PASSWORD PROTECTION FOR MICROSOFT OFFICE DOCUMENTS

(protect digital files from prying eyes)

THE PROBLEM

Your law firm emails Microsoft Office files to clients, staff, opposing counsel, and numerous third parties. However, email is notoriously unsafe, you cannot control the actions of the recipients, and emails (and attachments) can be forwarded without your approval or knowledge; therefore, the confidentiality and security of your law firm's documents are at risk. Your law firm needs a way to protect legal documents from prying eyes.

THE SOLUTION

Secure your Microsoft Office documents (Word, Excel, and PowerPoint) with password protection to ensure the confidentiality of your law firm's digital files.

QUICK STEPS

1. Create the file in Microsoft (MS) Office. Note: Word, Excel and PowerPoint files can all be password protected (although Word documents are the most common files in a law firm that typically require password protection).
2. Choose FILE – SAVE AS from the top menu.
3. Choose a File Location as normal, e.g., in the client's electronic folder, and name your file per your law firm's naming conventions for digital files.
4. Click the TOOLS drop down and choose GENERAL OPTIONS.
5. Enter a "Password to open" and click OK. You will then be prompted to "Reenter the password to open."
6. Important: Before you do anything else, ensure you enter that password in the firm's master file password list and record the associated file name.
7. Close the MS Office file and then open that same file as a final check. You will be prompted to "Enter password to open file" … type the password and confirm the file opens correctly.

8. Your MS Office file is now password protected, even if that file is forwarded or shared by the recipient.

9. Email the MS Office file to the intended recipient and ensure you also email or call with the password.

PRO TIPS

✓ Send the password to the recipient in an email separate from the MS Office file (or call the recipient).

✓ Password protection in MS Office is also available when you create a PDF file, e.g., saving a Word document as a PDF.

✓ Maintain an internal database (a list) of all passwords and their associated files. There is no recovery option in MS Office for lost passwords.

✓ Password protection for MS Office files works on both Windows PCs and Macs, and the process is nearly identical.

✓ MS Office allows you to specify passwords for OPENING a file and/or MODIFYING (editing) a file.

✓ Remember to use password protection for all your confidential MS Office files, including Word (word processing), Excel (spreadsheet) and PowerPoint (presentation). And the process is identical across the MS Office suite of applications.

✓ Password protection for MS Office files works on all devices, e.g., computer, laptop, tablet or mobile.

✓ Create a Standard Operating Procedure (SOP) for Password Protection of MS Office files, and add this topic to your onboarding and training materials.

✓ The business productivity suites that compete with MS Office (e.g., OpenOffice, LibreOffice, and WPS Office) also offer password protection for all file types, e.g., word processing, spreadsheets and presentations.

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