks, not the least of which is the possibility that the workbook might contain private information you don't want to share with users outside your organization. With Excel, you can inspect a workbook for information you might not want to distribute to other people, and create a read-only final version that prevents other people from making changes to the workbook content.

Using the Document Inspector, you can quickly locate comments and annotations, document properties and personal information, custom XML data, headers and footers, hidden rows and columns, hidden worksheets, and invisible content. You can then easily remove any hidden or personal information that the Document Inspector finds.

To inspect and remove hidden or personal information, follow these steps:

1. Save the file.
2. Click the File tab, and then, on the Info page of the Backstage view, click Check for Issues, and then click Inspect Document.
3. In the Document Inspector window, clear the check box of any content type you want to remain in the document, and click Inspect.
4. In the inspection results list, click the Remove All button to the right of any category of data you want to remove.

Marking a workbook as final sets the status property to Final and turns off data entry, editing commands, and proofreading marks.

To mark a workbook as final, follow these steps:

1. Click the File tab, and then, on the Info page of the Backstage view, click Protect Workbook, and then click Mark as Final.
2. In the message box indicating that the file will be marked as final and then saved, click OK.
3. In the message box indicating that the file has been marked as final, click OK.

To restore functionality to a workbook that has been marked as final, click the File tab and then, on the Info page of the Backstage view, click Protect Workbook, and then click Mark As Final to change its status.

Authenticating Workbooks

The unfortunate reality of exchanging files over networks, especially over the Internet, is that you need to be sure you know the origin of the files you're working with. One way an organization can guard against files with viruses or substitute data is to authenticate every workbook using a digital signature. A digital signature is a character string created by combining a user's unique secret digital signature file mathematically with the contents of the workbook, which programs such as Excel can recognize and use to verify the identity of the user who signed the file. A good analogy for a digital signature is a wax seal, which was used for thousands of years to verify the integrity and origin of a document.

Tip The technical details of and procedure for managing digital certificates are beyond the scope of this book, but your network administrator should be able to create a digital certificate for you. You can also directly purchase a digital signature from a third party, which can usually be renewed annually for a small fee. For the purposes of this book, you'll use the selfcert.exe Microsoft Office accessory program to generate a certificate with which to perform the exercise at the end of this topic. This type of certificate is useful for certifying a document as part of a demonstration, but other users will not accept it as a valid certificate to verify that the contents of the document haven't changed since it was signed.

To create a digital certificate that you can use as a demonstration, open the Start menu, click All Programs, click Microsoft Office, click Microsoft Office 2010 Tools, and then click Digital Certificate For VBA Projects. In the Create Digital Certificate dialog box, type a name for your certificate and click OK to have the program create your trial certificate. Then, in Excel, click the File tab and on the Info page of the Backstage view, click Protect Workbook and then click Add A Digital Signature. In the Sign dialog box, type your purpose for signing the document, and then click Sign to sign your workbook.

Tip After you click Add A Digital Signature, Excel displays a dialog box, indicating that you can buy digital signatures from third-party providers. To get information about those services, click the Signature Services From The Office Marketplace button. To bypass the message, click OK; to prevent the dialog box from appearing again, select the Don't Show This Message Again check box, and then click OK.

If you have several certificates from which to choose, and the desired certificate doesn't appear in the Sign dialog box, you can click Change to display the Select Certificate dialog box. In the Select Certificate dialog box, click the certificate with which you want to sign the workbook, and then click OK. The Select Certificate dialog box closes, and the certificate with which you signed the workbook appears in the Sign dialog box. As before, click Sign to sign your document by using the digital certificate.

In this exercise, you'll create a digital certificate and digitally sign a workbook by using the certificate.



SET UP You need the *ProjectionsSigned_start* workbook located in your Chapter14 practice file folder to complete this exercise. Open the *ProjectionsSigned_start* workbook, and save it as *ProjectionsSigned*. Then follow the steps.



1. On the **Start** menu, click **All Programs**, click **Microsoft Office**, click **Microsoft Office 2010 Tools**, and then click **Digital Certificate for VBA Projects**.

The Create Digital Certificate dialog box opens.

2. In the **Your certificate's name** box, type **Excel2010SBS**, and then click **OK**.
3. Click **OK**.

A message box indicates that the program created your certificate successfully.

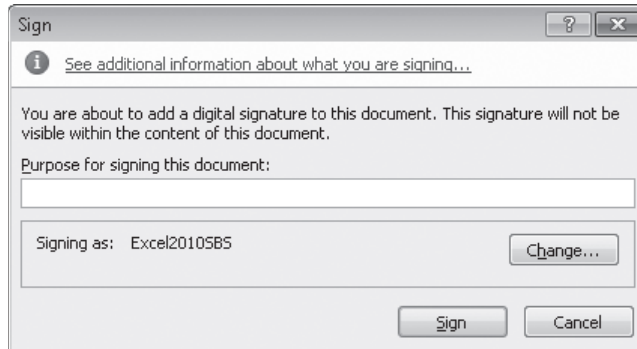
The message box closes.

4. Click the **File** tab and then, if necessary, click **Info**. Click **Protect Workbook** and then click **Add a Digital Signature**.

A message box appears, offering the opportunity to view signature services on Office Marketplace.

5. Click **OK**.

The message box closes, and the Sign dialog box opens.



6. In the **Purpose for signing this document** box, type **Testing**.
7. Verify that the **Excel2010SBS** certificate appears in the **Signing as** area of the dialog box, and then click **Sign**.

The Signature Confirmation dialog box opens.

8. Click **OK**.

The Signatures task pane opens and the workbook is marked as final. If you edit the workbook, it will invalidate the digital signature, which is based on the workbook's contents at the time you signed it.



CLEAN UP Save the *ProjectionsSigned* workbook, and then close it.

Saving Workbooks for the Web

With Excel, you can save your workbooks as Web documents, so you and your colleagues can view workbooks over the Internet or an organization's intranet. For a document to be viewable on the Web, it must be saved as a Hypertext Markup Language (HTML) file. HTML files, which end with either the *.htm* or the *.html* extension, include tags that tell a Web browser such as Windows Internet Explorer how to display the contents of the file.

For example, you might want to set the data labels in a workbook apart from the rest of the data by having the labels displayed with bold text. The coding in an HTML file that indicates text to be displayed as bold text is `...`, where the ellipsis between the tags is replaced by the text to be displayed. So the following HTML fragment would be displayed as **Excel** in a Web page:

```
<b>Excel</b>
```

You can create HTML files in Excel by clicking the File tab and clicking Save As to display the Save As dialog box. To save a workbook as an HTML file, click the Save As Type arrow and then click Web Page. Then, in the Save As dialog box, select the Entire Workbook option, type a name for the file in the File Name box, and click Save to have Excel create an HTML document for each sheet in the workbook.

Tip If the only sheet in your workbook that contains data is the one displayed when you save the workbook as a Web page, Excel only saves that worksheet as a Web page.

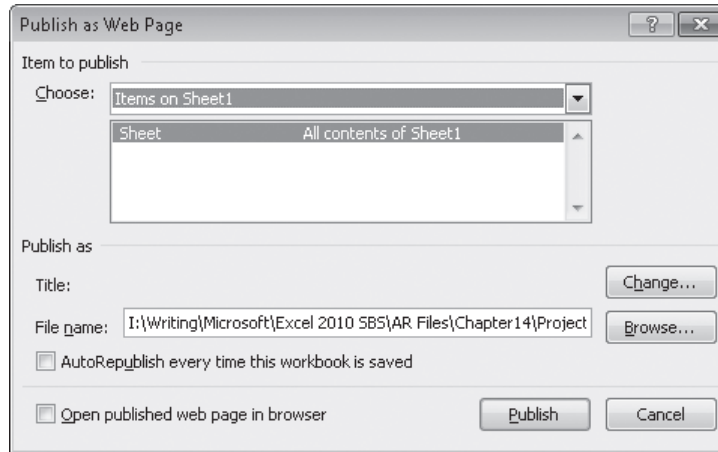
After you save an Excel workbook as a set of HTML documents, you can open it in your Web browser. To open the Excel file, start Internet Explorer, and then click Open on the File menu to display the Open dialog box. In the Open dialog box, click the Browse button to open the Windows Internet Explorer dialog box. You can use the commands in that dialog box to identify the file you want to open.

When you double-click the file you want to open, the Windows Internet Explorer dialog box closes and the file's name and path appear in the Open box. To display the Excel workbook, click OK, and the workbook appears in Internet Explorer. You can move among the workbook's worksheets by clicking the sheet tabs in the lower-left corner of the page.

Saving a workbook to an organization's intranet site enables you to share data with your colleagues. For example, Consolidated Messenger's chief operating officer, Lori Penor, could save a daily report on package misdeliveries to her team's intranet so that everyone could examine what happened, where the problem occurred, and how to fix the problem. It's also possible to save a workbook as a Web file that retains a link to the

original workbook. Whenever someone updates the workbook, Excel updates the Web files to reflect the new content.

To publish a workbook to the Web, click the File tab, click Save As and then, in the Save As Type list, click Web Page. When you do, Excel displays the Publish button; clicking the Publish button displays the Publish As Web Page dialog box.



You can use the options in the Publish As Web Page dialog box to select which elements of your workbook you want to publish to the Web. Clicking the Choose arrow displays a list of publishable items, including the option to publish the entire workbook, items on specific sheets, or a range of cells. To have Excel update the Web page whenever someone updates the source workbook, select the AutoRepublish Every Time This Workbook Is Saved check box. You can also specify which text appears on the Web page's title bar. To do so, click the Change button, type the page title in the Set Title dialog box, and click OK. When you save a workbook that has AutoRepublish turned on, Excel displays a dialog box indicating that the changes will update the associated Web file.

Important When you save a PivotTable to the Web, the PivotTable doesn't retain its interactivity. Instead, Excel publishes a static image of the PivotTable's current configuration.

In this exercise, you'll save a workbook as a Web page and then publish a worksheet's PivotTable to the Web.



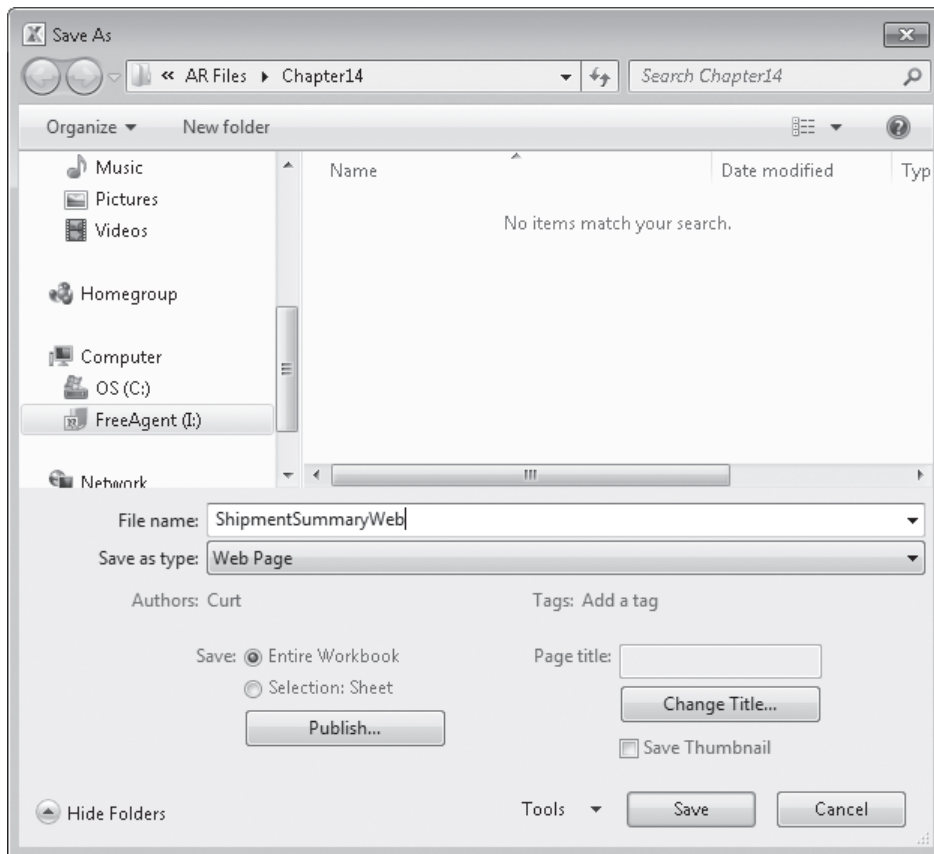
SET UP You need the *ShipmentSummary_start* workbook located in your Chapter14 practice file folder to complete this exercise. Open the *ShipmentSummary_start* workbook, and save it as *ShipmentSummary*. Then follow the steps.

1. Click the **File** tab, and then click **Save As**.

The Save As dialog box opens.

2. In the **File name** box, type **ShipmentSummaryWeb**.
3. In the **Save as type** list, click **Web Page**.

The Save As dialog box changes to reflect the Web Page file type.



4. Click **Save**.

A warning message box appears, indicating that the workbook might contain elements that can't be saved in a Web page.

5. Click **Yes** to save the workbook as a Web file.

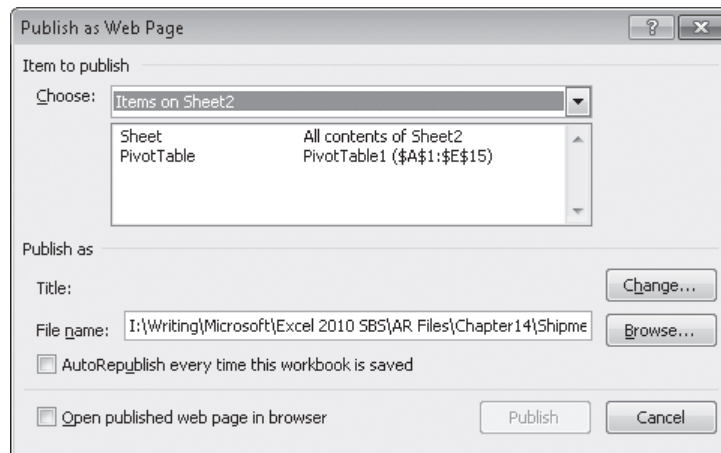
The message box closes, and Excel saves the workbook as a Web page.

6. Click the **File** tab, and then click **Close**.

7. Click the **File** tab, click **Recent**, and then, in the list of recently viewed files, click **ShipmentSummary**.

The ShipmentSummary workbook opens.

8. Click the **File** tab, and then click **Save As**.
The Save As dialog box opens.
9. In the **File name** box, type **ShipmentSummaryPublish**.
10. In the **Save as type** list, click **Web Page**.
The Save As dialog box changes to reflect the Web Page file type.
11. Click **Publish**.
The Publish As Web Page dialog box opens.
12. In the **Choose** list, click **Items on Sheet2**.
The available items on Sheet2 appear.



13. In the **Item to publish** list, click **PivotTable**.
14. Select the **AutoRepublish every time this workbook is saved** check box.
15. Click **Publish**.

Excel publishes the PivotTable to a Web page. Excel will update the contents of the Web page whenever a user saves the ShipmentSummary workbook.

✖ CLEAN UP Save the ShipmentSummary workbook, and then close it. Exit Excel.

Key Points

- Sharing a workbook enables more than one user to view and edit the data at one time, which is useful in group projects in which each member has a distinct area of responsibility.
- Sending files by e-mail is a very efficient means of collaborating with colleagues.
- Adding comments to cells is a quick way to let your colleagues know what you're thinking without taking up valuable space in a cell.
- Tracking changes is vital when you share responsibility for a workbook with several other people.
- When your workbook's data is too important to leave lying around in the open, use passwords to protect all or part of the file!
- Authenticating workbooks with digital signatures helps to identify the source of your files, so you won't have to guess about the origins of that next attachment in your e-mail inbox.
- Saving a workbook as a Web-accessible HTML document is as easy as saving it as a regular Excel file, and opening a workbook saved for the Web is just as easy as opening any other Web page.
- Use the AutoRepublish facility to update Excel files on the Web. Whenever anyone changes the original workbook, Excel writes the edits to the HTML version of the file.