

How to Share Excel Spreadsheet: A Practical Workflow



Training goal: choose the right Excel sharing method for the file, people, and task



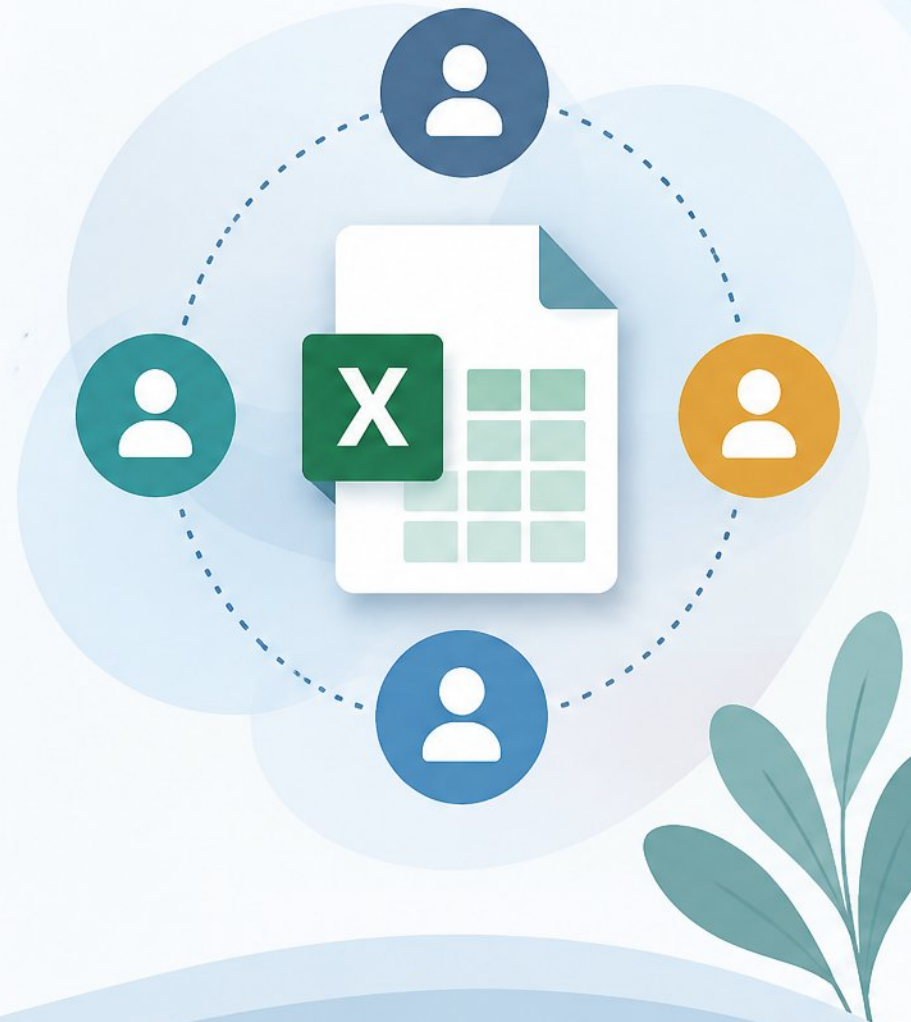
Key factors: co-authoring needs, version-control risk, security, recipient Excel version, mobile access



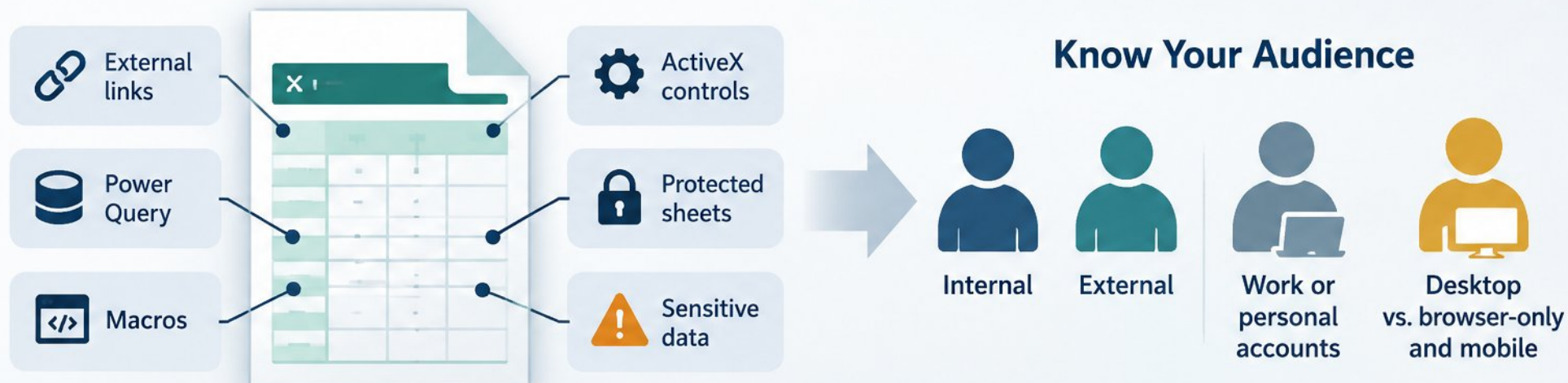
Workflow: prepare workbook, choose method, set permissions, distribute, collaborate, review, lock or archive



Pitfalls covered: broken external links, unsupported browser features, overlapping edits, lost formatting, stale emailed copies



Know Your File and Audience Before You Share



Inventory dependencies: external links, Power Query, macros, ActiveX controls, protected sheets, sensitive data



Identify recipients: internal or external, work or personal accounts, desktop vs. browser-only and mobile



Browser limits: VBA, XML maps, ActiveX, and Form controls block or break Excel for the web



Stale links to dangerous file types now show #BLOCKED errors for recipients



Match method to purpose: quick review, co-authoring, data collection, read-only, or snapshot

Current Sharing Options in Microsoft 365



OneDrive:

private by default,
best for drafts and
a few reviewers



SharePoint library:

team-owned files
with inherited
permissions



Teams:

each channel folder
backed by SharePoint;
chat and file context
together



Email attachment:

one-way snapshot only —
no co-authoring,
no version history



File



Storage



Permissions



Recipients

Setting Permissions and Link Types

Choose the right permission and link type to control access and sharing.

Permission Level	Link Type			
	Anyone	People in your organization	People with existing access	Specific people
 View	 →	 →	 →	 ✕ → 
 Comment or review	 →	 →	 →	 ✕ → 
 Edit	 →	 →	 →	 ✕ → 
 Owner	 →	 →	 →	 ✕ → 

- Permission levels: view, comment or review, edit, owner
- Link types: Anyone, People in your organization, People with existing access, Specific people
- Anyone links need no sign-in and cannot be audited
- Specific people links require authentication and resist forwarding
- Change direct access between view and edit; links cannot switch edit to view
- To change a link, delete it and create a new one

External Sharing and Guest Access



Org-level sharing settings set the ceiling; sites can be stricter, never looser.



Admins can disable Anyone links, restrict by domain, or limit to security groups.



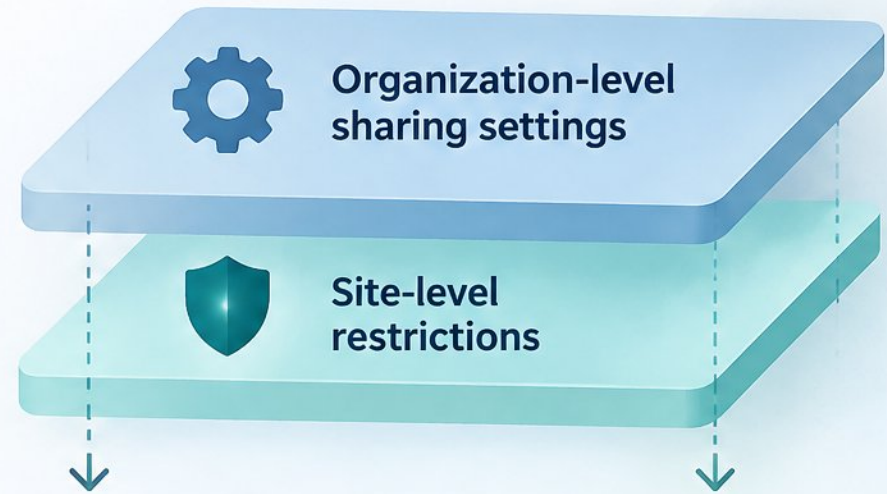
Guests without a Microsoft account verify with a one-time passcode by email.



Specific people links are non-transferable, so forwarded links will not work.



For sensitive files: use Specific people, expire Anyone links, and review access.



Guest



One-time passcode by email



File



Storage



Permissions



Recipients

Preparing a Workbook for Co-Authoring

1



Save to OneDrive, OneDrive for Business, or SharePoint Online; SharePoint On-Premises and other cloud drives won't co-author

2



Use .xlsx, .xlsm, or .xlsb format; Strict Open XML Spreadsheet is not supported

3



Turn on AutoSave — enabled by default for OneDrive and SharePoint files

4

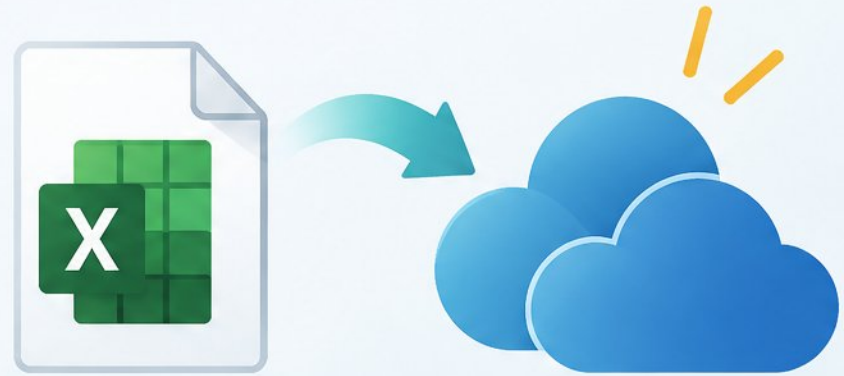


Remove blockers: legacy Share Workbook setting, workbook protection, password encryption

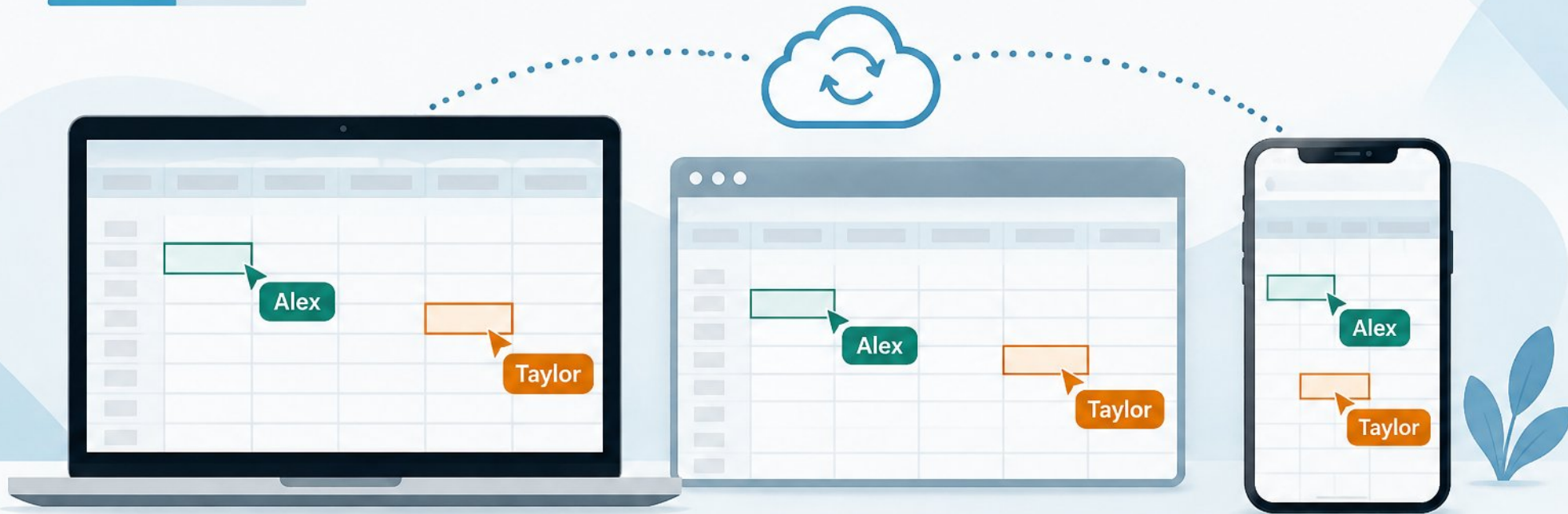
5



Also clear IRM without sensitivity labels and heavy COM add-ins



Co-Authoring in Desktop, Web, and Mobile Excel



Co-authoring works in Excel for Microsoft 365, Excel for the web, Android, iOS, and Excel Mobile



Everyone needs a supported version; one outdated user locks the file for all



Excel 2016, 2019, and 2021 LTSC do not support co-authoring

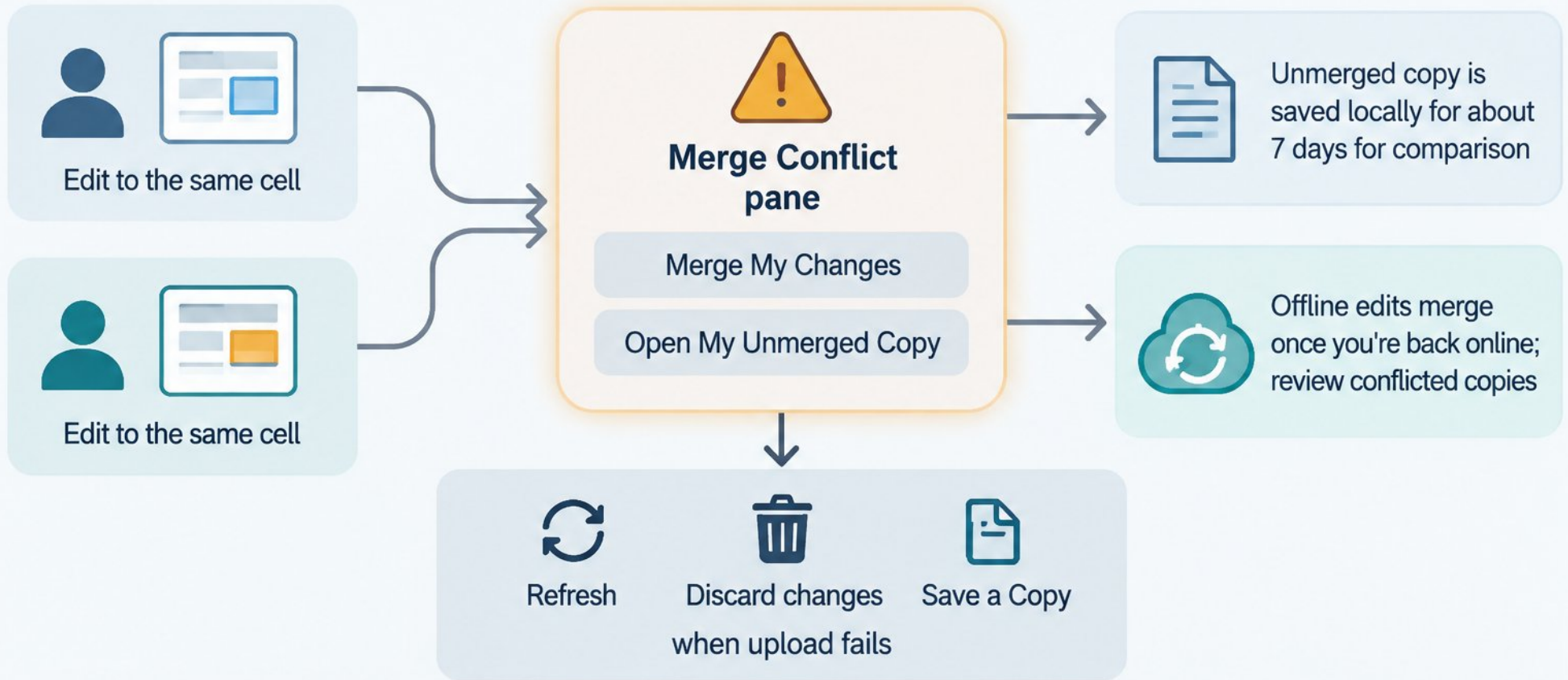


Presence indicators show who is in the file; colored selections need Microsoft 365 plus AutoSave



Standard flow: Share, confirm cloud location, set permissions, add names, send

Handling Merge Conflicts and Sync Issues



- Two edits to the same cell: last saved change wins
- Merge Conflict pane: choose Merge My Changes, or Open My Unmerged Copy
- Unmerged copy is saved locally for about 7 days for comparison
- Refresh, Discard changes, or Save a Copy when upload fails
- Offline edits merge once you're back online; review conflicted copies

Version History and Change Review



Version history works only for OneDrive, SharePoint, and Teams files



Local-only workbooks have no cloud version history; use AutoRecover instead



Open version history via the file title, File > Info, or the three-dot menu



Versions are whole-file snapshots; they do not show cell-level differences



Wait until everyone stops co-authoring before restoring a version

Sharing Securely: Data, Encryption, and Compliance



Run Inspect Document to find comments, hidden rows, hidden sheets, and personal info



Sensitivity labels classify files and can add encryption, headers, footers, or watermarks



Users must sign in with a work or school account to apply sensitivity labels



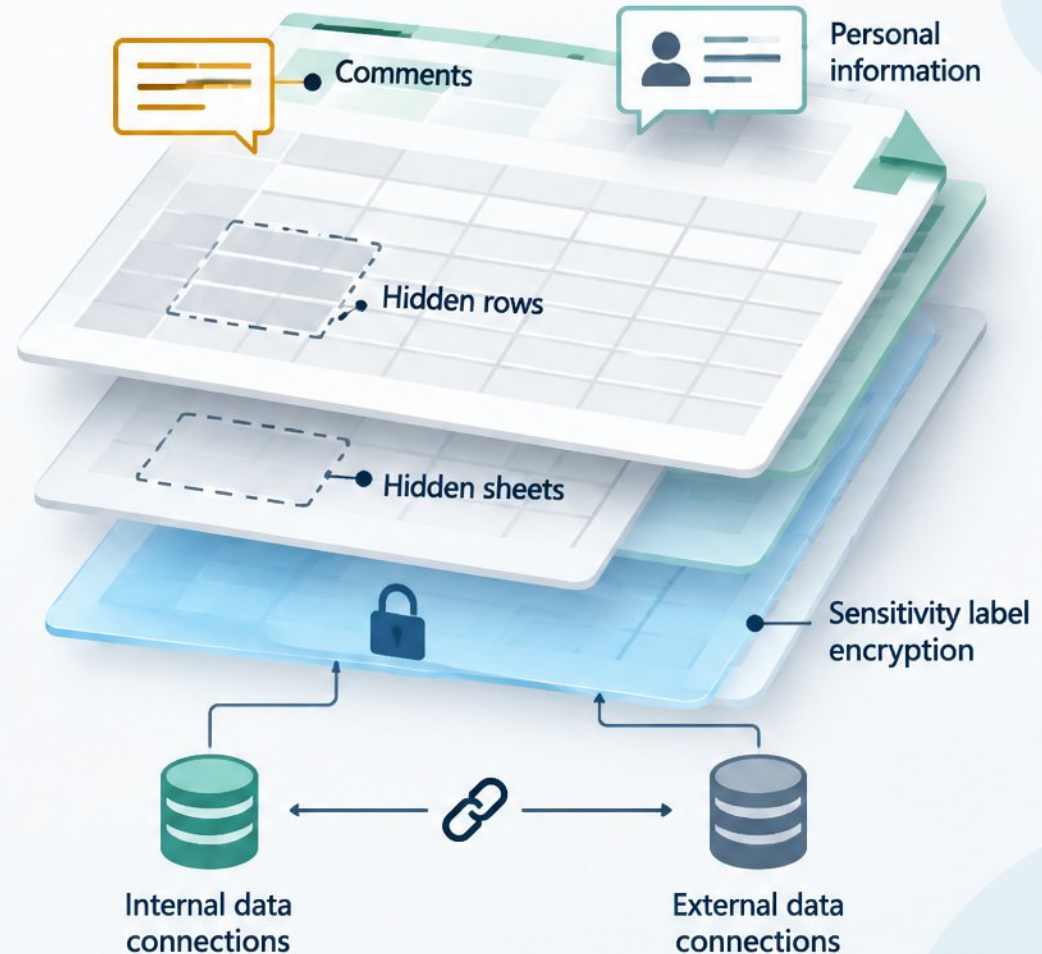
IRM without sensitivity labels blocks co-authoring and AutoSave



Configurations like user access expiration also block co-authoring



Audit external links and data connections; break links only after keeping a backup



View



Comment

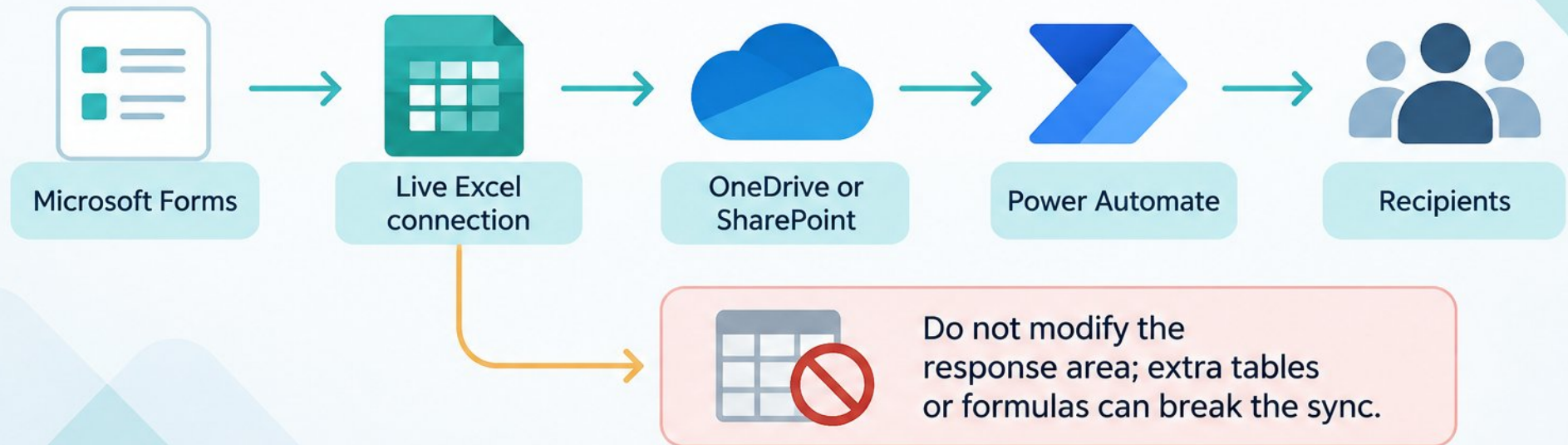


Edit



Owner

Sharing for Data Collection and Forms



-  Microsoft Forms with a live Excel connection is the preferred method for structured input
-  Download a copy is a one-time snapshot that no longer syncs new responses
-  Power Automate writes responses into an Excel table in OneDrive or SharePoint
-  Do not modify the response area; extra tables or formulas can break the sync
-  Use data validation, sheet protection, and a clear destination table for clean responses
-  If sync fails, use Sync all responses to a new workbook

Distributing Read-Only Reports and Dashboards

Share in view-only mode



 View

 Comment

 Edit

 Owner

- Share in view-only mode or enable Always Open Read-Only for consumers.

Publish to the web



- Publish to the web for interactive browser viewing without desktop Excel.

Export to PDF



- Export to PDF for fixed, print-friendly distribution.



Some labeled or encrypted files can't print to PDF in certain tenants.



Keep source data separate; move to Power BI for scale or security.

Using Copilot and Modern Tools to Review Shared Workbooks



Copilot in Excel now includes a change history skill, generally available in 2026



Ask targeted prompts instead of reading the full version stack



Example: summarize important changes from the past week



Copilot can trace a broken formula and help restore it



Use it as a review layer on top of version history



Troubleshooting Common Sharing Problems



File locked: one user's Excel version lacks co-authoring support, or library requires check-out



Can't see others' changes: verify supported Excel version, AutoSave on, file not read-only



Upload Pending or stalled sync: check OneDrive status, clear Office document cache, test safe mode



Avoid volatile functions (NOW, RAND) in shared cells; they trigger endless upload loops



Formula breakage after edits: restore from version history, then refactor to Tables and structured references

Workflow Checklist and Practice Exercise



Team co-authoring and external review

- Team co-authoring: OneDrive or SharePoint with edit links; external review: Specific people links

Data collection and read-only reports

- Data collection: Forms or Power Automate; read-only reports: view-only sharing or PDF export

Pre-share checklist

- Pre-share: run Inspect Document, choose narrowest link type, verify access, set expiration

Practice exercise

- Practice: convert a local workbook, co-author, resolve a conflict, restore a version



- **End-to-end workflow:** assess, prepare, choose location, set permissions, distribute, collaborate, review, lock or archive

PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/45e6907c/public