

XL Guard User Manual – Workgroup Edition

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Introduction

Welcome to XL Guard, by XLforms.

Purpose

XL Guard is the application which allows you to easily ensure the security of your workbooks and spreadsheets in a user-friendly interface. With our proprietary User Access List (UAL) you can set access for up to 20 individual users to a single workbook. This program is intended for personal or professional use.

This manual is intended to provide all the information needed to successfully download and use the XL Guard application.

General Information

All XLforms products require Microsoft Excel desktop edition to function.

You will need a computer running Microsoft Windows 7, 8, or 10 operating system with Microsoft Excel 2007, 2010, 2013, 2016, 2019 or 365 desktop editions installed (please note that Excel Web & Mac editions are not supported).

We strongly recommend that you update Microsoft Windows and Microsoft Office before installing any applications. XLforms applications only support English (United States) at this time.

This application is not compatible with Apple/Mac devices at this time.

Security Information & Requirements

In a world of ever-increasing computer security threats, we at XLforms find ourselves challenged with seamlessly blending our code with Microsoft software requirements, Antivirus software, and other related software demands.

Furthermore, it's our duty to inform our customers of such new requirements, while at the same time making sure that our applications perform as advertised.

In this manual we will address all related security issues that have been reported to us, and we will explain how to install and run our application while complying with the latest industry demands.

Antivirus Security Notes

All XLforms applications include industry standard trusted signed certificates.

Antivirus software may hinder the installation of our product. If you get a false-positive detection from the antivirus and if the application fails to install, you will need to temporarily disable your antivirus software (see instructions below) and then try to install again. Remember to reactivate your antivirus upon successful installation.

To reduce antivirus false-positive detections, you may need to add our application's folder location and the folder path where you want to save your future workbooks to the antivirus software's exception list (see instructions below).

Microsoft Excel Security Notes

XLforms' applications are developed for Microsoft Excel using Microsoft Visual Basic for Applications (VBA) programming language.

As a result, it requires you to enable Excel's macros (see instructions below), and preferably, add the path where you plan to save your macro enabled workbooks to Excel's Trusted Locations list (see instructions below).

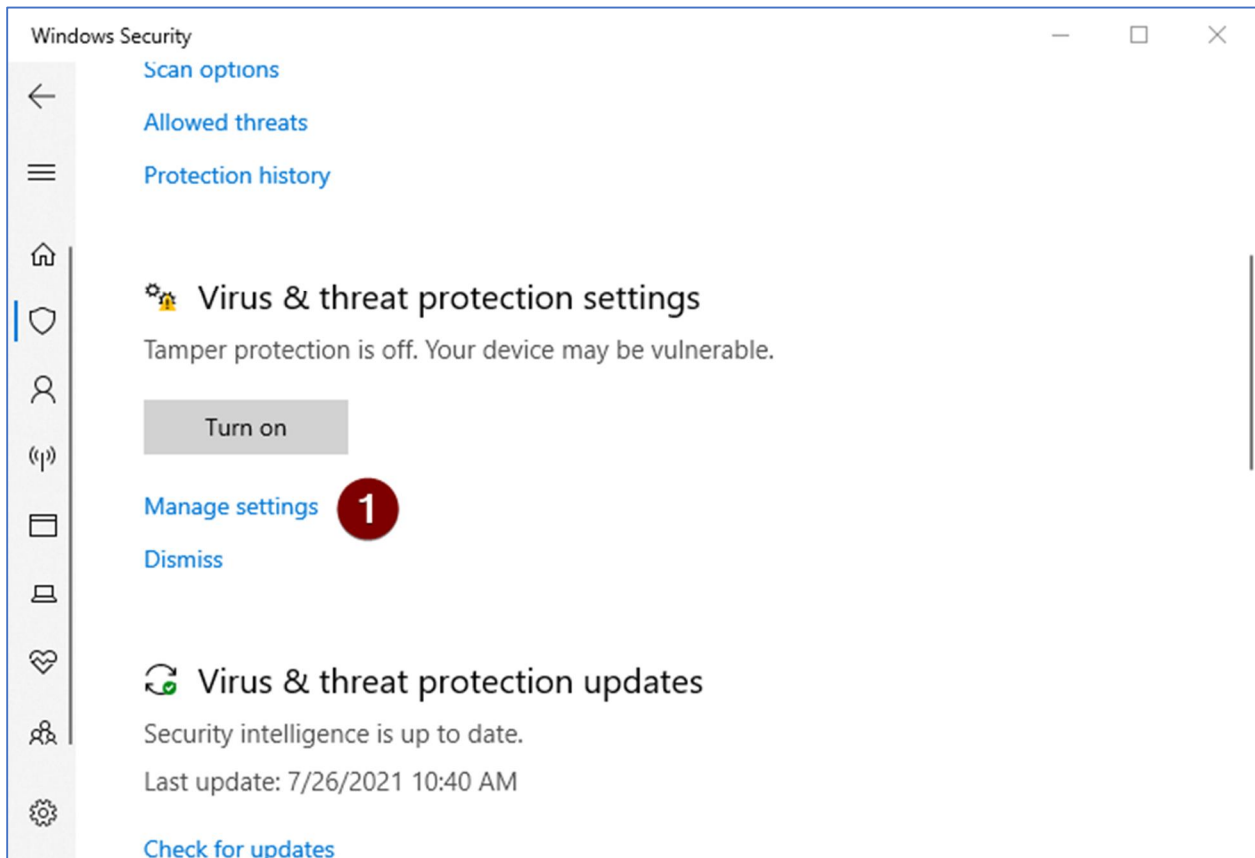
Set your Antivirus to run XLforms applications


In the example below, we are using Windows Security (Windows Defender)

Temporarily disable your Antivirus:

Open Windows Security (with Windows 10, you can type it in to the search bar).
Select Virus & threat protection.

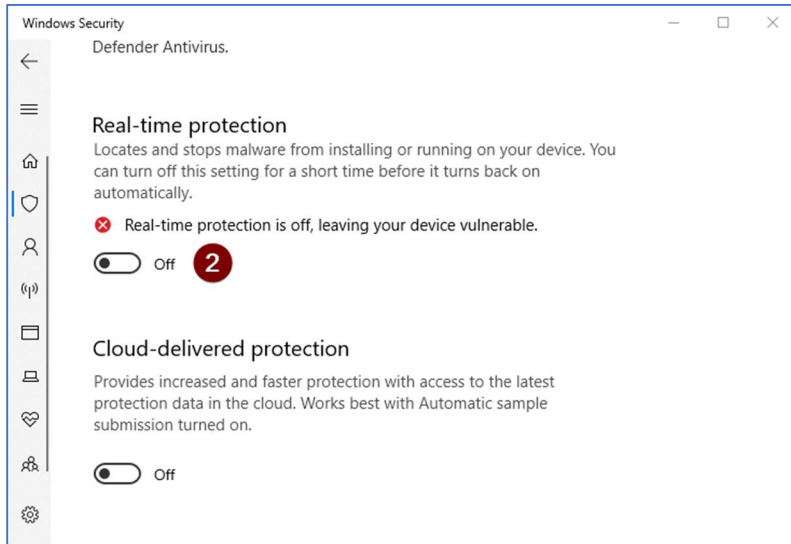
Click Manage Settings (1).



Under the Real-time protection section, click the On (2) switch  On (assuming it's set to on) to pause real-time scanning.

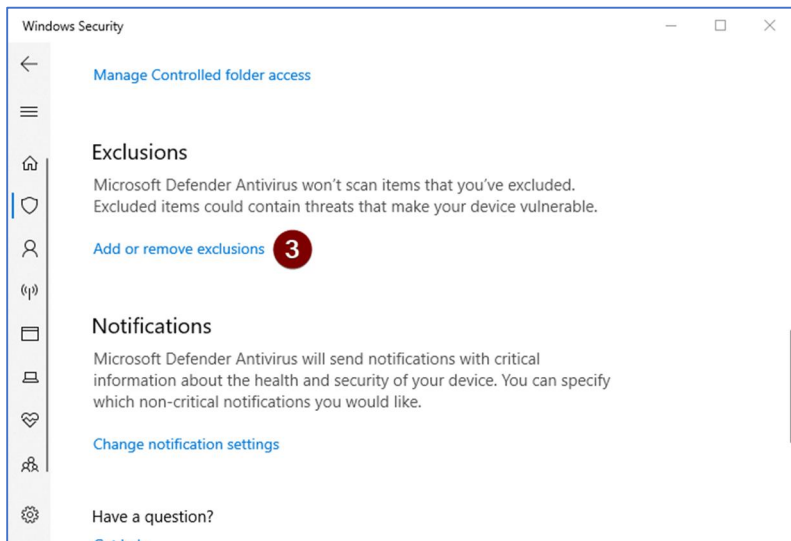
Note: You may get a message "Do you want to allow this app to make changes to your device?" Select yes to continue.

The switch position should show Off (2)

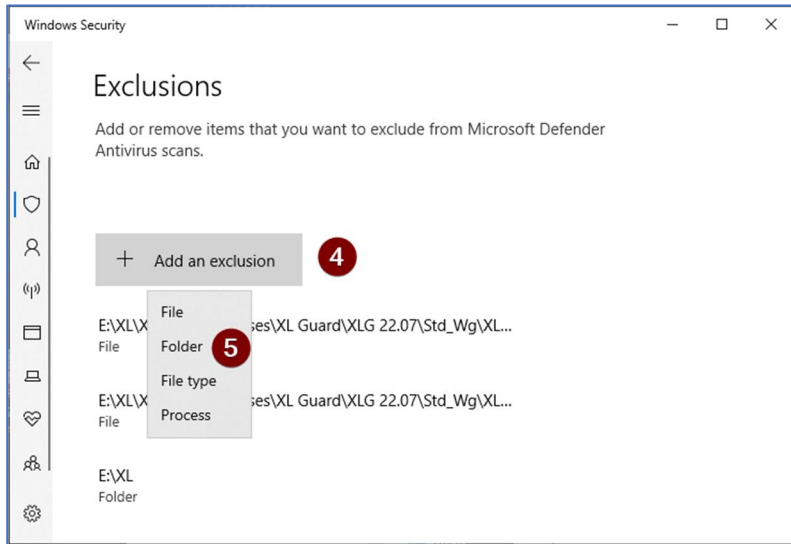


Add XLforms application files to the Antivirus exception list:

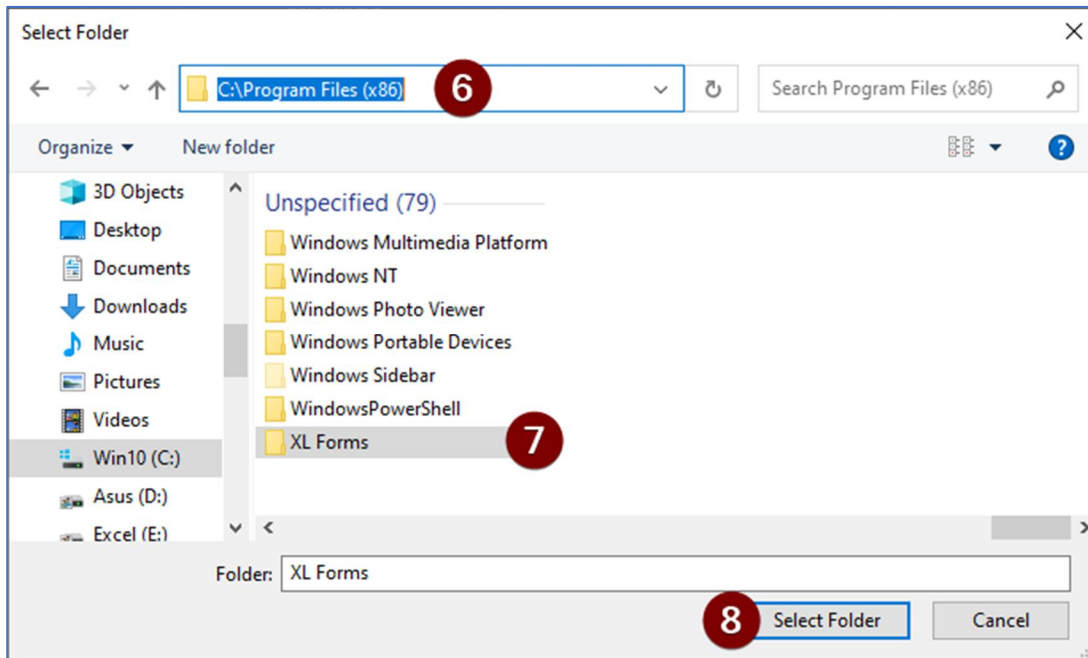
While you are on the Manage settings page, scroll down to the Exclusion section and click on Add or remove exclusions (3)



Click on Add an exclusion (4) and then click on Folder (5).



Next, navigate to XLforms' default applications folder location under "C:\Program Files (x86)" (6), select "XL Forms" (7) and then click on Select Folder (8) button.



We recommend that you create a folder to store your safe Excels' macro enabled files. For example: crate a new folder in c: drive and name it "My Safe Excel Files". Next, repeat the above steps 4-8, and add the new folder path "C:\My Safe Excel Files" to the antivirus folders exclusion list.

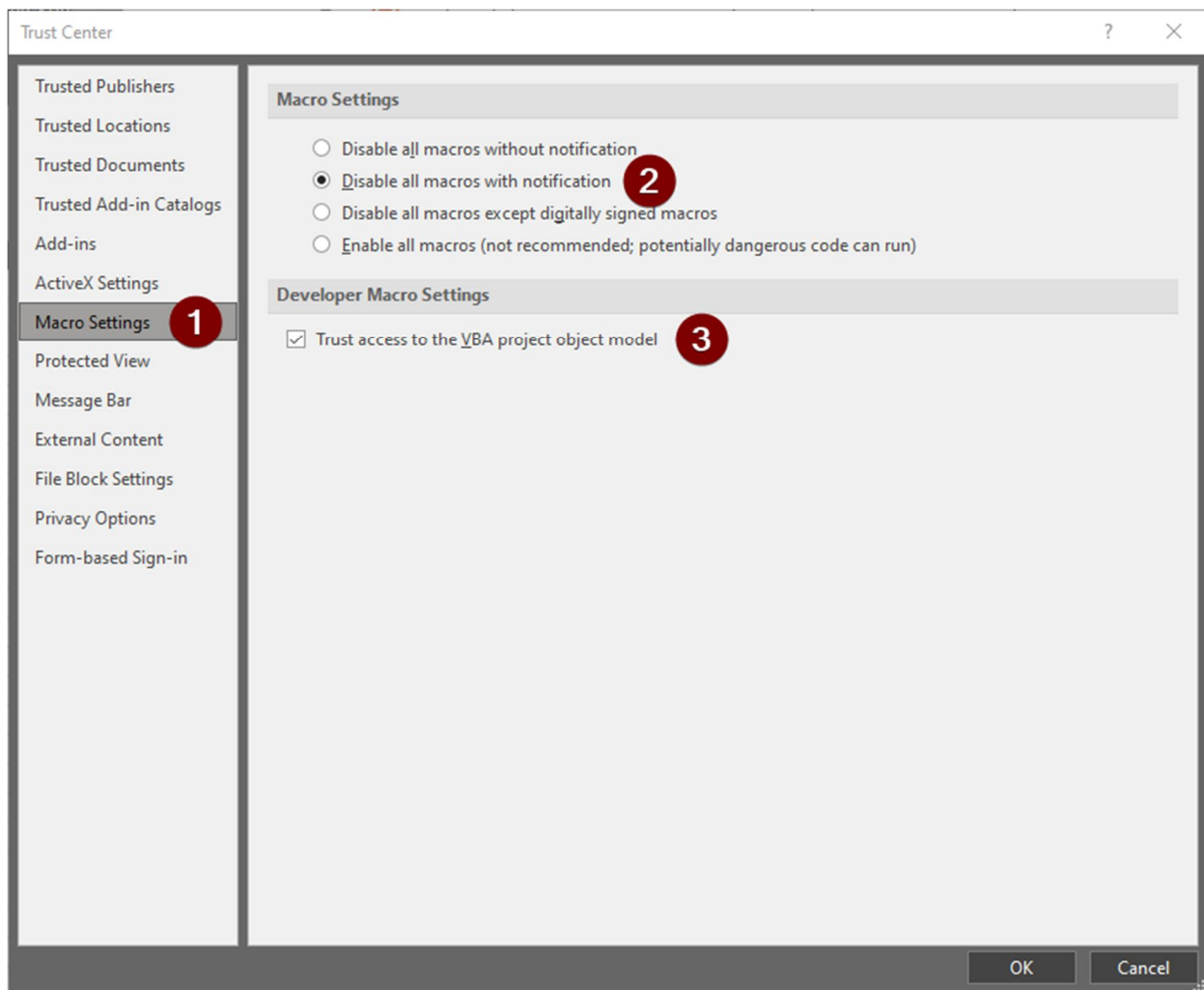
Remember to reactivate your antivirus upon successful installation!

Set Microsoft Excel security

Turn on Excel's macro settings:

Open Excel, Click File > Options.

1. Select Trust Center from the left side options.
2. Click Trust Center Settings on the right side.
3. Select Macro Settings from the left options.
4. Select Disable all macros with notification on the right side.
5. Select Trust access to the VBA project object model on the right side.



Click OK to accept your new settings and continue with setting Trusted Locations.

Set Excel's Trusted Locations:

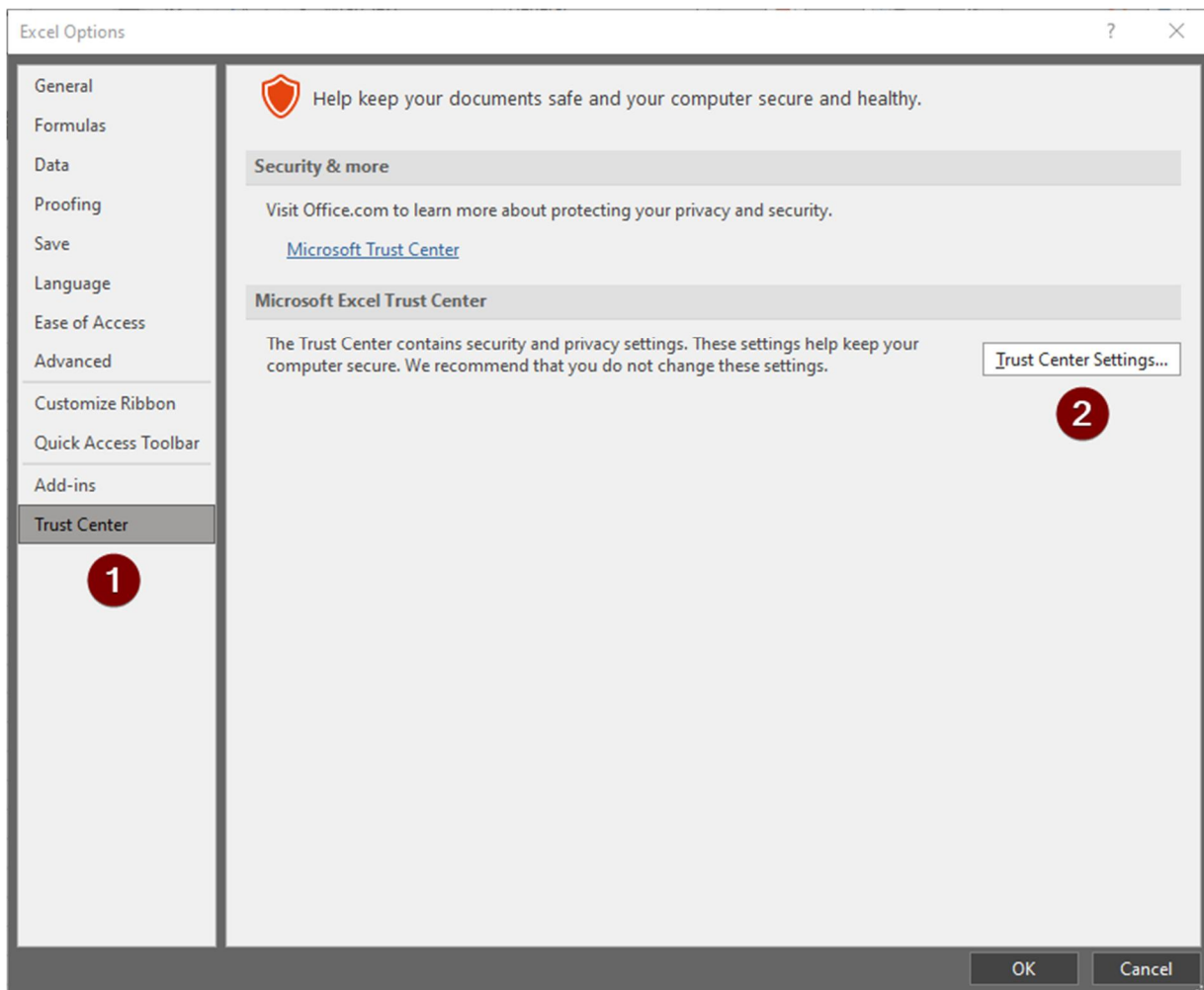
By default, new or unknown files are opened in Protected View by Excel, which prevents our application from functioning properly.

If you know the new macro enabled file is from a reliable source, it's better to move the file to a trusted location, instead of changing the default Trust Center settings to a less safe macro security setting. You should use a trusted location to store your XL Guard workbook files to prevent the Trust Center from hindering the normal behavior of our product or completely blocking it.

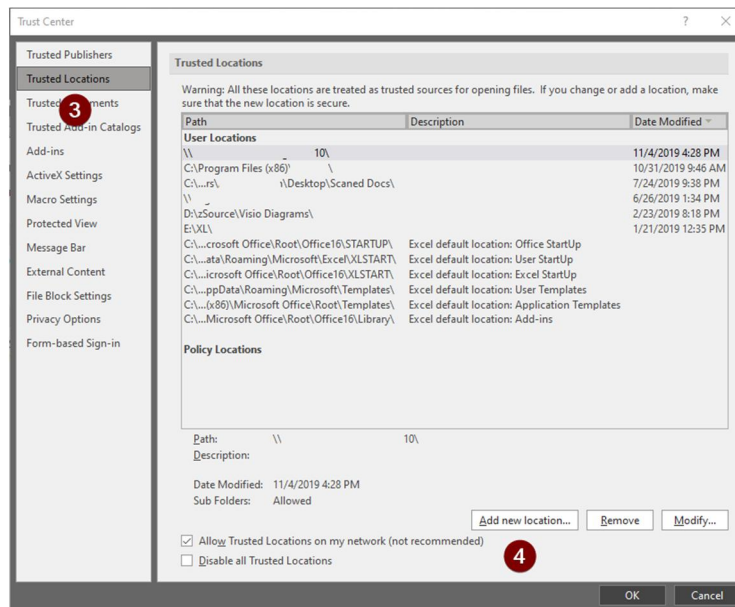
Add a trusted location:

Open Excel, Click File > Options.

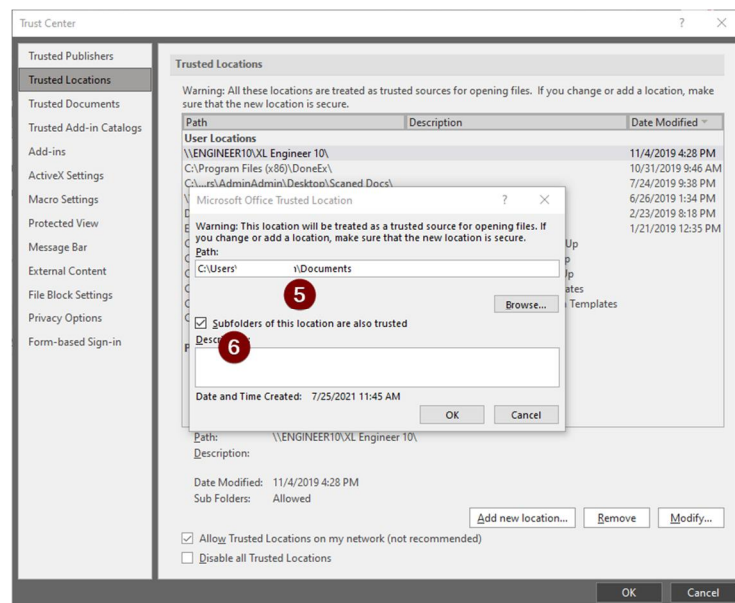
1. Select Trust Center from the left side options.
2. Click Trust Center Settings on the right side.



3. Select Trusted Locations from the left options.
4. Click Add new location on the right side.



5. Click Browse and find the folder you previously created for the Antivirus exclusions list, select the folder and then click Ok.
6. Optionally: Select "subfolders of this location are also trusted".



Click OK again to accept the new settings.

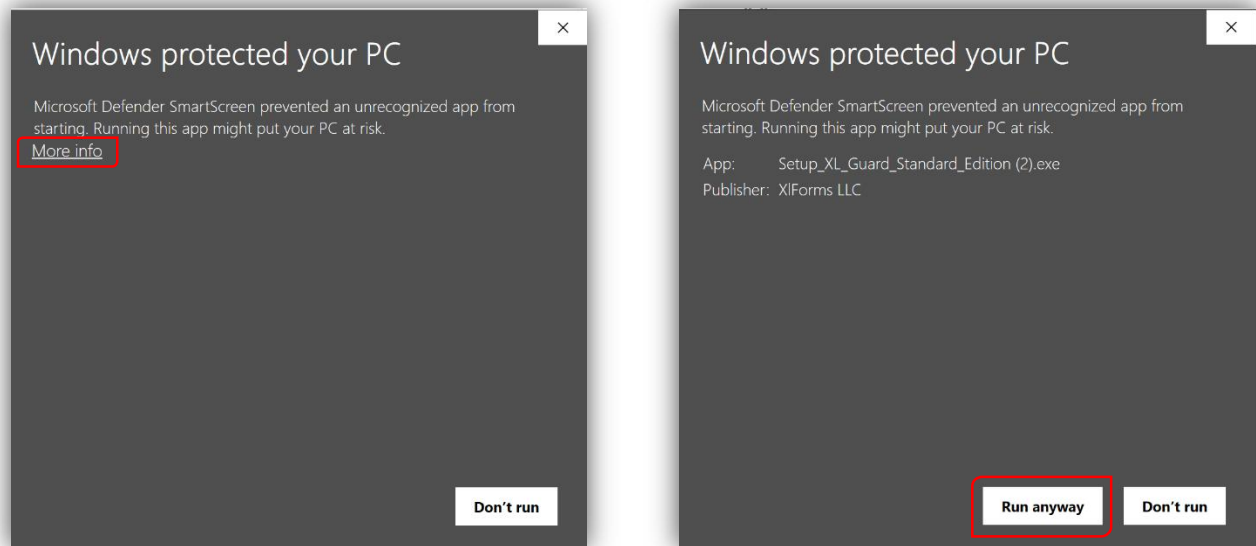
You are now ready to enjoy XLforms applications.

Install XL Guard

After purchasing the XL Guard Workgroup Edition on xlforms.com, you will receive an .exe file to begin the download of your new application.

There is a possibility that when you first try to install the program, you will get a pop-up that reads Windows protected your PC and see a button that says Don't run. This is something precautionary that Microsoft Defender does when it is unfamiliar with a program. Click the "More info" on the pop-up and check if you are familiar with the App name, and that the Publisher name is XLFORMS LLC. If you see our information, continue with the installation as you normally would by clicking on the newly added button that says Run Anyway.

See the below images



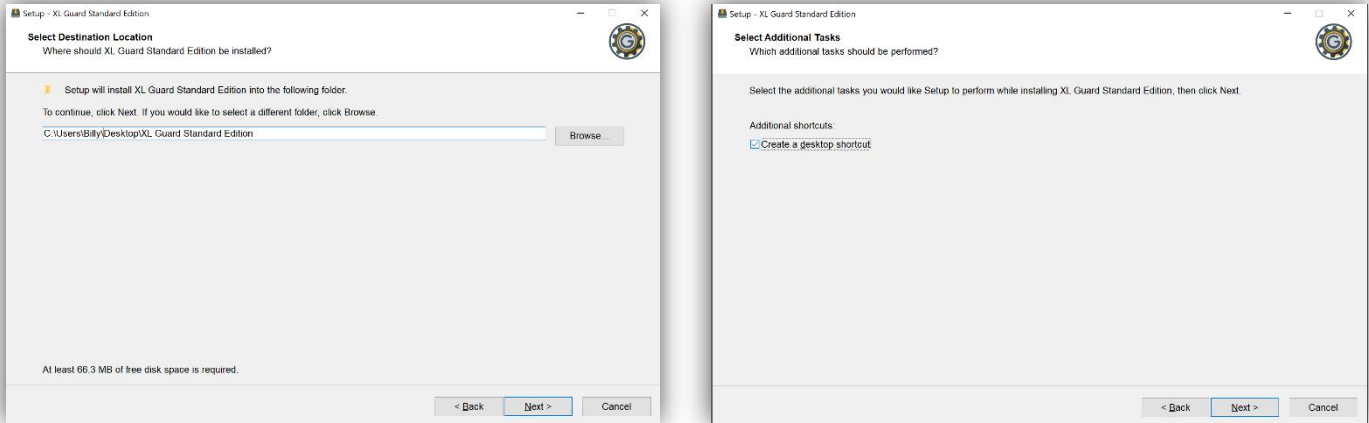
Once you have continued, you will receive a pop-up asking if you will allow the program to make changes to your computer. Press Yes to continue.

If you have previously installed an older version of the XL Guard, you will be asked if you would like to update the app with your current settings. If so, select the Default option and click next. If you wish to change your settings, you may select the Custom option, and you will be able to install the application as if for the first time.

If you are installing the application for the first time, you will be asked to select the location on your computer where you would like to store XL Guard. Select

your preferred file destination and continue, where you can choose to create a desktop shortcut as well. *This is highly recommended.*

See the below images



After making these selections, click the Install button, and once the Setup Wizard has completed the installation, click Finish to exit.

Getting Started

Now that the XL Guard Workgroup Edition has been successfully installed, open the program via your preferred file destination or desktop shortcut if you elected to create one.

This will open the XL Guard File Creator. The first time that you use the file creator, you will be shown the End-User License Agreement. You must select I Agree to be able to use the application.

After this, you will be shown a window with basic operating information about your current version of the application, as well as this user manual. Any time you wish to create a new protected XL Guard file, you will need to go to this window and click Create New XL Guard File. Once you have done so, you will be able to name your new protected workbook and save it in your preferred destination.

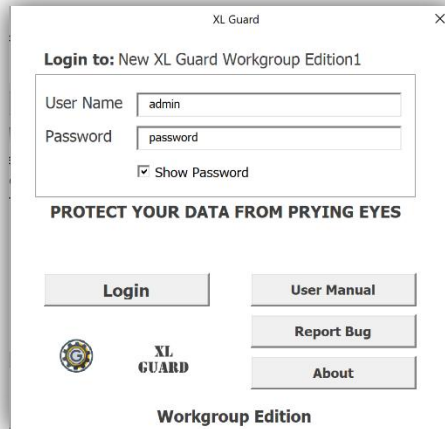
Now that you have created your workbook, open the new file, where you will be prompted to log in.

When you create new XL Guard workbook, the Default username and password is as follows:

Username: admin

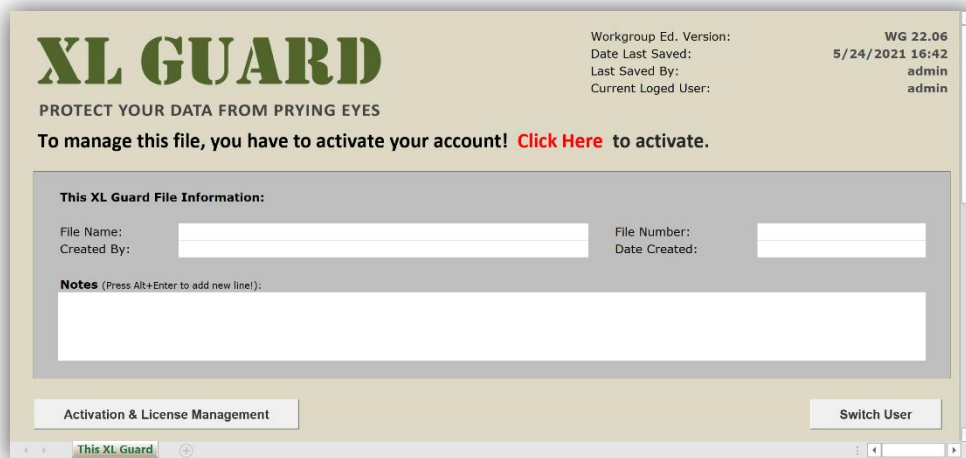
Password: password

THESE ARE CASE SENSITIVE



After logging in, you will be able to update your login information to be unique to you. Bear in mind that once you have updated your login information, you are responsible for keeping it recorded.

If you lose your username and/or password, XLforms will not be able to recover them.

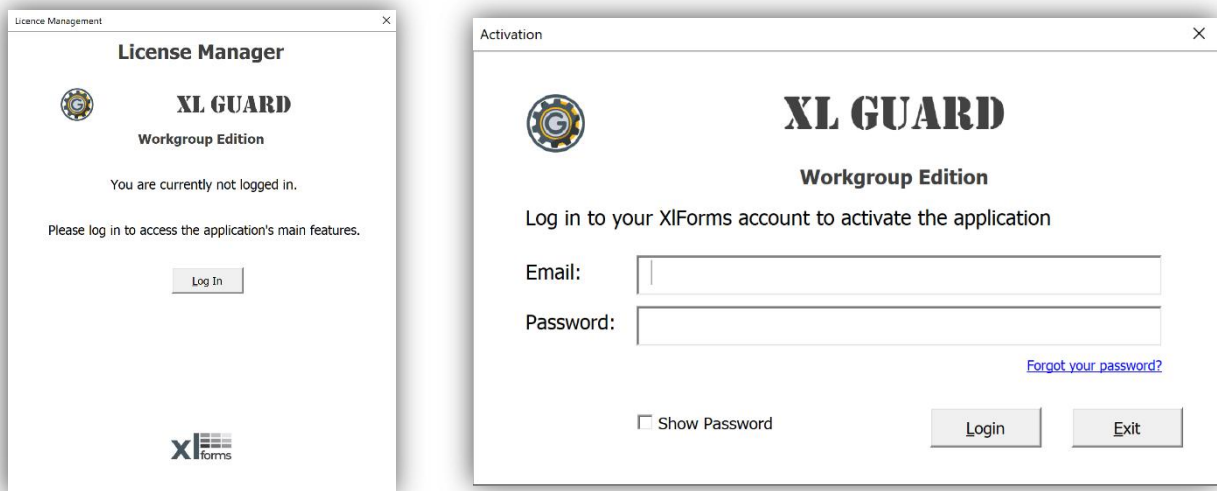


After logging into the application, you will be brought to the This XL Guard tab, but lets start by going through the administrator's responsibilities.

License and Activation

Before using any of the applications features, you must activate your user license for the computer you will be using. You can do so either by clicking the red Click Here on the This XL Guard tab or clicking the Activation & License Management button.

You will be shown the below window, where you must select Log In and enter the email and password that you used when first purchasing the application. After doing so, you will be shown the number of licenses available on your account, and click Activate to start using the application.



Please note that the programs' basic features will function without an active license, but in order to access any administrator rights, the license must be installed on your device. If you get a new device and need to transfer your license, simply click on the Activation & License Management button and log out. The license will then be restored to your account and available for use on another device.

Now that you've logged in with the default username and password, review the Administrator tab and its functions before starting to use the application.

Administrator Tab

Admin Password

XLforms highly suggests to change the default administrator credentials and create a unique username and password by updating the credentials in this tab, especially if this application is to be shared with others users. Once you have entered your preferred login information, make sure to save the application to ensure it is successfully changed.

Activity Log

The other main feature of the Administrator tab is the ability to review all user activity. Any logins, user changes, saves, and other updates to files within the workbook are recorded for the administrator's records.

Click Show Activity Log and you will be shown a screen that looks like such:

ADMINISTRATOR SETTINGS PAGE:

Assign Special User Access Rights:
To assign special access to User Accounts and User Privileges settings, mark the appropriate cell with an X by Double Clicking it.

User Accounts:
Allow add/remove or reset password for all other user except the administrator.

User Privileges:
Allow add/remove sheets and setting other users access control for viewable worksheets.

[Show Activity Log](#)

Administrator Name:

Administrator Password:

LOG ACTIVITIES RECORDS:

Note: Log activities are printable.

[Go Back](#)
[Delete All Records](#)

User Name	Information	Timestamp
admin	Saved Workbook	5/13/2021 14:30
admin	Changed the password for account: Billy Bob	5/13/2021 14:18
admin	Changed the password for account: James Macavoy	5/13/2021 14:18
admin	Created a new user account: James Macavoy	5/13/2021 14:18
admin	Created a new user account: Billy Bob	5/13/2021 14:18
admin	Changed the password for account: Jason Segel	5/13/2021 14:18
admin	Created a new user account: Jason Segel	5/13/2021 14:18
admin	Changed the username for account: "Boop" to "Jennifer Anniston"	5/13/2021 14:17
admin	Changed the username for account: "Beep" to "Will Smith"	5/13/2021 14:17
admin	Changed the password for account: Boop	5/13/2021 14:17
admin	Created a new user account: Boop	5/13/2021 14:17
admin	Changed the password for account: Beep	5/13/2021 14:17
admin	Created a new user account: Beep	5/13/2021 14:17
admin	Logged In	5/13/2021 14:16

Special User Access

Note: To use the special user access feature, you must add users to the User Access List (UAL), via the Manage User Accounts tab.

The administrator tab is also where the owner of the workbook can go to assign

Re-Sort Names		Select users with special * management rights	
	User Name	Allow to manage user accounts (UMG)	Allow to manage worksheets (WMG)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

* Users with special management rights, will require a separate license, if they run this app on another computer than the registered one.

special access rights to trusted users or managers. By double clicking on the corresponding box, the administrator can add users to the Worksheet Management Group (WMG) and/or the User Management Group (UMG).

Please note that while the XL Guard can be used on devices without an active license, administrator access and special user access rights are not available.

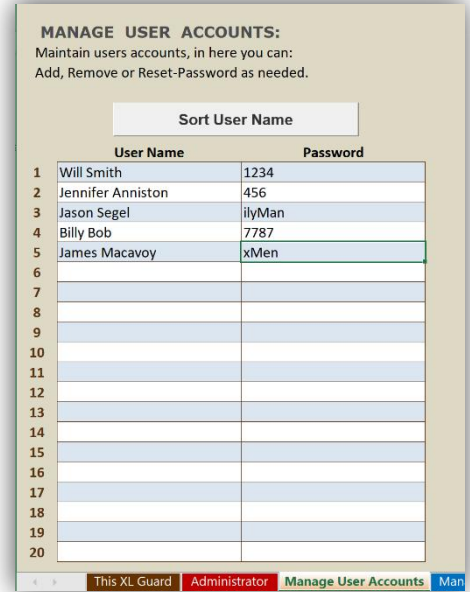
The administrator & users with special management rights (UMG & WMG) will require a separate license for any device other than the one that the application was originally registered with.

Manage User Accounts Tab

User Access List (UAL)

The Manage User Accounts tab is accessible only to the administrator and users who have been added to the UMG.

This is where the usernames and passwords for all users apart from the administrator are stored. Here those in the UMG can create new logins for employees, who later can choose to update their password. In addition, if a user is unable to keep track of their login information, the administrator or managers can come to this tab to reset the user's account.

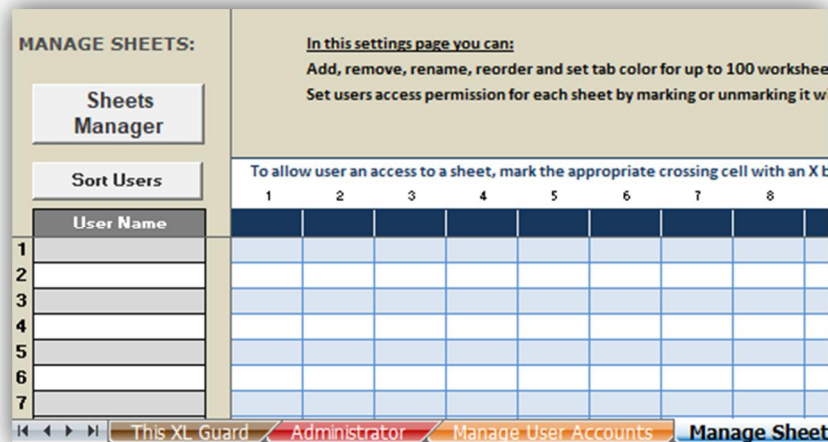


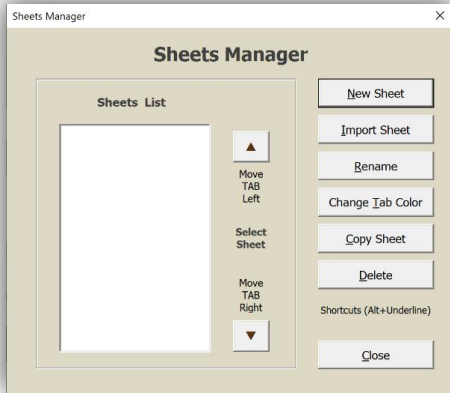
Note: Users are strongly advised not to use passwords which they use on other devices and applications, as these passwords are all visible to the administrator at all times.

Manage Sheets Tab

The administrator and users in the WMG also have access to the Manage Sheets tab. This is where the WMG can use XLforms proprietary Sheet Level Access Control (SLAC) to add and remove standard users' access to individual worksheets.

Double-click on the box which corresponds to the sheet you want to give/remove access to, and that user's privileges will be updated.



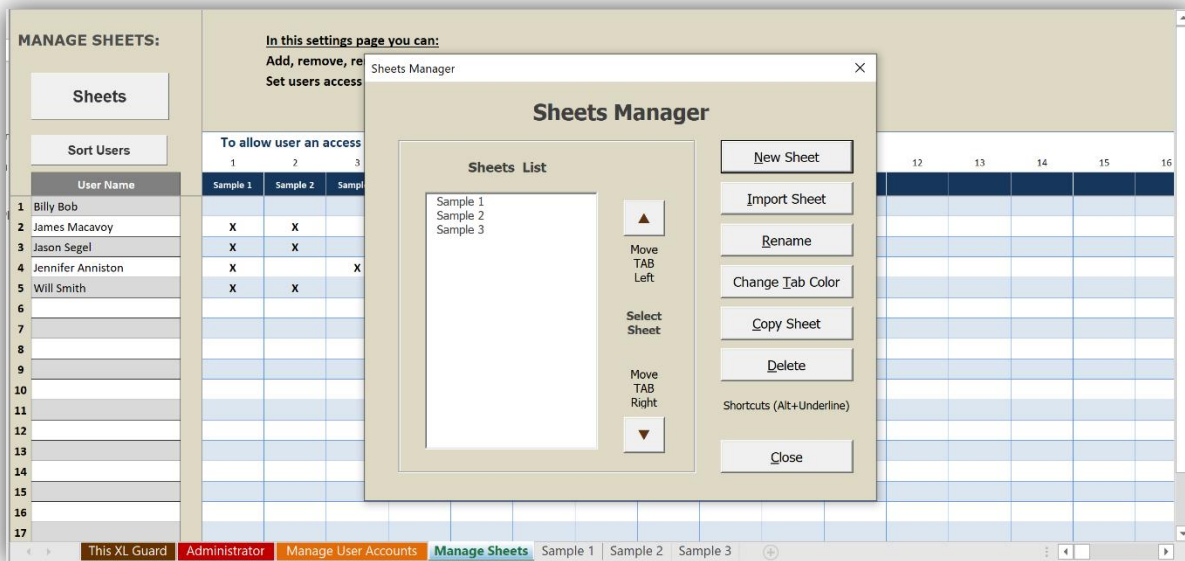


In addition to granting and revoking access to individual sheets, here you can create, arrange, duplicate, and delete new or existing sheets. Users can also import *unprotected* sheets from other Microsoft Excel workbooks.

Click on the Sheets Manager button, and you will be brought to the sheet manager window.

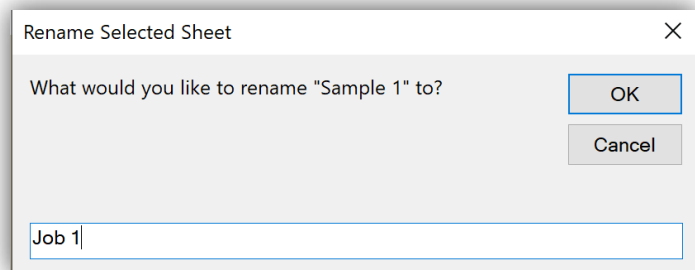
Import Sheets, see dedicated section below.

New Sheet: Clicking this button will prompt you to name a new sheet, which will then populate the list on the left-hand side of the window, and create the corresponding tabs at the bottom of the screen. See the example below:



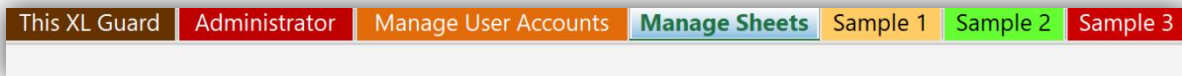
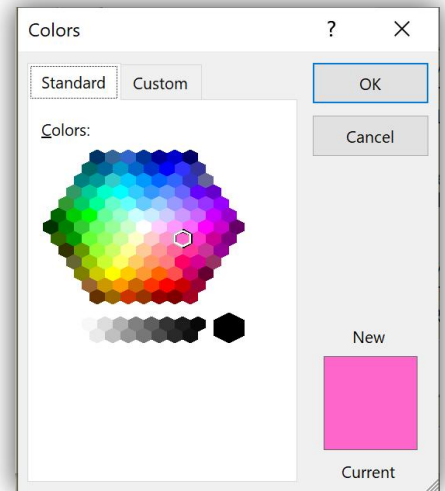
Rename: If you wish to rename a particular sheet, select that sheet from the list and click the Rename button.

You will see the following window, where you can update your sheet as desired.



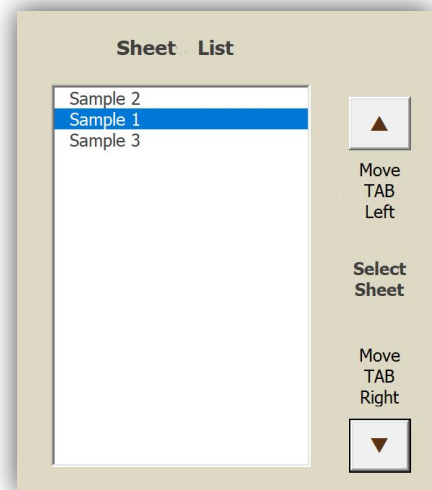
Tab Color: If you want to give your new tabs distinctive colors, select the corresponding sheet from the list and click the Change Tab Color button.

Select the desired color from the new window (see example to the right), then click OK. You will see that the tab(s) at the bottom of the page have updated to the selected color.



Other Features: In addition to the features described above, you can easily duplicate or delete a selected sheet by clicking the Copy Sheet or Delete buttons as needed.

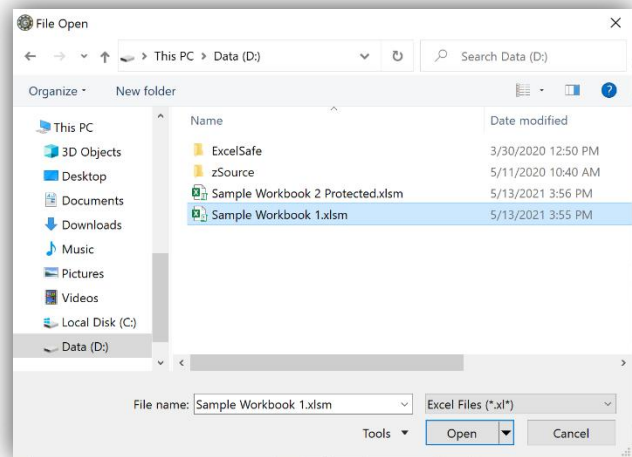
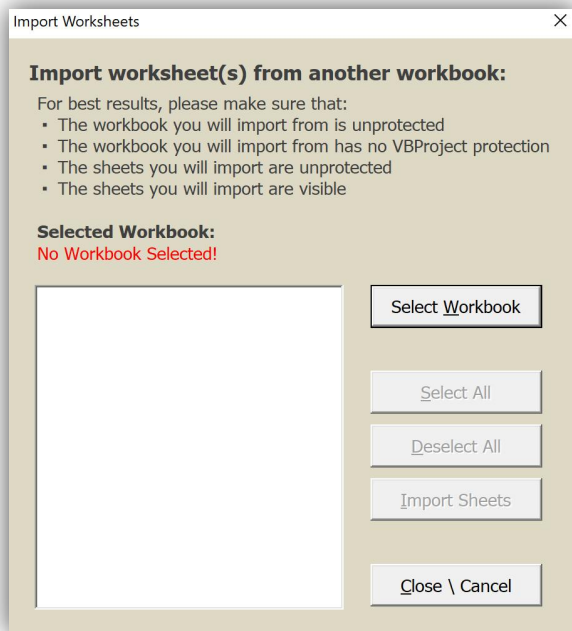
You may also change the arrangement of tabs by using the arrow keys to the right of the list. Select the sheet you wish to move, and press the up or down arrow until the sheet is in the position you wish it to be in.



Import Sheets

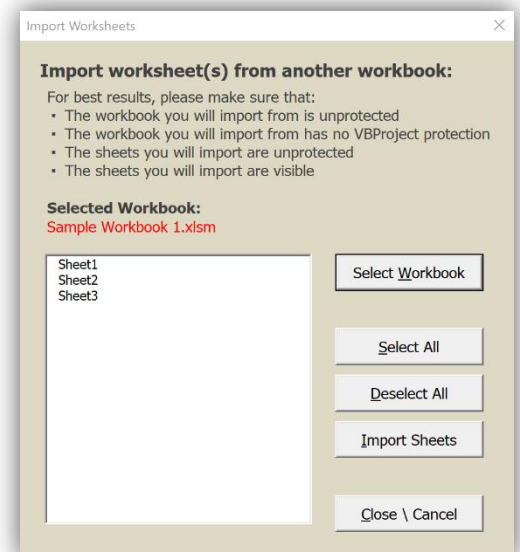
Also present through the Manage Sheets button are the import option. If you have sheets on existing workbooks that you would like to import and protect using the XL Guard Workgroup Edition, click the Import button to open a new window from which you can select a workbook and then the sheets to import.

Once the window has opened, click the Select Workbook button, where you will be able to choose the desired Excel file (.xls, .xlsm, .xlsx, .xltm, etc.) from your file explorer.



After you select your Excel file and click Open, the available sheets within the workbook will appear in the list on the left.

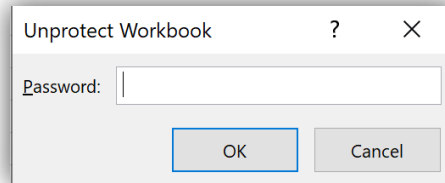
Once you can see the available sheets, you may select whichever sheets you wish to add to your protected workbook and click the Import Sheets button, after which they will be added to your workbook.



If the workbook or sheet that you are attempting to import is password protected, you will be prompted to enter the password before the file can be imported. This is to protect the data of other Excel users.



Alternately, before attempting to import, you can open the Excel file that you wish to import, go to the Review tab, and press the Unprotect Workbook or Unprotect Sheet button, enter the password to unprotect and then save the file.



Workbooks with Protected VBA Code:

- If a workbook include password protected VBA Project module, you must remove the password from the VBA Project before attempting to import and then save the workbook.
- After selecting the desired sheets to import (from the unprotected VBA Project workbook), any VBA code will be stripped from the imported sheets.
- Once you imported the desired worksheet/s you can password protected the VBA project again.

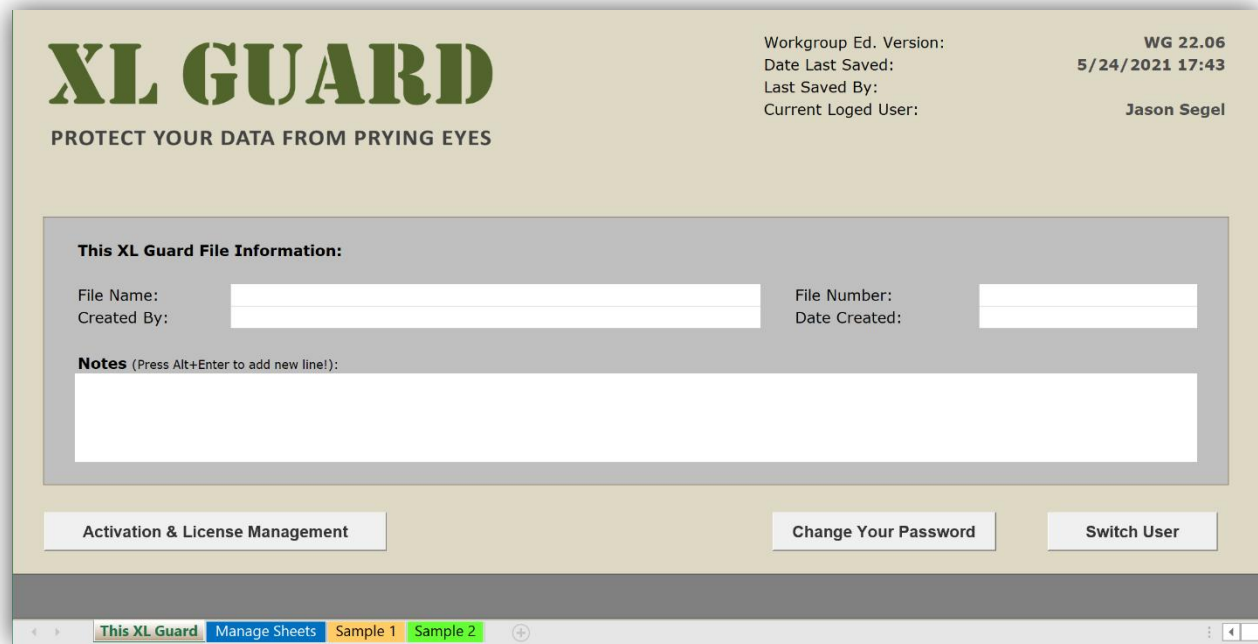
This XL Guard Tab

This tab will act as a homepage for both the administrator and standard users of the application.

File Information

When first using the application, you will likely want to start inserting information about this particular workbook. This information can include:

- A unique descriptive name for the file
- The name of the document creator
- A unique number or code for the file depending on your record-keeping preferences
- The date that the workbook was created
- Additional information or notes regarding the intended purpose or use for the particular workbook



The above image may vary from your version

The top right corner of XL Guard Tab will display the current application version, the last time the workbook was saved, the last user to save the workbook, and the user currently logged in.

Once you have filled out the form to your satisfaction, you can scroll down to insert additional information as needed, the Additional information section is pictured below:

The 'Additional information' section consists of four separate form panels arranged in a 2x2 grid. Each panel has a 'Custom Title:' label at the top. The top-left panel contains labels for 'Project Name:', 'Street Address:', 'City:', 'State:', 'Zip Code:', 'Phone:', and 'Email:', each followed by a text input field. The top-right panel contains labels for 'Name 1:' through 'Name 7:', each followed by a text input field. The bottom-left panel contains labels for 'Name 1:' through 'Name 7:', each followed by a text input field. The bottom-right panel contains labels for 'Name 1:' through 'Name 7:', each followed by a text input field.

Change Logged-in User Password

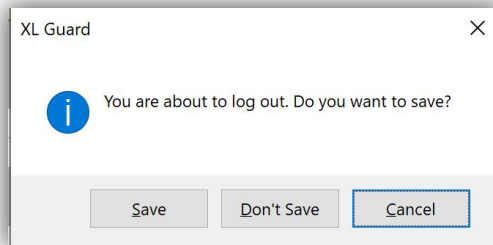
While the administrator is able to change their password through their personally assigned tab, all standard users must use the Change Password button found on the This XL Guard tab. After clicking the button, users will be presented the following window, where they can update their password as desired.

Note: Users are strongly advised not to use passwords which they use on other devices and applications, as these passwords are all visible to the administrator at all times.

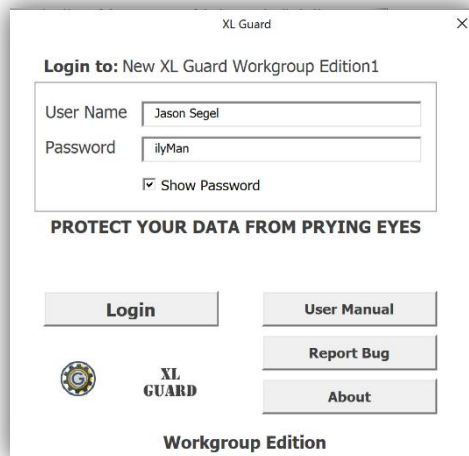
The 'Password Reset' dialog box has a title bar with a close button (X). Inside the dialog, there is a section titled 'Reset Your Password'. Below this title are three text input fields: 'Enter your Old password', 'Enter your new password', and 'Verify your new password'. At the bottom of the dialog is a 'Confirm' button.

Switch User

If you need to switch user without closing the application, click the Switch User button. You will be prompted to save the file before logging out, this is highly recommended.



Enter the desired username and password, then click on the login button!



Support

Thank you for choosing the XL Guard Workgroup Edition. To report any bugs or request support for your paid application, please reach out to support@XLforms.com.