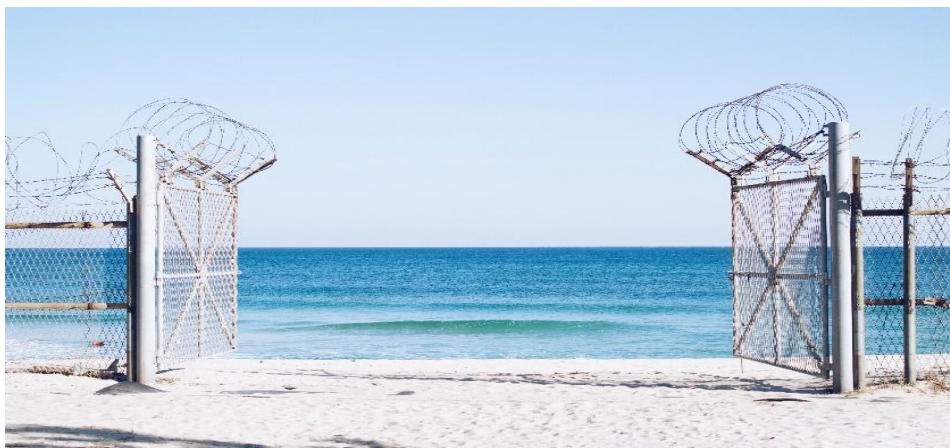


5 STRATEGIES FOR PROTECTING YOUR EXCEL WORKBOOK



Dear Reader,

Thank you for your interest in this short summary about Excel protections.

You might be reading this, because you are a heavy Excel user and want a better safety-net for your work. Or you might have had bad experiences in spite of using certain safeguards already. Or you simply want to learn more.

You might be in a managing role and you want to better assist your team and help them to use Excel even better.

In any case, it is very important to understand what is possible and what is useful – when it comes to guarding your Excel work.

Thank you again for your trust and commitment.

Please reach out to me if you have any questions.

My name is **Jürgen Schmechel** – basically a business strategist. But I am known for creating clever Excel solutions for my clients that transform the way people work – using their existing software tools.



Reasons for wanting to protect your work:

- 🔍 You want to make sure no-one is overwriting your complex formulas.
 - 🔍 You fear someone would steal your IP or data...
 - 🔍 You want to prevent that your program is copied and pasted all over the internet
-

So, how then do you protect your Excel file?

Every now and then my clients ask me,
"Jürgen, what is the most effective way to protect your data and IP in Excel?"

And the short answer is, *"you just don't..."*

Let me explain...

There are two aspects here to think through: **How** and **Why**
How you are going to protect your workbook and why would you want to do it.

Let's first talk about the How.

There are a couple of options here.

- I) You could simply highlight all the cells which allow for data-entry in a specific colour (e.g. I use Light Yellow).
This would signal to the educated user, please enter data here, everything else are formulas and you'd better not touch them.
- II) You could use the sheet protection that Excel has to offer.
It is a bit clumsy, but once you get the hang of it, it's not complicated. With this protection in place no user can touch any cell that is labelled as "locked" (see cell-formatting / protection).
I'd still recommend highlighting those cells, which are open, to avoid frustrations by the user.
- III) As addition to the second option above, you could activate the workbook protection on top to even further prevent any normal user to hack into your data and read more than they should.

- IV) If you are inclined to using the - Excel internal - macro language (called VBA) – like I do all the time - you could also protect the project with a password that prevents any user from seeing your code and being able to make changes to your programming.
And even without programming any VBA-code this option allows you to make sheets permanently hidden. Only user with the correct password can then make those sheets visible.

You know what all these options I) to IV) have in common: **they are not impenetrable.**



It only takes a few searches on the internet and you'd find free tools for download to overcome these simple barriers.

There is an even more unknown trick to *outsmart* all of the above, but I'm not sharing this here publicly...(sorry :-)

In fact I have been asked to help clients to get back into their own Excel file, because they'd forgotten the password to unlock the protection.

And as long as my clients can prove that these files are actually theirs or that they have the legal rights to access them, I'm happy to help.

Now, there is indeed a **fifth** option, which most people never heard of:

- V) You can make Excel work with **encrypted** data and separate the data-tables from the actual calculations within Excel.
The advantage with this is, that even though it looks like a normal Excel file, no one can read the data without having access to the *Decrypting* code.
Of course there is also a big (or small) disadvantage:
The access of the data takes longer – especially when loading or saving back.

In a case study where I was using this procedure for a client with 500,000 records the decrypting took 60 seconds whereas the encrypting took 90 seconds.
It could be worth the effort, but it might not be practical all the time.

Let's now look again at why you might want to protect your data/IP?

Remember these are the most typical reasons:

- 🔍 You want to make sure no-one is overwriting your complex formulas
- 🔍 You fear someone would steal your IP or data
- 🔍 You want to prevent that your program is copied and pasted all over the internet

If the **first one** is your reason for implementing some protection on your worksheet, then that is totally valid and makes sense. Still there are some words of caution though. Once you haven't used your Excel file for three months, chances are that you also forgot the precious password that might get you back in.

So what do you do to prevent this? *(and we've all been there done this)*

You write down the password on a piece of paper and eventually you even give this password to the person working with the sheet all the time. Which means you might as well don't have a protection and password in the first place.

Remember within Excel there is no "*Forgot your password*" function. I've seen clients coming to me in desperation, because they've lost their password.

When your *why* is motivated by reason **two** or **three** then I must tell you that if someone really, I mean r-e-a-l-l-y(!) wants to steal your IP or your precious program they will do so and you probably won't succeed in preventing it from happening.

In my humble opinion I think you should make the operation of your Excel workbook **as smooth as possible for the honest user** and not try to build fences for the very few that might or might not try to steal from you.

We all put up with the enormous security measures around airports when we simply want to fly from Sydney to Melbourne or back just because there is a one in a million chance that someone is trying to hijack that plane.

I've mentioned earlier the protection by using encrypted data. Again, if someone really wants to hack into your system and into your data they will do so.

Making things difficult for you and your users only increases the challenge and the thrill for the dishonest ones. The higher the walls you build, the more ambitious some become to climb over it. It's like a sporting competition.



Maybe now you understand my answer
...to the typical question "*how do I protect my Excel file?*" ...

you don't

More than happy to talk with you about your specific situation, because everyone and every situation is different.

Please book a free 30-minute phone-conversation with me using this [link](#).

About the author...

When accuracy in your reporting is crucial, it is imperative to work with a business strategist that has a mind for numbers and systems.



Jürgen Schmechel has over 36 years of experience in business strategy, workflow, analytics, and software development working with organisations in Europe and Australia.

Clients rave about his ability to solve complex problems breaking them down into simple modules. He is known for creating clever Excel solutions that transform the way people work – using their existing software tools.

Jürgen holds a Master's Degree in Mathematics and Economics and uses his German precision to improve the productivity of his clients by 10% or more. He creates solutions that work and produces the insights needed for effective decision making.

Among Jürgen's clients are companies like Stryker, AMP, SBS, BMW, Mobil Oil, Rodenstock, Employsure and Fisher & Paykal.

Clients describe him as a game changer.

David Barton - Club Plus Super

The changes Jürgen made have resulted in a substantial time saving and improved the reliability of our process allowing us to focus on the analysis rather than the collation and manipulation of data. Jürgen isn't just an Excel guy but really understand process flows and the business outcomes.

Ryan McCarthy - Stryker SSP

Excel is incredibly powerful. Powerful enough to ruin decision making or empower decision making. Jürgen helped change how excel is used for us, I shiver with dread thinking about pre-Jurgen excel. Wish I had called him years earlier." -

Contact:

Jürgen Schmechel (M. Math – Econ)

(m) [0415509275](tel:0415509275)

(e) jurgen@schmechel.com

(w) <https://schmechel.com>

(li) <https://www.linkedin.com/in/jurgenschmechel/>