

## Hide menu

## Customize the Excel Environment

## Customize formula, proofing, and saving options

## Enhancing workbooks and manage workbook properties

✓ Video: Customize workbooks  
6 min

✓ Reading: Exercise: Customizing workbooks  
10 min

Video: Manage workbook properties  
3 min

Reading: Exercise: Managing workbook properties  
10 min

Practice Assignment: Knowledge check: Enhancing and managing workbooks  
15 min

## Exporting and sourcing data

# Exercise: Managing workbook properties

**Note:** You can pass this course and all graded assessments without access to the downloadable version of Excel.

## How to complete this exercise

To complete this exercise, you will need access to Microsoft 365 Excel.

**Note:** Keep in mind that if you are using free Office for the web or another version of the Microsoft 365 Excel application some features covered in this exercise may not be available.

## Free Office for the web

If you do not have access to Microsoft 365 Excel, you can use Free Office for the web. This version of Office allows you to view and edit files in apps like Word, Excel, and PowerPoint. This free service is available to anyone with a Microsoft account.

## Access Microsoft Account

[Log in to your Microsoft account.](#) Type the email, phone number, or Skype sign-in that you use for other services (Outlook, Office, etc.), then select Next. If you don't have a Microsoft account, you can select No account? Create one!

## Let's get started!

You need to send the commissions report to the accounting department for payment. The department requires that the properties information is completed for their record keeping. You also need to inspect the document to remove any comments that may have been added.

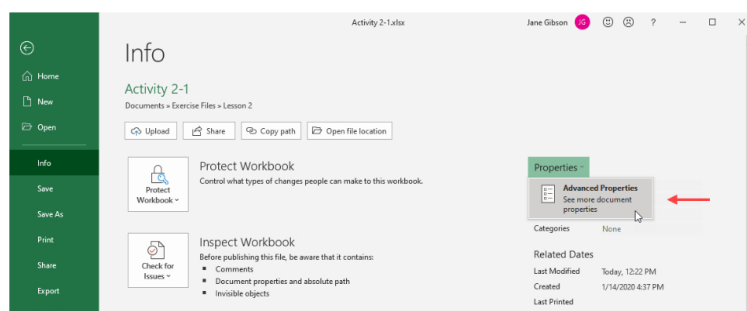
1. Click on the link below to open the Microsoft Excel exercise document you can use to complete this exercise.

[Exercise: Managing Workbook Properties](#)

2. Hover your mouse over cell **I19** and note the comment:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Monthly Sales Commissions and Bonuses													
2														
3	Month:	January												
4														
5	Bonus on Sales over Target:	3.5%												
6	Commission Rate:	2.0%												
7														
8														
9	First Name	Last Name	Employee Number	Sales	Sales Target	Variance to Target	Commission	Bonus	Total					
10	Charlotte	Mackenzie	431	\$ 89,863.20	\$ 100,000.00	\$ (10,136.80)	\$ 1,797.26	\$ -	\$ 1,797.26					
11	Judene	Brenner	271	\$ 186,253.22	\$ 100,000.00	\$ 8,253.22	\$ 2,125.06	\$ 218.86	\$ 2,343.93					
12	Marely	Spencer	243	\$ 88,500.85	\$ 100,000.00	\$ (11,499.15)	\$ 1,770.02	\$ -	\$ 1,770.02					
13	Elisha	Bryant	496	\$ 145,164.96	\$ 100,000.00	\$ 45,164.96	\$ 2,983.30	\$ 1,720.77	\$ 4,704.07					
14	Dixie	Simmmons	445	\$ 149,527.42	\$ 100,000.00	\$ 49,527.42	\$ 2,990.55	\$ 1,733.46	\$ 4,724.01					
15	Deshlah	Avila	298	\$ 40,221.49	\$ 100,000.00	\$ (59,778.51)	\$ 1,604.41	\$ -	\$ 1,604.41					
16	Gabrielle	Norton	277	\$ 99,080.16	\$ 100,000.00	\$ (919.84)	\$ 1,981.60	\$ -	\$ 1,981.60					
17	Marvin	Burton	463	\$ 117,406.50	\$ 100,000.00	\$ 17,406.50	\$ 2,348.13	\$ 609.23	\$ 2,957.36					
18	Saul	Blewins	111	\$ 79,819.36	\$ 100,000.00	\$ (20,180.64)	\$ 1,596.39	\$ -	\$ 1,596.39					
19	Colby	Pham	302	\$ 75,506.90	\$ 100,000.00	\$ (24,493.10)	\$ 1,510.14	\$ -	\$ 1,510.14					
20	Elisha	Mullen	447	\$ 106,883.51	\$ 100,000.00	\$ 6,883.51	\$ 2,117.67	\$ 240.92	\$ 2,378.59					
21	Annabelle	Moon	184	\$ 84,686.89	\$ 100,000.00	\$ (15,313.11)	\$ 1,893.74	\$ -	\$ 1,893.74					
22				\$ 1,226,914.62			\$ 24,518.29	\$ 1,797.26	\$ 29,063.54					
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3. To open the Properties dialog box, click on **File** → **Info** → **Properties** → **Advanced Properties**:



4. The Properties dialog box will be opened. Click to select the **Summary** tab:

Activity 2-1.xlsx Properties

General Summary Statistics Contents Custom

Title:

Subject:

Author:

Manager:

Company:

5. Type **"Sales Commissions and Bonuses - January 2019"** inside the **Title** field:

Activity 2-1.xlsx Properties

General Summary Statistics Contents Custom

Title:

Subject:

Author:

Manager:

Company:

General Summary Statistics Contents Custom

Title: Sales Commissions and Bonuses – January 2019

Subject:

Author:

Manager:

Company:

6. Type **your name** in the **Author** field:

Activity 2-1.xlsx Properties ? X

General Summary Statistics Contents Custom

Title: Sales Commissions and Bonuses – January 2019

Subject:

Author: J Gibson

Manager:

Company:

Category:

Keywords:

Comments:

7. Type **“Acme Widgets”** in the **Company** field:

Activity 2-1.xlsx Properties ? X

General Summary Statistics Contents Custom

Title: Sales Commissions and Bonuses – January 2019

Subject:

Author: J Gibson

Manager:

Company: Acme Widgets

Category:

Keywords:

Comments:

8. Inside the **Category** field, type **“Commissions:”**

Activity 2-1.xlsx Properties ? X

General Summary Statistics Contents Custom

Title: Sales Commissions and Bonuses – January 2019

Subject:

Author: J Gibson

Manager:

Company: Acme Widgets

Category: Commissions

Keywords:

Comments:

9. Click **OK** to update the properties:

Activity 2-1.xlsx Properties ? X

General Summary Statistics Contents Custom

Title: Sales Commissions and Bonuses – January 2019

Subject:

Author: J Gibson

Manager:

Company: Acme Widgets

Category: Commissions

Keywords:

Comments:

Hyperlink base:

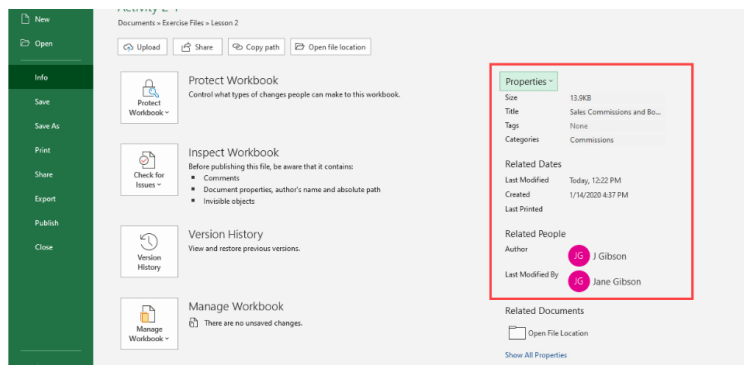
Template:

☐ Save Thumbnails for All Excel Documents

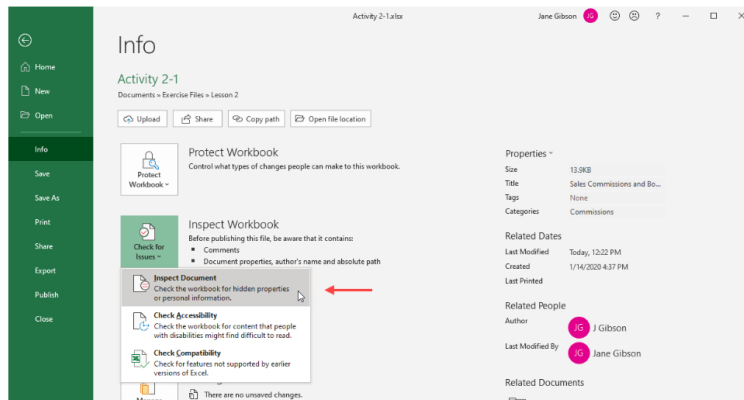
OK Cancel

10. You will now see the updated properties on the right side of the Info category:

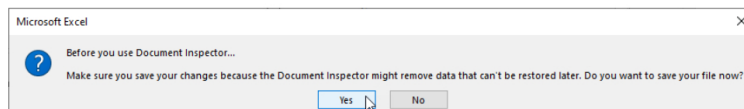




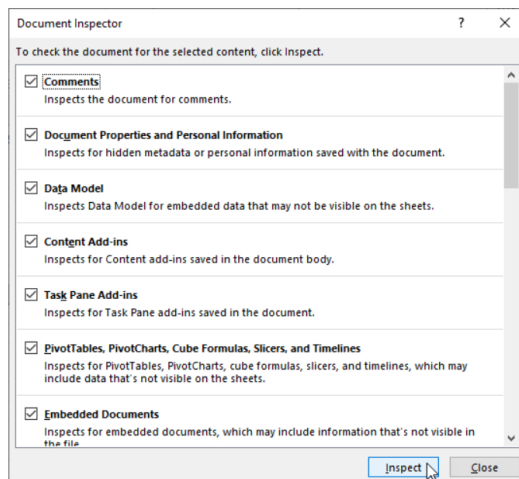
11. Now click on **Check for Issues** → **Inspect Document**:



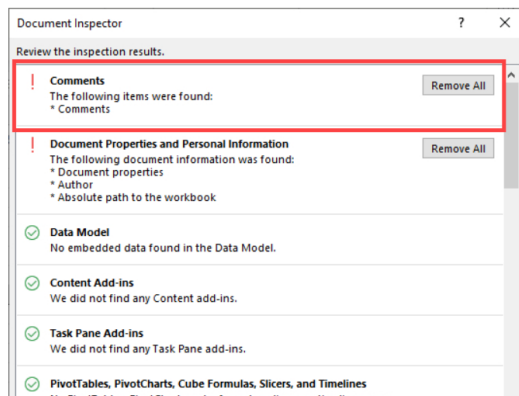
12. Click **Yes** to save the document:

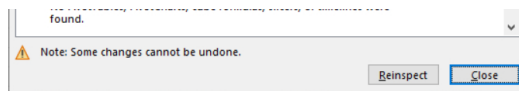


13. Click **Inspect** to start the inspection:

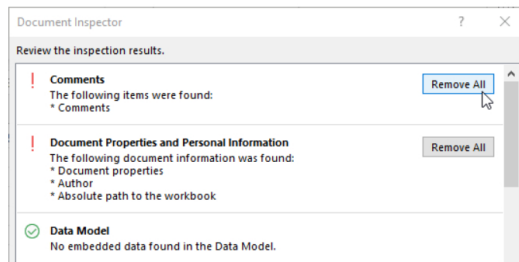


14. Once complete you will note that there were comments found:

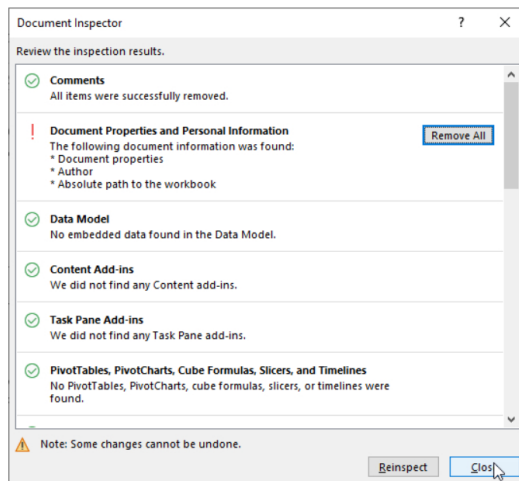




15. There were also document properties found, but you want to keep them. Click the **Remove All** button in the comments field to remove the comments:



16. You can now click **Close** to return to the workbook:



17. Note that the comment in cell I19 has been removed:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Monthly Sales Commissions and Bonuses											
2												
3	Month:	January										
4												
5	Bonus on Sales over Target:		3.5%									
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7												
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9	First Name	Last Name	Employee Number	Sales	Sales Target	Variance to Target	Commission	Bonus	Total			
10	Charlotte	Mackenzie	431	\$ 89,863.20	\$ 100,000.00	\$ (10,136.80)	\$ 1,797.26	\$ -	\$ 1,797.26			
11	Jaslene	Brennan	271	\$ 106,253.22	\$ 100,000.00	\$ 6,253.22	\$ 2,125.06	\$ 218.86	\$ 2,343.93			
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13	Elisha	Bryant	496	\$ 149,184.96	\$ 100,000.00	\$ 49,184.96	\$ 2,961.30	\$ 1,720.77	\$ 4,704.07			
14	Dina	Simmons	445	\$ 140,527.42	\$ 100,000.00	\$ 40,527.42	\$ 2,980.55	\$ 1,733.46	\$ 4,724.01			
15	Delilah	Avila	298	\$ 80,221.65	\$ 100,000.00	\$ (19,778.35)	\$ 1,604.43	\$ -	\$ 1,604.43			
16	Gabrielle	Norton	277	\$ 99,080.16	\$ 100,000.00	\$ (919.84)	\$ 1,981.60	\$ -	\$ 1,981.60			
17	Marvin	Burton	463	\$ 117,406.50	\$ 100,000.00	\$ 17,406.50	\$ 2,348.13	\$ 609.23	\$ 2,957.36			
18	Saul	Blevins	111	\$ 79,833.36	\$ 100,000.00	\$ (20,166.64)	\$ 1,596.39	\$ -	\$ 1,596.39			
19	Coby	Pham	302	\$ 75,506.90	\$ 100,000.00	\$ (24,493.10)	\$ 1,510.14	\$ -	\$ 1,510.14			
20	Elisha	Mullen	447	\$ 106,883.51	\$ 100,000.00	\$ 6,883.51	\$ 2,137.67	\$ 240.92	\$ 2,378.59			
21	Annabelle	Moon	164	\$ 84,686.69	\$ 100,000.00	\$ (15,313.31)	\$ 1,693.74	\$ -	\$ 1,693.74			
22												

18. Save the current workbook as **Activity 2-1 Complete** and then close Microsoft Excel 365 to complete the activity.

19. Now, you can check out an example of a completed document in the link below:

[Completed exercise: Managing Workbook Properties](#)

Mark as completed

Like Dislike Report an issue