

Creating and Sharing Spreadsheets Safely

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Recent high profile and serious data breaches in the UK have shown the impact of when personal information is erroneously disclosed from within spreadsheets. This can be within pivot tables and additional or hidden tabs. The purpose of this guidance is to inform you of steps you can take to safeguard information being shared through spreadsheets.

Step 1: Do you need to send personal information?

- Assess whether personal information is needed to fulfil the intended purpose.
- Ensure that you are sharing no more information than is necessary for your purpose.

Step 2: Remove personal identifiers where possible

Does the personal information you are sharing need to be identifiable? Consider sending the data without the individuals names. Names can be easily replaced with an identifying number if required. Other checks should include:

- setting up a peer review process - for example, checking it twice, then asking a colleague to check it again
- do a keyword search for common column names such as “address”, “postcode”, “name”, “date of birth”, “email”
- check any columns that contain freeform text such as ‘comments or ‘feedback’
- check all tabs within the spreadsheet for raw identifiable data and remove it

Step 3: Check for hidden personal data

People sometimes hide tabs containing background information for cosmetic or usability reasons. Before publishing or sharing spreadsheets, you must unhide all tabs, columns and rows and delete any personal or sensitive information.

To be certain you are not including hidden data, export the spreadsheet to CSV as this will export all the information from the current tab, including hidden rows or columns. You can then import this data into a new spreadsheet to make sure there is no hidden data in the file.

Spreadsheet tools can also store personal information in the document properties (the metadata), such as the name of the document creator. This is useful for internal documents, but you might want to remove this information for a public facing document. Instructions to do this can be found here:

[View or change the properties for an Office file - Microsoft Support](#)

You can use the Document Inspector to help you find and remove hidden data and personal information in Excel workbooks.

It is recommended that you use the Document Inspector on a copy of your original workbook, because it is not always possible to restore the data that the Document Inspector removes. Additionally, use the Document Inspector with caution as removing information may result in calculations and formulas not functioning.

1. Open the workbook you want to inspect for hidden data and personal information.
2. On the **File** tab, select **Save As**, and type a different name in the **File** name box to save a copy of your original workbook.
3. In the copy of your original workbook, on the **File** tab, select **Info**.
4. Select **Check for Issues**, and then choose **Inspect Document**.
5. In the Document Inspector box, check the boxes of the types of hidden content you want to be inspected.
6. Select **Inspect**.
7. Review the results of the inspection in the Document Inspector box.
8. Select **Remove All** next to the inspection results for the types of hidden content you want to remove from your document.

Step 4: Can you add additional security by changing the format of your spreadsheet?

Consider whether the data needs to be shared or presented in a spreadsheet format.

Converting your spreadsheet into another format can remove any hidden information. You can use the Save As dialogue box to:

- Convert spreadsheets and sensitive metadata into open reusable formats such as Comma-Separated Value (csv) files
- Convert spreadsheets into pdfs

Step 5: Sending the spreadsheet securely.

- Check the address of the individual you are sending to.
- Encryption and Password protection should be followed when sharing. The University offers encryption software: [ZendTo](#) | [University Systems and Software](#) | [Toolkit](#) | [The University of Aberdeen \(abdn.ac.uk\)](#)

Further Information and Help

If you need further advice about Creating and Sharing Spreadsheets, please contact the IT Service Desk: myit.abdn.ac.uk