

HOW TO PROTECT FILES IN 365

There are 3 ways to protect your files:

1. Setting appropriate access level to the appropriate audience (group or private)
2. Setting a password for the file
3. Using Sensitivity labels in Outlook or Online 365 apps (Word/Excel/Powerpoint)

There are several factors to consider here before you make a decision on how to protect a file:

- Who is the intended recipient(s)?
- What do they need to do with the file?
- Do they need a permanent or temporary access to the file?
- Are they inside or outside of organisation?
- Are different types of access needed for different cohorts?

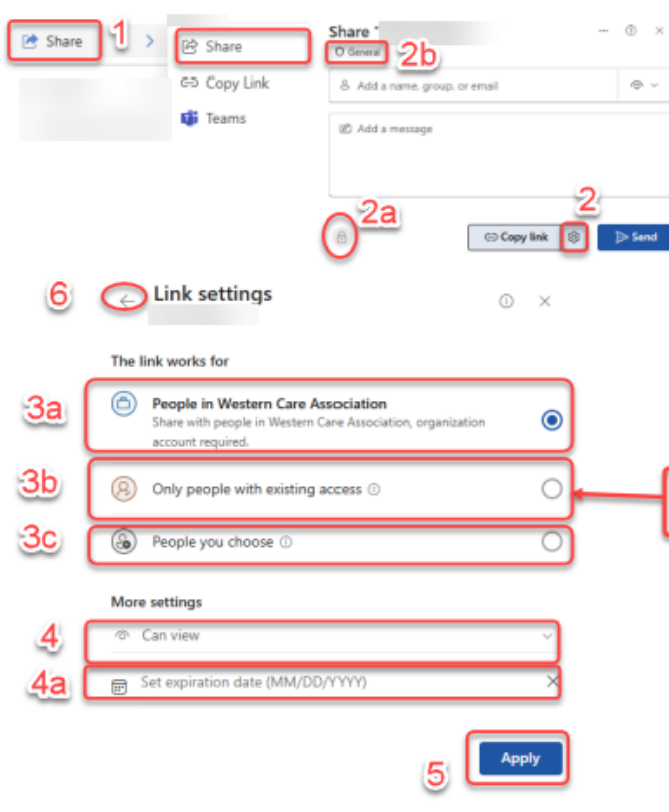
All these factors will determine how you will share, protect and grant access to files across 365 with people.

IMPORTANT: individual access will override the group/organisation access

(for instance, if a link was shared with anyone in WCA with View only access, and you gave Joe Bloggs "Edit" access, he will be able to edit the file, whereas everyone else will only be able to view it)

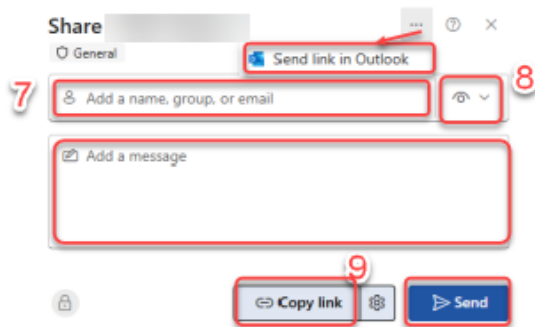
1. How to set access to a file

From any view in OneDrive/My Files and or MS Teams where you can see a **Share** icon -



The screenshot shows the 'Share' dialog box in Microsoft 365. It includes fields for 'Add a name, group, or email', 'Add a message', and buttons for 'Copy link', 'Send', and 'Link settings'. The 'Link settings' window is open, showing options for 'The link works for' (People in Western Care Association, Only people with existing access, People you choose) and 'More settings' (Can view, Set expiration date). The 'Apply' button is at the bottom.

1. Click on Share > Share
2. Click on "Settings" (cog). Here you can see if it has already been shared with anyone - 2a (if a lock is shown it means no), 2b will show if any sensitivity label is set on the file already
3. Choose one of the following buttons:
 - a) "People in Western Care Association" (this will give anyone with WCA account logged in to 365 access that you set in step 4, by default it is set to "Can view"
 - b) "Only people with existing access" (if the link has been shared with anyone before you will see their profile bubbles here)
 - c) "People you choose" (this option allows you to add people and/or groups that are internal or external)
4. Set the appropriate access here (if it needs to be different than "View only")
 - a) you can also set an expiration date here
5. Click on "Apply" button



6. Click on the back arrow to continue sending a link or email once you finished setting the access

7. Here you can add people individually by their name (if within WCA) or email address (if the intended recipient is external)

8. You can also change the access level here (same as in step 4)

9. You can either click on "Copy link" and paste it into an email or chat or post

a) or write a message in the body and click "Send" button

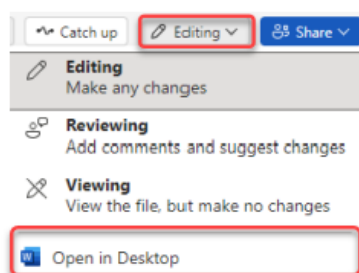
b) or alternatively, click on the 3 dots (...) and select "Send link in Outlook" which will create a new email in Outlook with the link in it

2. How to set a password for a file

Word

Word **Online cannot password encrypt** a document. Also, it cannot **edit** a password-encrypted document. To password protect a Word document, use Open in Word to open it in the desktop version of Word. Thereafter, you must use the Word desktop program to open and edit the document

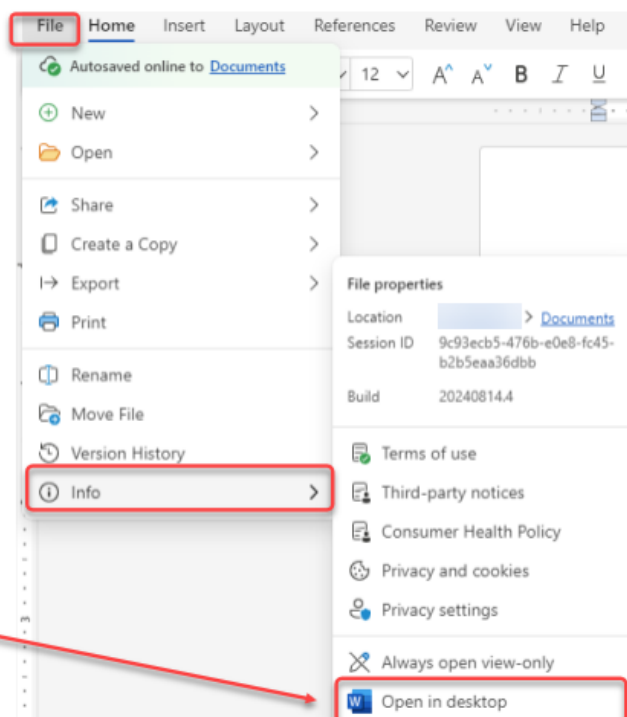
To open the desktop app from the online file, do the following:

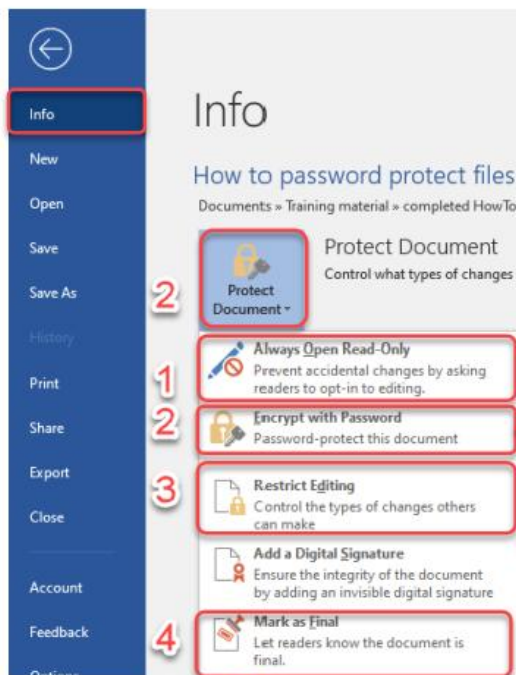


You can open a file in Desktop by either clicking on Mode drop-down and selecting "Open in Desktop"

OR

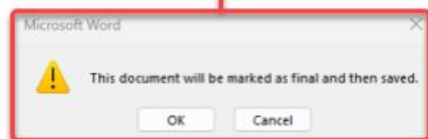
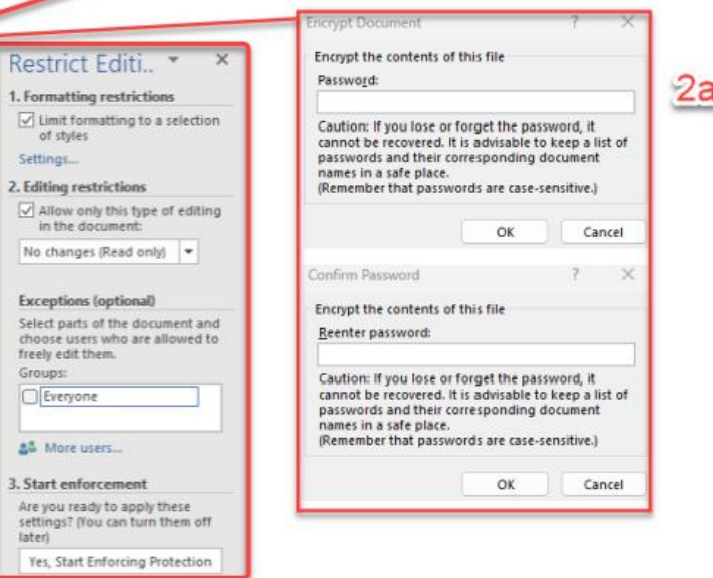
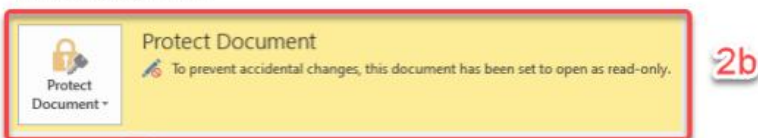
clicking on File > Info and selecting "Open in desktop" in the menu





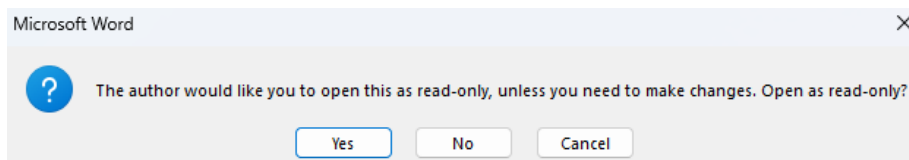
When you open the file you wish to protect click the back error and go to Info. The options under "Protect Document" are:

1. Always Open Read-Only
2. Encrypt with Password
3. Restrict Editing
4. Mark as Final



WARNING: IT department or Microsoft cannot retrieve forgotten passwords, so be sure that your password is especially memorable, and keep it in a safe place.

1. "Always open read-only" will present with a choice dialog if it's been made read-only by file owner



To remove open the document and go to Info and simply click on the option again.

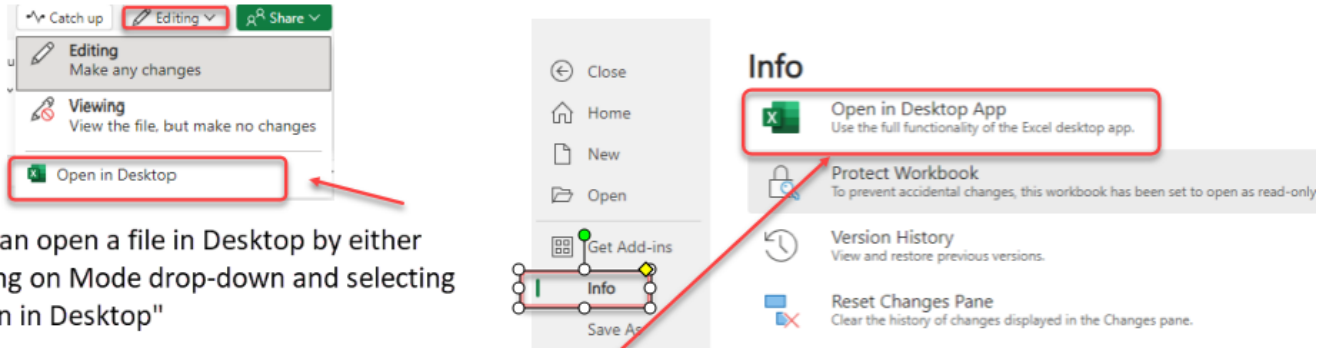
2. "Encrypt with password" lets you set a password (2a – you have to enter the password twice, 2b – the "Protect document" section on top will be highlighted once it's set). To **remove** password, open the file, enter the password, then select this option again and clear/delete the password, and confirm. Save the file after completing these actions.
3. "Restrict editing" there are 2 types of restrictions: **Formatting** and **Editing**; Formatting option allows you to select styles you want to prevent people from modifying, it can be select together with editing option or on its own. The same goes for "Editing restrictions". You can fine more information in the article below:

<https://support.microsoft.com/en-us/office/allow-changes-to-parts-of-a-protected-document-187ed01c-8795-43e1-9fd0-c9fca419dadf>

4. "Mark as final" makes a file read-only. When you mark as final, typing, editing commands, proofing marks are disabled or turned off, and the file becomes read-only, and the Status property of the document is set to Final. **NOTE:** the Mark as Final command is not a security feature. Anyone who receives an electronic copy of a file that has been marked as final can edit that file by removing the Mark as Final status from the file.

Excel

In addition to protecting an excel file with a password there are also other forms of protection, that are not security features but can help you protect the content or the structure of the file. To open the desktop app from the online file, do the following:



You can open a file in Desktop by either clicking on Mode drop-down and selecting "Open in Desktop"

OR

clicking on File > Info and selecting "Open in Desktop App" in the menu

When you open the file you wish to protect click the back error and go to Info. The options under "Protect Document" are:

1. Always Open Read-Only
2. Encrypt with Password
3. Protect Current Sheet
4. Protect Workbook Structure
5. Mark as Final

The 'Protect Workbook' dialog box shows the following options:

- ☒ Always Open Read-Only
- ☒ Encrypt with Password
- ☒ Protect Current Sheet
- ☒ Protect Workbook Structure
- ☒ Mark as Final

The 'Protect Sheet' dialog box shows the following options:

- ☒ Password to unprotect sheet:
- ☒ Protect worksheet and contents of locked cells
- ☒ Allow all users of this worksheet to:
- ☒ Select locked cells
- ☒ Select unlocked cells
- ☐ Format cells
- ☐ Format columns
- ☐ Format rows
- ☐ Insert columns
- ☐ Insert rows
- ☐ Insert hyperlinks
- ☐ Delete columns
- ☐ Delete rows

The 'Protect Structure and Windows' dialog box shows the following options:

- ☐ Password (optional):
- ☒ Protect workbook for
- ☒ Structure
- ☐ Windows

The 'Encrypt Document' dialog box shows the following options:

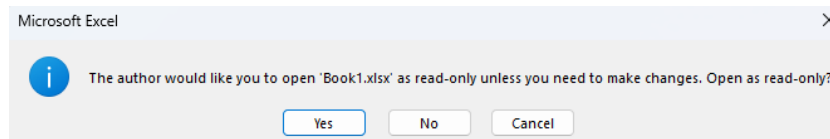
- ☐ Encrypt the contents of this file
- ☐ Password:
- ☐ Confirm Password
- ☐ Reenter password:

The 'Microsoft Word' dialog box shows the following options:

- ☐ This document will be marked as final and then saved.

WARNING: IT department or Microsoft cannot retrieve forgotten passwords, so be sure that your password is especially memorable, and keep it in a safe place.

1. **“Always open read-only”** will present with a choice dialog if it’s been made read-only by file owner

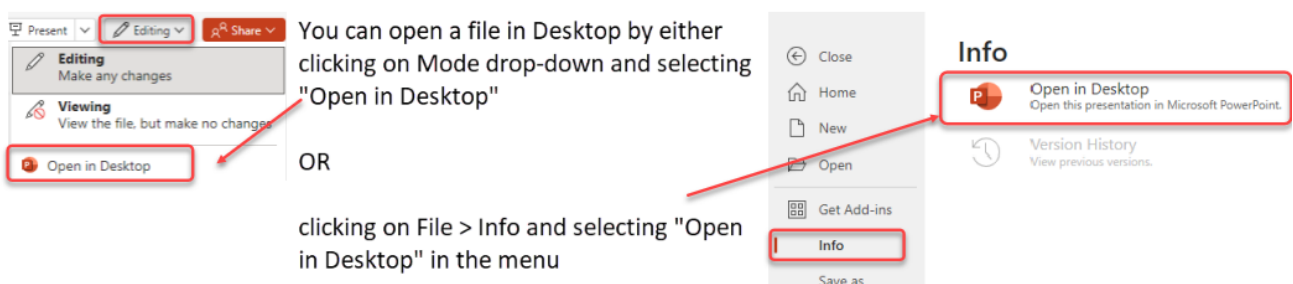


2. **“Encrypt with password”** lets you set a password (2a – you have to enter the password twice, 2b – the “Protect document” section on top will be highlighted once it’s set). To **remove** password, open the file, enter the password, then select this option again and clear/delete the password, and confirm. Save the file after completing these actions.
3. **“Protect Current Sheet”** to prevent other users from accidentally or deliberately changing, moving, or deleting data in a worksheet, you can **lock** the **cells** on your Excel worksheet. With worksheet protection, you can make only certain parts of the sheet editable and users will not be able to modify data in any other region in the sheet. **NOTE:** Worksheet level protection isn't intended as a security feature. It simply prevents users from modifying locked cells within the worksheet. Protecting a worksheet is not the same as protecting an Excel file or a workbook with a password.
4. **“Protect Workbook Structure”** to prevent others from viewing hidden worksheets, adding, moving, deleting, or hiding worksheets, and renaming worksheets, you can protect the structure of the workbook with a password. **NOTE:** Protecting the workbook is not the same as protecting the file or a worksheet with a password. The password is optional. If you do not supply a password, any user can unprotect and change the workbook.
5. **“Mark as final”** makes a file read-only. When you mark as final, typing, editing commands, proofing marks are disabled or turned off, and the file becomes read-only, and the Status property of the document is set to Final. **NOTE:** the Mark as Final command is not a security feature. Anyone who receives an electronic copy of a file that has been marked as final can edit that file by removing the Mark as Final status from the file.

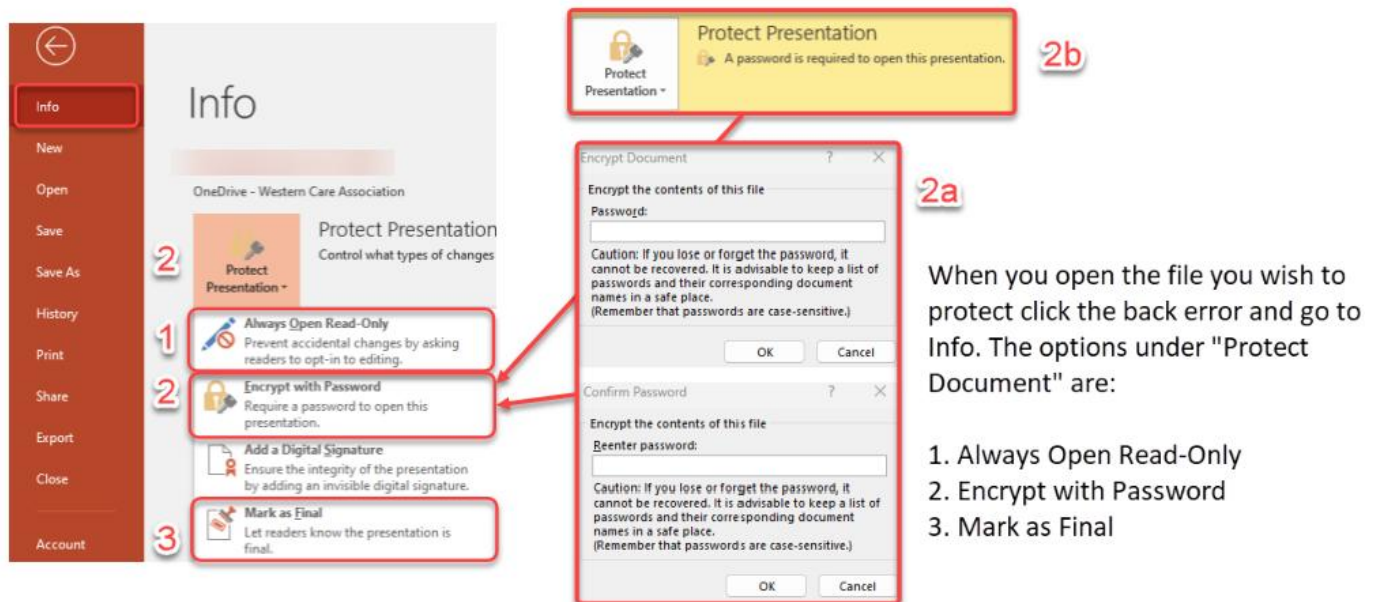
There are no restrictions on the passwords you use with regards to length, characters or numbers, but passwords are case-sensitive. It’s not always secure to distribute password-protected files that contain sensitive GDPR information. <https://support.microsoft.com/en-us/office/protect-a-worksheet-3179efdb-1285-4d49-a9c3-f4ca36276de6>

PowerPoint

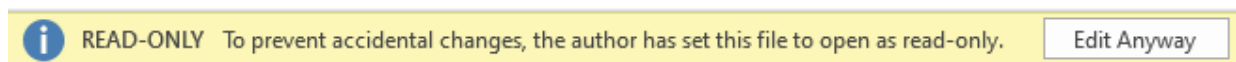
To open the desktop app from the online file, do the following:



There are more limited protection features for a PowerPoint presentation in comparison to Word and Excel. You can protect it with a password, make it read-only and make it final.



1. “Always open read-only” will show the “Edit Anyway” on top of the file



2. “Encrypt with password” lets you set a password (2a – you have to enter the password twice, 2b – the “Protect document” section on top will be highlighted once it’s set). To **remove** password, open the file, enter the password, then select this option again and clear/delete the password, and confirm. Save the file after completing these actions.
3. “Mark as final” makes a file read-only. When you mark as final, typing, editing commands, proofing marks are disabled or turned off, and the file becomes read-only, and the Status property of the document is set to Final. **NOTE:** the Mark as Final command is not a security feature. Anyone who receives an electronic copy of a file that has been marked as final can edit that file by removing the Mark as Final status from the file.

WARNING: IT department or Microsoft cannot retrieve forgotten passwords, so be sure that your password is especially memorable, and keep it in a safe place.

3. Using Sensitivity labels in Outlook or Online 365 apps (Word/Excel/Powerpoint)

For an extra level of protection, you can also use the Sensitivity Labels **instead** of the password option in the apps. The “How to” guide can be accessed on the training website - ["How to apply sensitivity labels"](#)