

Securing Access to Your Documents

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You can save a Microsoft Office 2010 or Office for Mac 2011 document with a password or set a document as read-only. But security options today are far more sophisticated, with better protection and more options. Following is a brief summary of options available to help secure your content in Word, PowerPoint, and Excel.

Setting Passwords

If you want to stick with the basics, you can require a password to open or edit any Office 2010 or Office 2011 Word, PowerPoint, or Excel document. If your document contains national security secrets, this is not likely a sufficient solution. But for the typical document, requiring a password to open encrypts your content and provides a respectable amount of protection.

Note Password-protection is new to PowerPoint for Mac in Office 2011 Service Pack 1.

Why specify requiring a password to open rather than to edit? If someone can see your content, they can access it—one way or another. For example, in Word and Excel on both platforms, others without your password can copy content out of a document that is protected only by a password to edit. And even though others can't copy content out of a read-only PowerPoint file, they can begin to gain more access than you might have intended to that content by taking a screenshot or printing it. So password-protected editing is reasonable protection for sharing documents that you don't want edited with others who have good intentions.

When you require a password to open the file, the contents are encrypted. So, if someone attempts to open the file in a text editor, for example—or to open the Office Open XML document package—they will only find encrypted data.

To access these protection options, do the following:

- In the Office 2010 versions of Word, PowerPoint, or Excel, click File and then click Save As. In the Save As dialog box, click Tools and then click General Options.
- In Word for Mac 2011, on the Word menu, click Preferences and then click Security.
- In PowerPoint for Mac 2011 and Excel for Mac 2011, on the Review tab, click Passwords.

Note If you are in an organization running Office 2010 Professional Plus edition or Office 2011 volume license edition, you may have an additional, higher-security alternative for restricting access to your documents. See “Restricting Access to Your Documents” later in this article for more information.

Protecting Documents from Editing

Using protection features in Word and Excel, you can protect all or part of a document from editing.

Using the Mark As Final Feature in Office 2010

The Mark As Final feature available in the Office 2010 programs Word, Excel, and PowerPoint sets the Status document property value to Final and protects the document from any type of editing. Note, however, that this is intended for use by those collaborating on a document and not as a security feature. Password protection is not available for Mark As Final, so any recipient of your document can turn off this feature. To turn on Mark As Final, under the Microsoft Office Button point to Prepare and then click Mark As Final.

Note If you see Permission, Restrict Permission, or Restrict Permission by People, these are Information Rights Management (IRM) tools—enterprise-level document security—available in the Office 2010 Professional Plus and Office 2011 volume license editions. Learn more about these later in this article.

Protecting a Word Document

Protection options in Word 2010 and Word 2011 are not quite the same. In Word 2010, you have options for protecting any portion of the document; in Word 2011, you can protect an entire document or specify document sections.

Note When using co-authoring to simultaneously edit Word 2010 or Word 2011 documents with others, you can use the Block Authors command to protect specific parts of the document from editing by other authors. See Chapter 2, “Collaborating and Sharing When and Where You Choose” to learn about co-authoring in Word 2010 and Word 2011.

Protect a Word 2010 Document

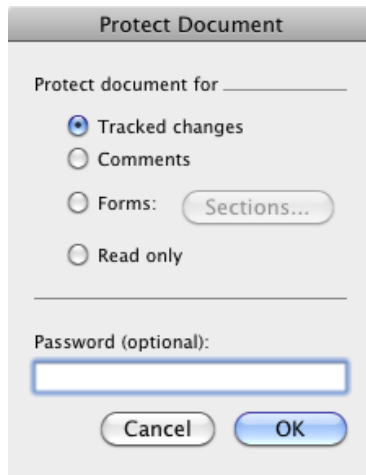
On the Review tab, click Protect Document, and then click Restrict Editing to open the Restrict Formatting And Editing task pane. Here you can restrict formatting as well as editing of the document, and apply password protection to either. Additionally, when you select No Changes or Comments as the type of editing restriction, you can allow all or just specified users to freely edit selected portions of the document.

Learn more about using document protection in Chapter 12, “Dynamic Content,” and Chapter 22, “The Many Faces of Microsoft Office Templates.”

Additionally, when creating documents or templates that include content controls, you can group controls to protect that portion of the document from editing other than within content controls. This option doesn’t offer password protection, so it is not truly a security option, but it can be a handy way to protect forms for ease of use by others. Learn more about grouping controls in Chapter 12.

Protect a Word 2011 Document

On the Tools menu, click Protect Document. In the Protect Document dialog box, shown here, you can protect the document for tracked changes or comments, or can set the document to allow only editing of forms or no editing at all (read only). If the document contains more than one section, the Sections command becomes available and you can specify sections to protect.



Protecting an Excel Document

On the Review tab, you have options to Protect Sheet, Protect Workbook, and (in Word 2010) Allow Users To Edit Ranges, including password protection for each of these options.

- When you select the Protect Sheet option, you are protecting the active sheet only. In the Protect Sheet dialog box, you can specify a range of permissions, such as selecting cells, editing cells, or inserting or deleting rows or columns.

Note To enable editing for certain cells when a sheet is protected, unlock the cells in which you want to allow editing. To do this, select the cells to unlock, then right click the selection and click Format Cells. On the Protection tab, clear the Lock selection. (In Excel 2010, you can also toggle the Lock Cells command on or off on the Home tab, in the Cells group, under Format.)

- When you select Protect Workbook and then select Protect Structure And Windows, you restrict the ability to make changes to the workbook, such as hiding or renaming sheets. The Protect Structure And Windows dialog box gives you the option to protect either or both structure and windows.
- With Allow Users To Edit Ranges, you can assign editing permission for just part of a worksheet to specific users, or apply a unique password for editing cells in the selected range.

Restricting Permission to Your Documents

As mentioned earlier, if you use the Professional Plus edition of Office 2010 or the Volume License edition of Office 2011, you may be able to use Information Rights Management (IRM) to allow only specified individuals to access a document. Using IRM, you can assign unique rights to each user, including restricting the ability to copy, print, forward, modify, or fax a document. You can even set an expiration date after which users cannot access a document.

Note While a document protected with IRM is open, the Microsoft Windows print screen capability and the Microsoft Office OneNote screen clipping feature are disabled for all open windows, if the user does not have permission to copy the document. However, users may be able to take a screen capture of a restricted document using third-party screen capture programs or even a digital camera.

Using IRM in your company does require additional components that can be setup by your system administrator. So, if you see IRM options discussed in this section but don't appear to have access to them, check with your Information Technology department.

If you're using Office 2010 Professional Plus in a standalone environment, you will be prompted to install and set up the Windows Rights Management client the first time you attempt to restrict a document or open a restricted document to which you have been granted permission.

Securing Access to Your Documents

In both Office 2010 and Office 2011, you will be prompted to enter your credentials when you attempt to restrict a document or open a restricted document. If IRM has been set up by a system administrator, these credentials are usually the same as your network credentials.

To restrict permission to a document, do the following:

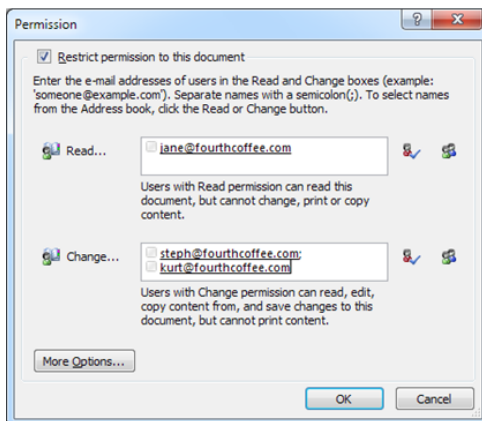
1. In Office 2010, click the File tab, click Info, and then click Protect Document. Point to Restrict Permission by People and then click Restricted Access.

In Office 2011, on the Review tab, in the Protection group, click Permissions and then click Restricted Access.

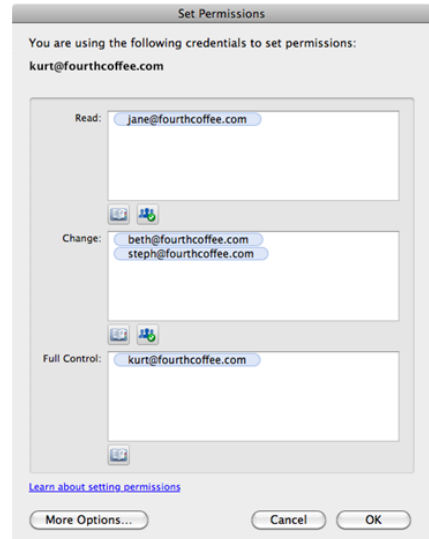
2. Verify your credentials if prompted. The Permission dialog box (Set Permissions in Office 2011) will open, as you see here.

In the Office 2010 Permission dialog box, click Restrict Permission To This Document.

Word 2010



Word 2011



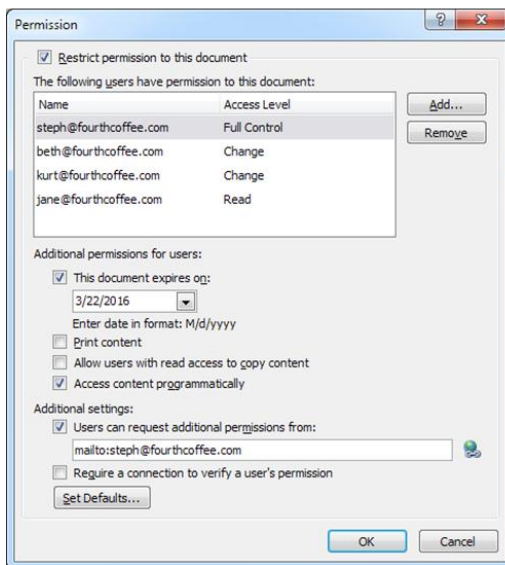
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3. In either Office 2010 or Office 2011, in the Read and Change boxes, add e-mail addresses for those to whom you want to grant permission. Note that you can also select user names from your Address Book in this dialog box.

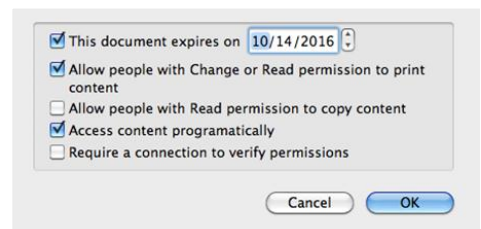
In Office 2011, notice that you have the option to grant full control from this dialog box as well. In Office 2010, enter addresses of users to whom you want to grant full control of a document in either the Read or Change box. You will have the opportunity to change permission in the next step.

4. To customize permissions, click More Options. In this dialog box, you can change permission levels and add further options to permissions—such as setting an expiration date or allowing printing. In Office 2010, note that items listed under the heading Additional Permissions are granted for all authorized users of a document and can't be set by an individual.

Word 2010



Word 2011



In Office 2010, to change permission for an individual, select their name in the list. A dropdown list becomes available under the Access Level heading.

Securing Access to Your Documents

Note When IRM is applied to a document, the document content is encrypted. So, if a recipient attempts to open the file in a text editor (such as Microsoft Notepad) to view or extract content, they might see some file properties information (such as the author's name), but the document content will be unreadable.