



# Spreadsheet Methods 5N1977

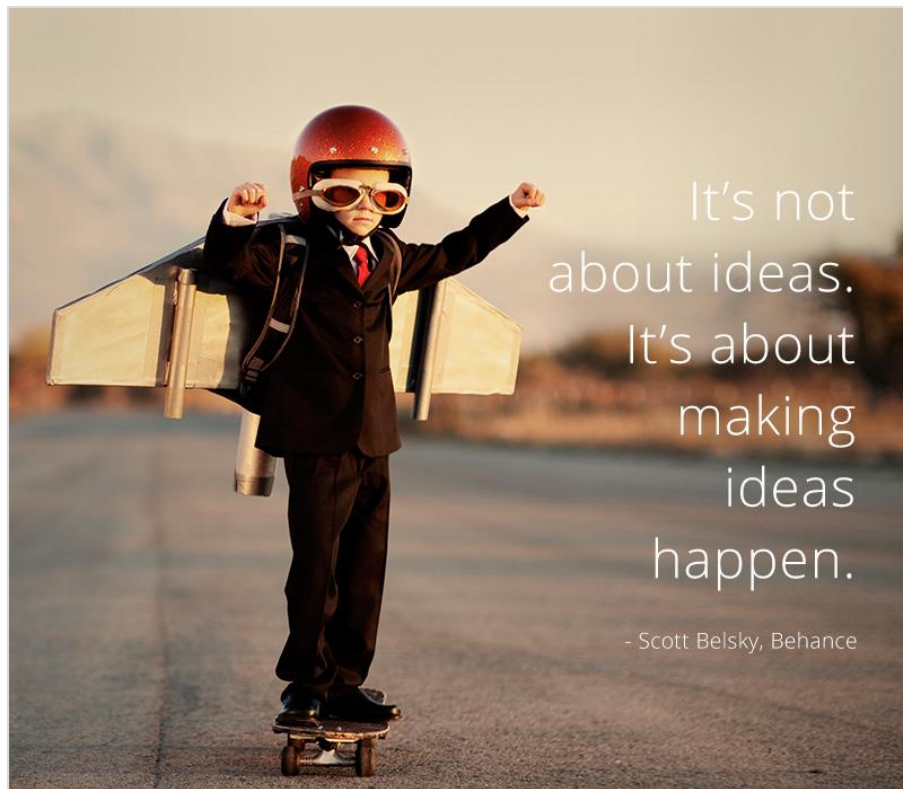
## 10. Editing and Amending for Purpose

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## 1. DEMONSTRATION OF PERSONAL INITIATIVE AND RESOURCEFULNESS IN EDITING AND AMENDING SPREADSHEETS TO ENSURE THEY ARE FIT FOR PURPOSE



**Personal Initiative** is a work behaviour defined as self-starting and proactive that overcomes barriers to achieve a goal. It is argued that future workplaces will require people to show more PI than before (Elsevier Science Ltd., 2001).

Personal initiative is about 'making ideas happen' and self-starting, it is about one's personal energy and responsible decision to act. Nobody can make you act today and you can always say "I'll do it tomorrow" therefore failing to initiate actions that are needed to create the result they want for their circumstances. If you do not enact the causes, the effect will also not occur.

### IN ESSENCE, THERE ARE FOUR LEVELS OF PERSONAL INITIATIVE?

1. The person who will do the right thing before he-she is asked and before it needs to be done.
2. The person who does the right thing, but only if asked.
3. The person who will do the right thing, but only if he-she has been asked several times.
4. The person who refuses to do the right thing, no matter how many times he is asked, nor how bad the situation has become.

*You decide where you sit in these levels by the actions you complete.*

For more information visit [this link](#)

**Resourcefulness** is one's ability to act effectively or imaginatively, especially when faced with difficult situations or decisions. Resourceful people deal with unusual problems, by acting creatively and making things happen. If you don't know the answer to a question or you can remember how to use a formula in Excel how will you figure it out? You can find the answer yourself through RESEARCH, INVESTIGATION or EXPLORATION.



### Amending and Editing Spreadsheets

After a spreadsheet has been created it is very easy to leave it working but still unfinished, there are many ways of using your *personal initiative* and *resourcefulness* to research further uses and applications for spreadsheets, other than the basics covered in this module.

For example you could research the following topics: Data Validation, Pivot Tables, Linking and Importing data, Advanced Filtering, Subtotals, Outlines, Scenarios, Auditing, Dashboards and Templates. In addition only a limited number of functions and formula have been covered in this module, there are hundreds more available and you should research these to become properly proficient with this subject.

The following topics are advanced spreadsheet features that could be used to protect a spreadsheet from its users, to hide important data in a spreadsheet and to recalculate functions and formula after changes have been applied. Using these features are not necessary, however they will make a spreadsheet more secure (showing personal initiative and resourcefulness).

## A. Protect/Unprotect

Protection is primarily added to a worksheet when the creator of the worksheet wants to pass it to other users. The creator of the worksheet can add cell and worksheet protection to prevent the users making mistakes, deleting formula or changing the worksheet. To prevent this from happening it is possible to lock or unlock certain cells and then to protect the worksheet, preventing users from using cells they shouldn't.

### LOCK CELLS

By default the locked setting is turned on for every cell. Locked cells are not actually locked until the worksheet protection is activated.

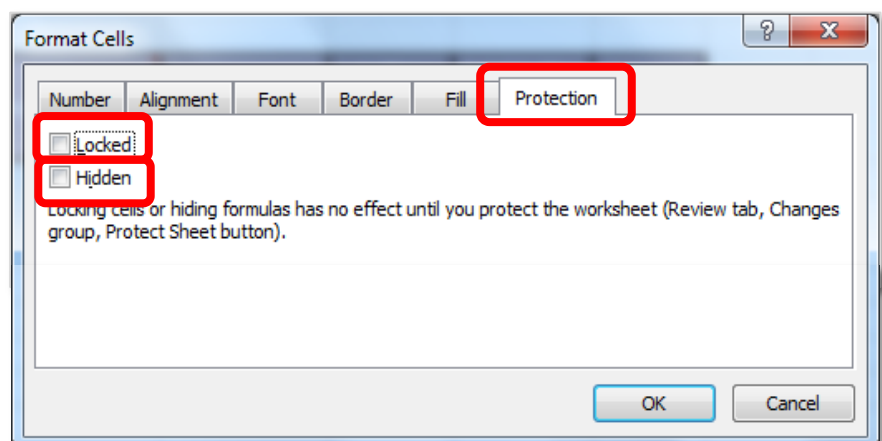
In the following example this worksheet has been setup to calculate the profit on each item of furniture. This spreadsheet will be used by staff who have no knowledge of formula, in order to protect the formula in cells E9:E15 and G9:H15 these cells **will remain locked** and protection will be applied to the worksheet.

	Code	Furniture Item	Quantity Bought	Cost Price per Item	Total Cost Price per Item	Selling Price per Item	Total Selling Price per Item	Profit on Each Item
9	HG7654	Tables	60	€95.00	€5,700.00	€120.00	€7,200.00	€1,500.00
10	KL9876	Chairs	85	€88.00	€7,480.00	€130.00	€11,050.00	€3,570.00
11	LP9876	Cabinets	96	€56.00	€5,376.00	€80.00	€7,680.00	€2,304.00
12	YT9876	Dressers	52	€79.00	€4,108.00	€90.00	€4,680.00	€572.00
13	JT7654	Hall Tables	73	€51.00	€3,723.00	€77.00	€5,621.00	€1,898.00
14	KJ7654	Telephone Tables	55	€63.00	€3,465.00	€80.00	€4,400.00	€935.00
15	LO9808	Mirrors	90	€80.00	€7,200.00	€100.00	€9,000.00	€1,800.00

However, the cells A9:D15 and F9:F15 need to be edited by the staff when prices change or new stock is entered, because changes will need to be made to these cells they will **not be locked**.

**Lock** or **unlock** cells must be done before the worksheet is protected. To do this highlight the cell ranges (use Ctrl to highlight non-adjacent ranges), **right click** on the selected cells and select **Format Cells**. This will open the **Format Cells** dialogue box. Go to the **Protection** tab and deselect the **Locked** tick box. Click **Ok**.

Note that this will turn off the lock for the selected cells only. All the other cells in the worksheet will remain locked.



**Note:** When using cell locking and protection think carefully about which cells should be locked and unlocked - those that need to be changed by the end user should be **unlocked** and those that need to remain locked and safe should be **locked**.

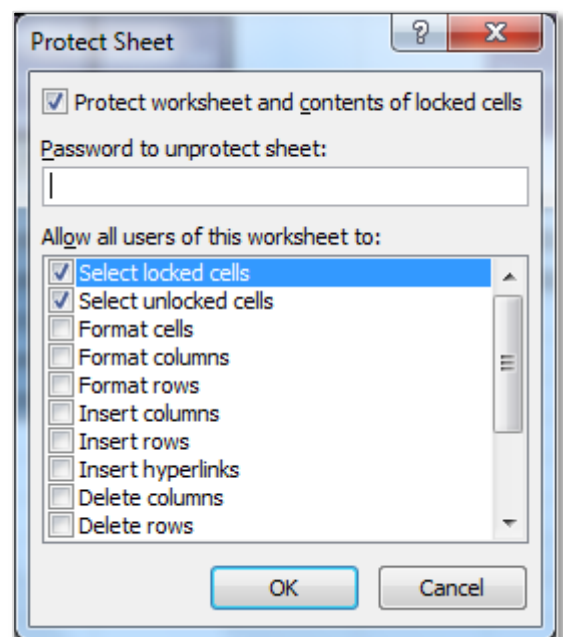
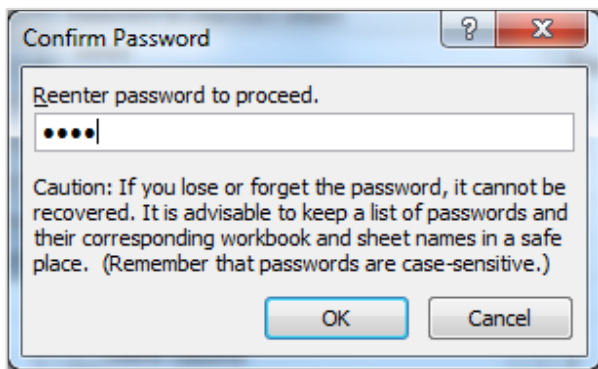
## HIDE CELLS

The formula in cells E9:E15 and cells G9:H15 could also be set to **Hidden** to hide the formula from the formula bar when the cells are selected. To do this highlight the cell ranges and go to the **Format Cells** dialogue box to the **Protection** tab as shown above, select the **Hidden** tick box to apply the setting. When protection is applied to the worksheet the formula in these cells will not be visible in the formula bar.

## PROTECT THE WORKSHEET

To protect the worksheet after the cells have been unlocked or locked go to the **Review** tab to the **Changes** group and select the **Protect Sheet** command button, this will open the **Protect Sheet** dialogue box.

In the **Password to unprotect sheet:** text box enter the password and click **Ok**. This will open the **Confirm Password** dialogue box re-enter the password and click **Ok**.



The worksheet is now password protected and only the **unlocked** cells can be edited.

**REMEMBER: LOST PASSWORDS CANNOT BE RETRIEVED!!!**

## USE OF PASSWORD PROTECTION

When protecting a worksheet or workbook by locking its elements, adding a password to edit the unlocked elements is optional. In this context, the password is only intended to allow access to certain users while helping to prevent changes by other users. This level of password protection does not

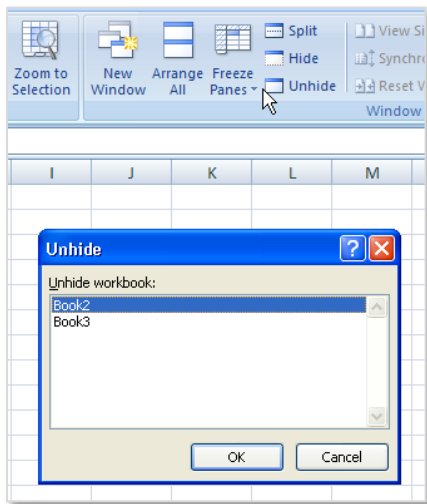
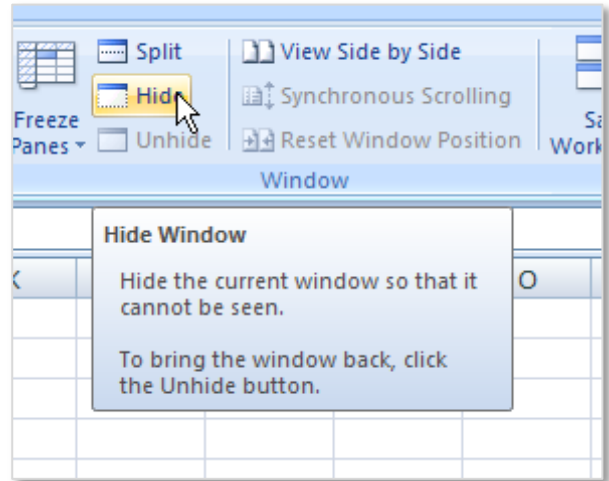
guarantee that all sensitive data in the workbook is secure. For an additional layer of security, secure the workbook itself with a password to help safeguard it from unauthorized access.

When protecting worksheet or workbook elements by using a password, it is very important that the password is remembered. Without it, it is not possible to unprotect the workbook or worksheet.

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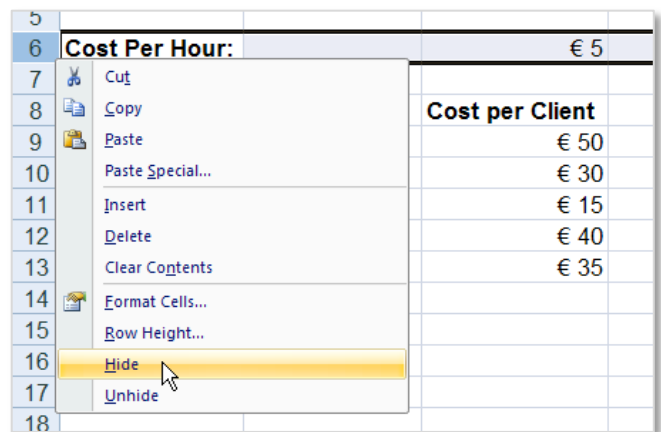
## B. Hide/Display

The **Hide Window** button on the view toolbar allows you to hide a spreadsheet that is currently being worked on so it cannot be seen. This also hides the window so that it is not showing on the **Taskbar** at the bottom of your screen.



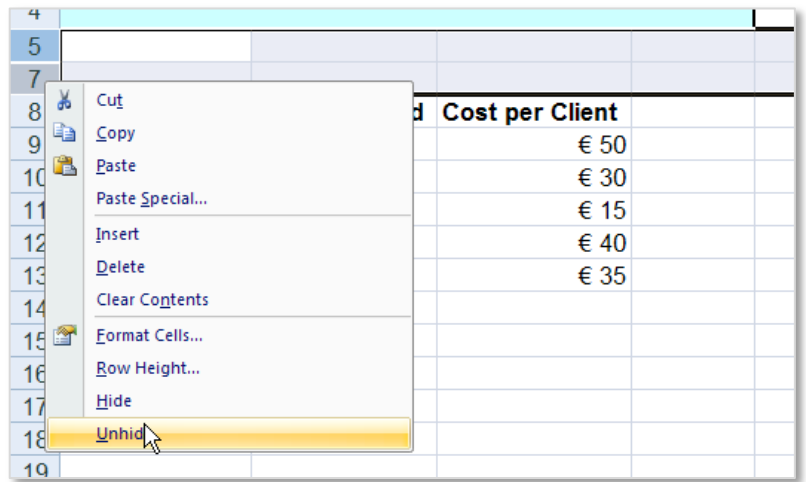
To show a window again click on the **Unhide** window button. If there is more than one window hidden a dialogue box will display asking which window should be unhidden.

On occasion it may be necessary to hide information in a row or column to prevent an end user seeing cost, formula or rates. In this example the row 6 is being hidden to prevent the staff seeing the 'Cost Per Hour'. To hide a row or column highlight the row or column, right click and select **Hide** from the short cut menu.



To unhide the information highlight both the row above and below the hidden row, right click and select **Unhide**.

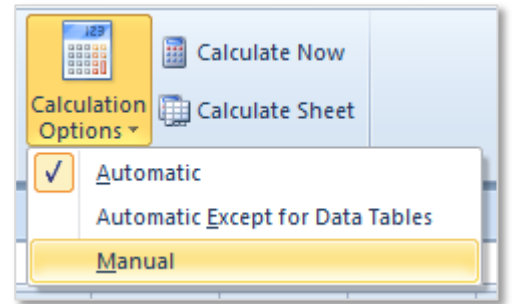
The same principles apply for hiding and showing hidden columns.



### C. Recalculate a Spreadsheet

This means changing the recalculation of a spreadsheet from **Automatic** to **Manual**. Go to the **Formulas** tab to the **Calculation** group and select the Calculations Options command button.

To turn off the **Automatic** recalculation choose the **Manual** option. When the recalculation is turned off the numbers will not automatically update when they are changed. To recalculate manually press the F9 key or select the **Calculate Sheet** command button.



NOTES: