

Chapter 11

Sharing and Reviewing Documents

This PDF is designed to be read onscreen, two pages at a time. If you want to print a copy, your PDF viewer should have an option for printing two pages on one sheet of paper, but you may need to start with page 2 to get it to print facing pages correctly. (Print this cover page separately.)

Copyright

This document is Copyright © 2005–2009 by its contributors as listed in the section titled **Authors**. You may distribute it and/or modify it under the terms of either the [GNU General Public License](#), version 3 or later, or the [Creative Commons Attribution License](#), version 3.0 or later.

All trademarks within this guide belong to their legitimate owners.

Authors

Spencer E. Harpe
Peter Kupfer
Sigrid Kronenberger
Andy Brown
Jean Hollis Weber

Feedback

Please direct any comments or suggestions about this document to:
authors@user-faq.openoffice.org

Publication date and software version

Published 22 May 2009. Based on OpenOffice.org 3.1.



*You can download
an editable version of this document from
<http://oooauthors.org/en/authors/userguide3/published/>*

Contents

Copyright.....	2
Introduction.....	4
Sharing documents (collaboration).....	4
Setting up a spreadsheet for sharing.....	4
Opening a shared spreadsheet.....	4
Saving a shared spreadsheet.....	5
Tracking changes.....	6
Preparing a document for review (optional).....	6
Identifying copies of spreadsheets.....	6
Recording changes.....	7
Adding comments to changes.....	9
Editing comments.....	10
Adding notes.....	10
Editing notes.....	11
Formatting notes.....	12
Finding notes using the Navigator.....	12
Reviewing changes.....	12
Viewing changes.....	13
Accepting or rejecting changes.....	14
Merging documents.....	15
Comparing documents.....	16
Saving versions.....	17

Introduction

Basic editing techniques are discussed in Chapter 2 (Entering, Editing, and Formatting Data). This chapter covers methods for editing shared documents: sharing documents (collaboration), recording changes, adding comments and notes, reviewing changes, merging and comparing documents, and saving and using document versions.

Sharing documents (collaboration)

In OpenOffice.org Writer, Impress, and Draw, only one user at a time can open any document for writing. In Calc, many users can open the same spreadsheet for writing at the same time.

Each user who wants to collaborate should be sure to enter a name on the **Tools > Options > OpenOffice.org > User Data** page.

Some commands are not available (grayed out) when change tracking or document sharing is activated.

Setting up a spreadsheet for sharing

You can set up a spreadsheet for sharing when you create it or at any time after creation.

With the spreadsheet document open, choose **Tools > Share Document** to activate the collaboration features for this document. A dialog (Figure 1) opens where you can choose to enable or disable sharing. If you enable sharing, the document is saved in shared mode and **(shared)** is shown on the title bar.

The **Tools > Share Document** command can be used to switch the mode for a document from unshared to shared. However, if you want to use a shared document in unshared mode, you need to save the shared document using another name or path. This creates a copy of the spreadsheet that is not shared.

Opening a shared spreadsheet

When you open a spreadsheet document that is in shared mode, you see a message that the document is in shared mode and that some features are not available in this mode. You can choose to disable this message for the future. After clicking **OK**, the document is opened in shared mode.

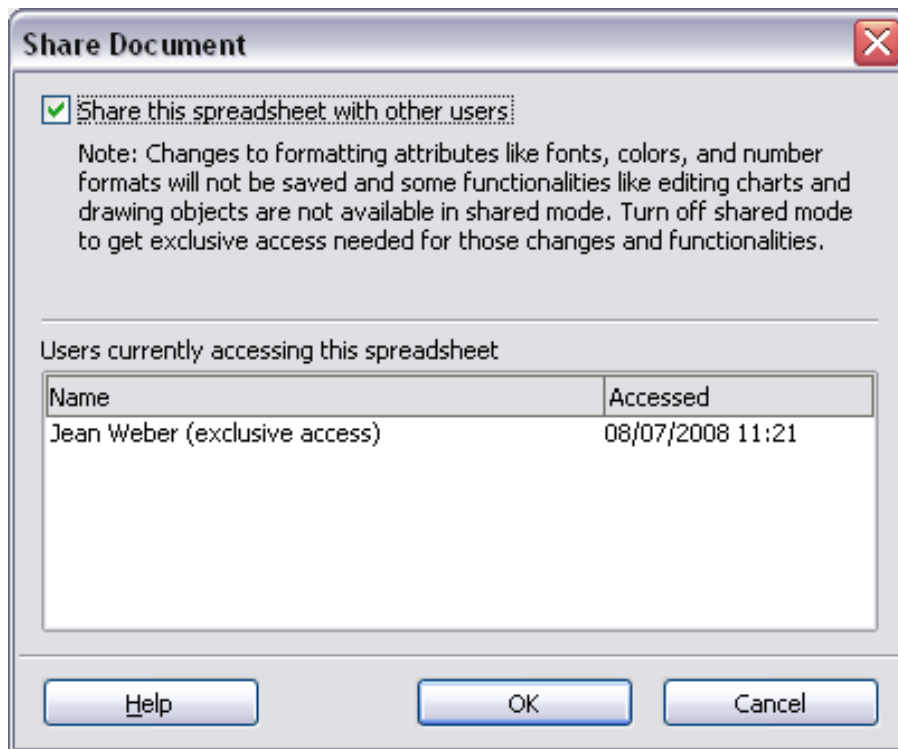


Figure 1: Choosing to share a spreadsheet

Saving a shared spreadsheet

When you save a shared spreadsheet, one of several situations may occur:

- If the document was not modified and saved by another user since you opened it, the document is saved.
- If the document was modified and saved by another user since you opened it:
 - If the changes do not conflict, the document is saved.
 - If the changes conflict, the Resolve Conflicts dialog is shown. You must decide for each conflict which version to keep, yours or the other person's. When all conflicts are resolved, the document is saved. While you are resolving the conflicts, no other user can save the shared document.
- If another user is trying to save the shared document and resolve conflicts, you see a message that a merge-in is in progress. You can choose to cancel the Save command for now, or retry saving later.

When you successfully save a shared spreadsheet, the document shows the latest version of all changes that got saved by all users. A message that foreign changes have been added is shown when another user also changes some contents.

Tracking changes

You can use several methods to keep track of changes you or others made to a document.

- You can use change marks to show added or deleted material and changed formatting. Later, you or another person can review and accept or reject each change.
- If you are not using file sharing, you can make changes to a copy of the document (stored in a different folder, under a different name, or both), then use Calc to compare the files and show the changes. See page 16.
- You can save versions that are stored as part of the original file. See page 17.

Reviewers can leave notes in the document or make comments attached to specific changes.

Preparing a document for review (optional)

When you send a document to someone else to review or edit, you may want to prepare it first so that the editor or reviewer does not have to remember to turn on the revision marks. After you have protected the document, any user must enter the correct password in order to turn off the function or accept or reject changes.

- 1) Open the document and make sure that the **Edit > Changes > Record** menu item has a check mark next to it, indicating that change recording is active.
- 2) (Optional) Click **Edit > Changes > Protect Records**. On the Protect Records dialog, type a password (twice) and click **OK**.

	Passwords must contain at least five characters.
Note	It is not necessary to password protect the document while preparing it for review.

Identifying copies of spreadsheets

When not using the document sharing feature, it is important to keep track of the different copies of the document. This can be done either in the file name or in the file title. If you have not provided a file title in the spreadsheet's properties, the spreadsheet's filename is displayed in the title bar. To set the title of the spreadsheet, select **File > Properties > Description**.

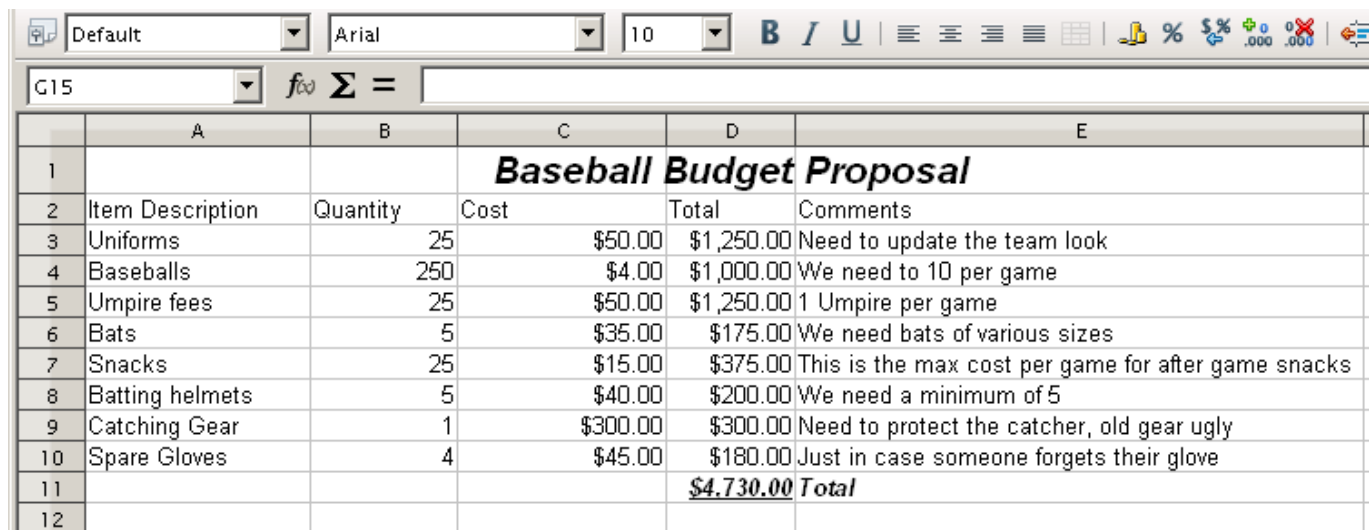
Recording changes

For this chapter we will work with a budget proposal for a baseball team.

You are the sponsor of a youth baseball team. The coach has submitted a budget to you for the season and you need to edit the costs and return it to her.

You are concerned that if you just make the changes then the coach won't see the changes you made. You decide to use Calc with the record changes feature so that the coach can easily see the change you have made.

Figure 2 shows the budget spreadsheet your coach submitted.



	A	B	C	D	E
1			Baseball Budget Proposal		
2	Item Description	Quantity	Cost	Total	Comments
3	Uniforms	25	\$50.00	\$1,250.00	Need to update the team look
4	Baseballs	250	\$4.00	\$1,000.00	We need to 10 per game
5	Umpire fees	25	\$50.00	\$1,250.00	1 Umpire per game
6	Bats	5	\$35.00	\$175.00	We need bats of various sizes
7	Snacks	25	\$15.00	\$375.00	This is the max cost per game for after game snacks
8	Batting helmets	5	\$40.00	\$200.00	We need a minimum of 5
9	Catching Gear	1	\$300.00	\$300.00	Need to protect the catcher, old gear ugly
10	Spare Gloves	4	\$45.00	\$180.00	Just in case someone forgets their glove
11				\$4,730.00	Total
12					

Figure 2: Baseball budget spreadsheet

Looking over the figures, you see a few places where money could be saved:

- Post-game snacks can be bought by parents.
- New uniforms can wait; only buy 10 to replace damaged ones.
- Buy cheaper baseballs.
- Only buy 2 spare gloves.

To make these changes, use the record changes feature in Calc. To start Calc recording changes:

- 1) Open the Budget Spreadsheet.
- 2) Select **Edit > Changes > Record** from the menu bar.
- 3) Begin editing the document.

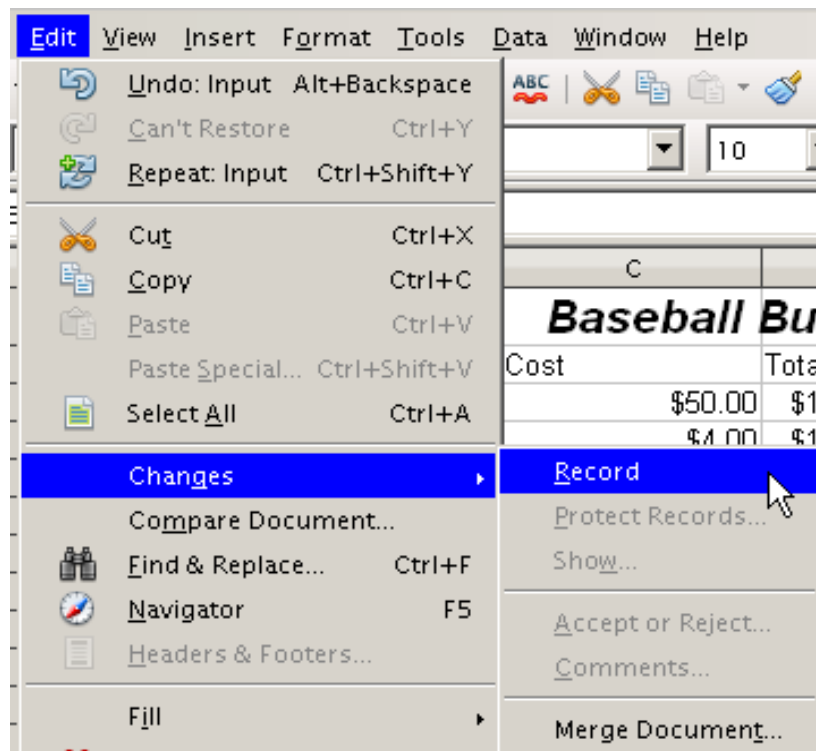


Figure 3: Activating change recording

A colored border, with a dot in the upper left-hand corner, appears around a cell where changes were made (Figure 4). Other reviewers then quickly know which cells were edited. A deleted column or row is marked by a heavy colored bar.

	A	B	C	D	E
1			Baseball Budget Proposal		
2	Item Description	Quantity	Cost	Total	Comments
3	Uniforms	10	\$50.00	\$500.00	Need to update the team look
4	Baseballs	250	\$2.00	\$500.00	We need to 10 per game
5	Umpire fees	25	\$50.00	\$1,250.00	1 Umpire per game
6	Bats	5	\$35.00	\$175.00	We need bats of various sizes
7	Snacks	0	\$15.00	\$0.00	This is the max cost per game for after game snacks
8	Batting helmets	5	\$40.00	\$200.00	We need a minimum of 5
9	Catching Gear	1	\$300.00	\$300.00	Need to protect the catcher, old gear ugly
10	Spare Gloves	2	\$45.00	\$90.00	Just in case someone forgets their glove
11				\$3,015.00	Total
12					

Figure 4: Edited document with red border on changed cells

Tip Some changes, for example cell formatting, are not recorded and marked.

Tip To change the color that indicates changes, select **Tools > Options > OpenOffice.org Calc > Changes**.

When you finish editing the document, you can send it to your coach. However, you may want to explain your rationale for the changes.

You can share your insight in two ways: by adding comments to the changes you made or by adding general notes to the spreadsheet.

Adding comments to changes

Calc automatically adds a comment to any recorded change, describing what was changed (for example, *Cell B4 changed from '9' to '4'*).

Reviewers and authors can add their own comments to communicate with each other why they made the changes.

To add a comment to a change:

- 1) Make the change to the spreadsheet.
- 2) Select the cell with the change.
- 3) Select **Edit > Changes > Comments**. The dialog shown in Figure 5 appears. The automatically-added comment provided by Calc appear in the title bar of this dialog and cannot be edited.

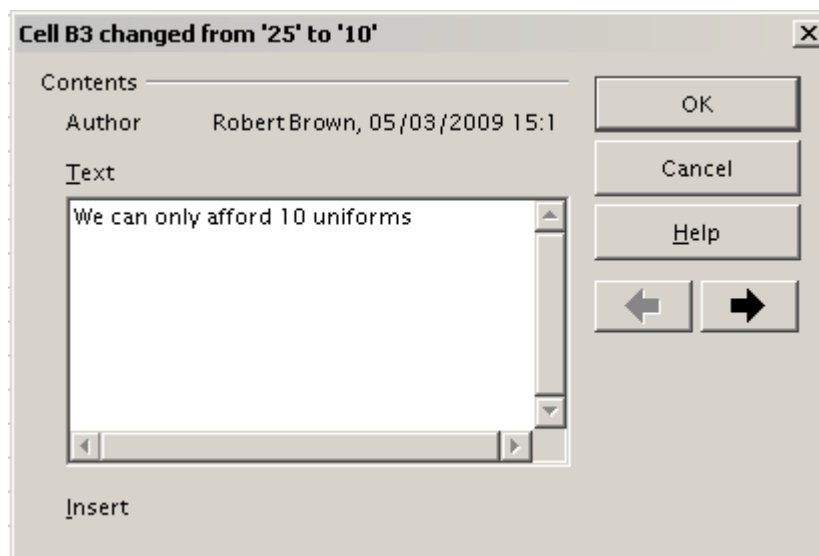


Figure 5: Comment dialog

- 4) Type your comment and click **OK**.

Tip

You can step through your changes one at a time using the left and right arrows on the right hand side of the Comment dialog, and add comments to each change. The title bar for the Comment dialog shows the cell and the change you are commenting on.

After you have added a comment to a changed cell, you can see it by hovering the mouse pointer over the cell, as shown in Figure 6.

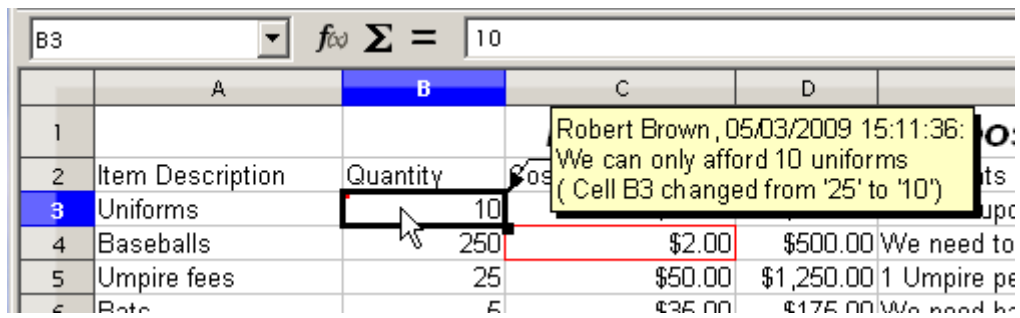


Figure 6: Comment added to cell B3

The comment also appears in the dialog when you are accepting and rejecting changes, as shown in the first line of Figure 11 on page 14.

Editing comments

- 1) Select the cell with the comment that you want to edit.
- 2) Select **Edit > Changes > Comments**. The dialog shown in Figure 5 appears.
- 3) Edit the comment and click **OK**.

Tip

You can step through your comments one at a time using the left and right arrows on the right hand side of the Comment dialog. You do not need to click **OK** after editing each comment; you can save them all at once when you're done editing.

Adding notes

Notes are similar to comments, except that they do not need to be associated with a change, and notes can be formatted but comments cannot. Authors and reviewers often use notes to exchange ideas, ask for suggestions, or brainstorm in the document.

To add a note:

- 1) Select the cell that the note applies to.
- 2) Select **Insert > Note**. The box shown in Figure 7 appears.
- 3) Type the text of your note in the box.
- 4) Click outside the box to close it.

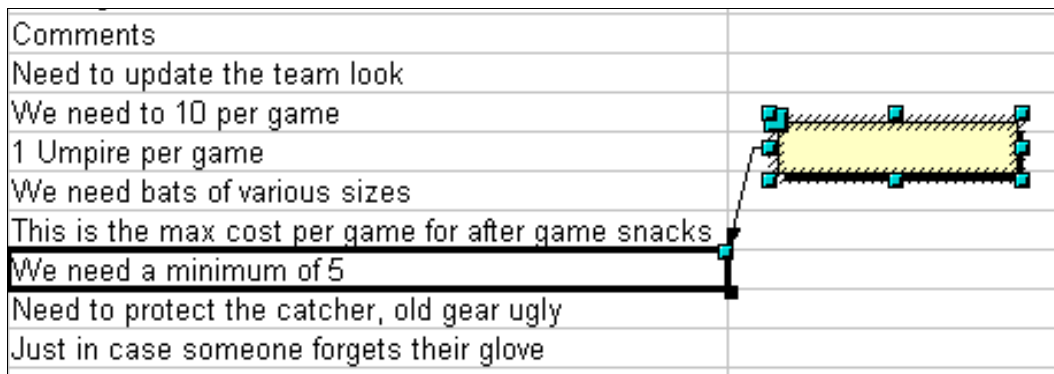


Figure 7: Inserting a note

- 5) Now the cell to which you added the note has a colored dot in the upper right-hand corner, as shown in Figure 8. It does not have a colored border, unless the cell was also changed.

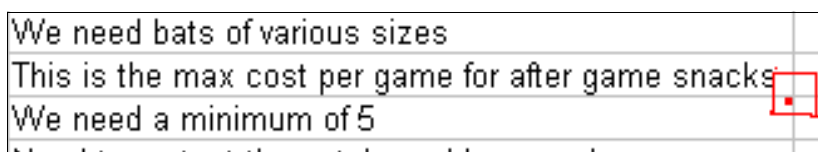


Figure 8: Colored dot in cell containing a note

Tip You can change the colors Calc uses for notes by selecting **Tools > Options > OpenOffice.org > Appearance**.

To view the note you just added, hover the mouse pointer over the cell that has a note; the note appears, as shown in Figure 9.

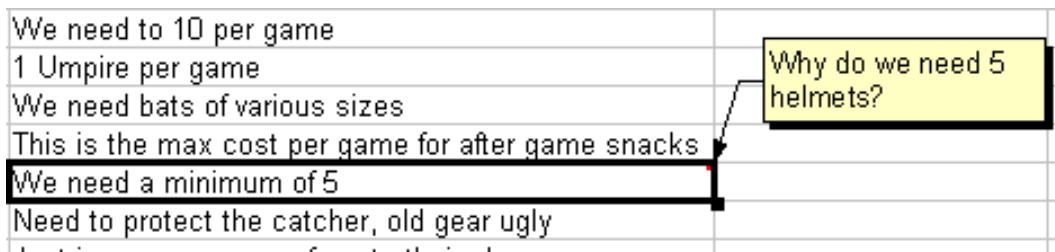


Figure 9: Viewing a note

Editing notes

You can edit and format the text of a note, just as you do for any other text.

- 1) Right-click on the cell containing the note marker, and choose **Show Note** from the pop-up menu.
- 2) Select the note, then double-click on it. The cursor changes to the usual blinking text-entry cursor, and the Formatting toolbar changes to show text attributes.
- 3) When done, click outside the note to deselect it.

Formatting notes

You can change the background color, border style, transparency, and other attributes of a note.

- 1) Right-click on the cell containing the note marker, and choose **Show Note** from the pop-up menu.
- 2) Click on the note itself. The Formatting toolbar changes to show many of the note formatting options. These are the same as the options for formatting graphics; see Chapter 5 (Using Graphics in Calc) for more information.

You can also right-click on the note to see a menu of choices, some of which lead to dialogs in which you can fine-tune the formatting; these dialogs are also discussed in Chapter 5.

- 3) When done, click outside the note to deselect it.

Finding notes using the Navigator

The small note markers in the corners of cells can be difficult to see, so Calc provides another way to find them, by using the Navigator. If any notes are in the spreadsheet, the Navigator shows a + next to the word Notes. Click on this + to display a list of notes. Double-click on the note you want to jump directly to the cell it is associated with.

Reviewing changes

At this point, we are going to change our perspective from the point of view of the team sponsor to that of the coach, so we can see how to review and accept or reject the changes to the document the coach originally wrote.

You are the coach of a youth baseball team and you submitted a potential budget created in Calc to your team sponsor.

Your sponsor has reviewed the document using the record changes feature of Calc. Now, you want to review those changes and accept or reject the counter proposal.

Because the sponsor recorded changes in Calc, you can easily see what changes were made and decide how to act.

Viewing changes

Calc gives you tremendous control over what changes you see when reviewing a document. To change the available filters, select **Edit > Changes > Show**. The dialog shown in Figure 10 opens.

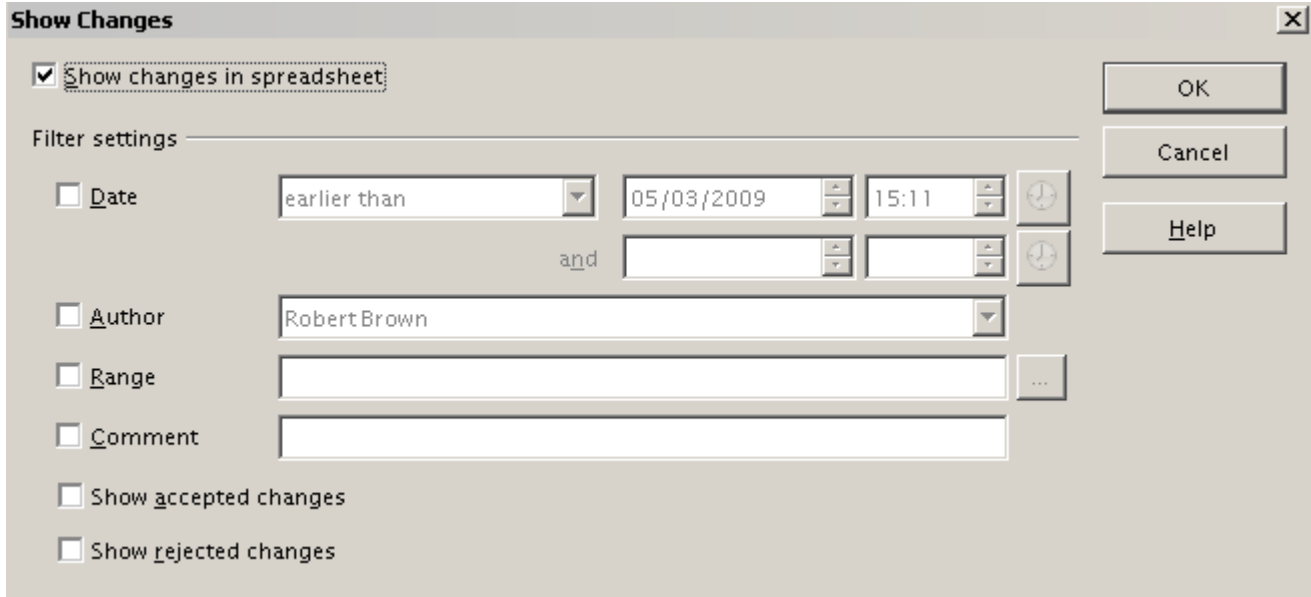


Figure 10: Show changes dialog

Using the different settings, you can control which changes appear on screen. You can filter based on:

- Date – Only changes made in a certain time range are displayed.
- Author – Only changes made by a specific author are displayed. This is especially useful if you have multiple reviewers on the document.
- Range – Only changes made in a specific range of cells are displayed. This is especially useful if you have a large spreadsheet and only want to review a part of it.
- Comment – Searches the content of the comments and only displays changes which have comments that match the search criteria.
- Show accepted changes – Only changes you accepted are displayed.
- Show rejected changes – Only changes you rejected are displayed.

Note

You can also access the filter control in the Accept or Reject Changes dialog shown in Figure 11. Click the *Filter* tab to get a set of options similar to those shown in Figure 8.

Accepting or rejecting changes

When you receive a document back with changes, the beauty of the recording changes system becomes evident. Now, as the original author, you can step through each change and decide how to proceed. To begin this process:

- 1) Open the edited document.
- 2) Select **Edit > Changes > Accept or Reject**. The dialog shown in Figure 11 appears.
- 3) Calc steps through the changes one at a time. You can choose to accept or reject each change as you go through.

The *Comment* column by default contains an explanation of the change that was made. If the reviewer added a comment to the change, it is displayed, followed by the description of the change, as in the first line of Figure 11.

If more than one person has reviewed the document, one reviewer may have modified another reviewer's change. If so, the changes are hierarchically arranged with a plus sign for opening up the hierarchy.

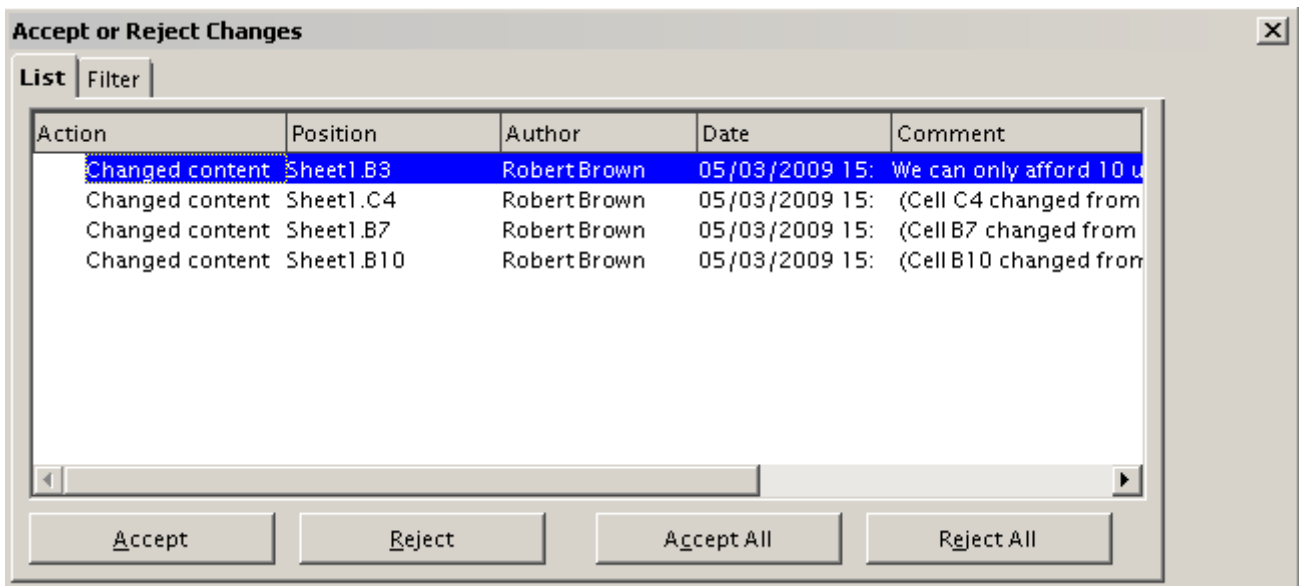


Figure 11: Accept or Reject changes dialog

On the Filter tab of this dialog (not shown here), you can choose how to filter the list of changes: by date, author, cell range, or comments containing specific terms. After selecting the filter criteria, switch back to the List tab to see the results.

Merging documents

You submitted your budget proposal to your sponsor, but you sent it to one of your assistant coaches as well. Both of them returned their revised budget to you at the same time.

You could review each document and the changes separately, but to save time, you want to see both of their revisions simultaneously.

To do this, you can use Calc's merge document feature.

The processes discussed to this point are effective when you have one reviewer at a time. Sometimes, however, multiple reviewers all return edited versions of a document at the same time. In this case, it may be quicker to review all of these changes at once, rather than one review at a time. For this purpose, you can merge documents in Calc.

To merge documents, all of the edited documents need to have recorded changes in them.

- 1) Open the original document.
- 2) Select **Edit > Changes > Merge Document**.
- 3) A file selection dialog opens. Select a file you want to merge and click **OK**.
- 4) After the documents merge, the Accept or Reject Changes dialog opens, as in Figure 12, showing changes by more than one reviewer. If you want to merge more documents, close the dialog and then repeat steps 2 and 3.

Now all of the changes are combined into one document and you can accept or reject the changes. Changes from different authors appear in different colors in the document, as shown in Figure 13. In this example, all of the changes from Peter are blue and the changes from Gina are red.

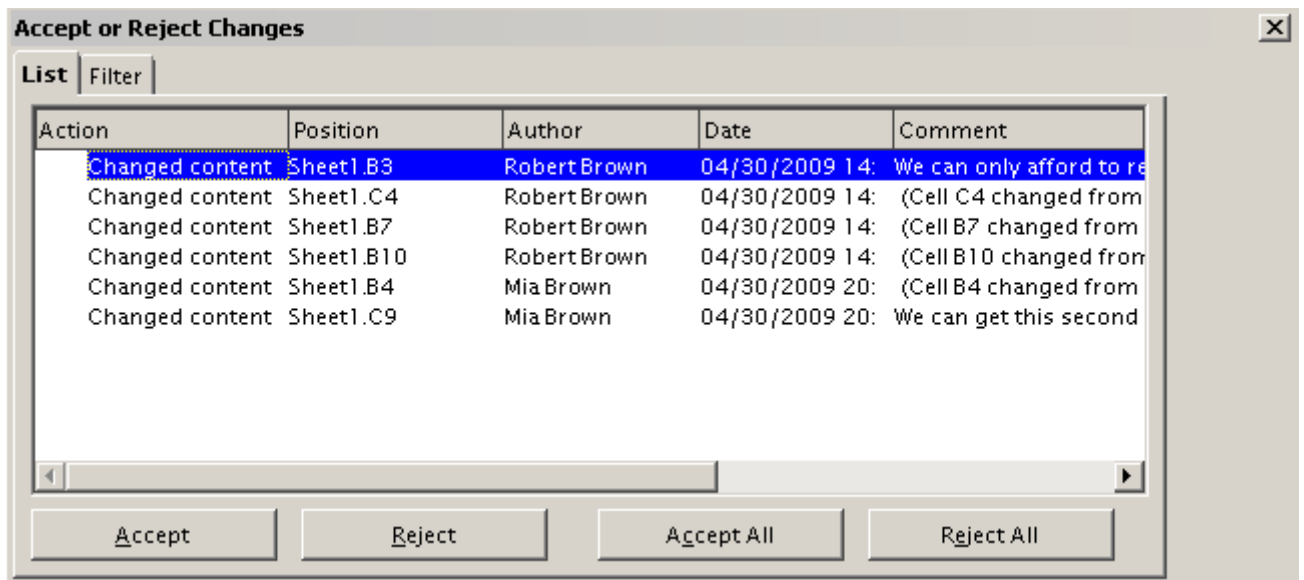


Figure 12: Accept or Reject for merged documents

Baseball Budget Proposal				
Item Description	Quantity	Cost	Total	Comments
Uniforms	10	\$50.00	\$500.00	Need to update the team look
Baseballs	275	\$2.00	\$550.00	We need to 10 per game
Umpire fees	25	\$50.00	\$1,250.00	1 Umpire per game
Bats	5	\$35.00	\$175.00	We need bats of various sizes
Snacks	0	\$15.00	\$0.00	This is the max cost per game for after game snacks
Batting helmets	5	\$40.00	\$200.00	We need a minimum of 5
Catching Gear	1	\$175.00	\$175.00	Need to protect the catcher, old gear ugly
Spare Gloves	2	\$45.00	\$90.00	Just in case someone forgets their glove
			\$2,940.00	Total

Figure 13: Merged documents with different author colors

Comparing documents

Sometimes when sharing documents reviewers may forget to record the changes they make. This is not a problem with Calc. If a reviewer edits a spreadsheet but forgets to record the changes, Calc can find the changes if you compare documents.

In order to compare documents you need to have the original document and the one that is edited. To compare them:

- 1) Open the edited document that you want to compare with the original document.
- 2) Select **Edit > Compare Document**.
- 3) An open document dialog appears. Select the original document and click **Insert**.

Calc finds and marks the changes as follows:

- All data that occurs in the edited document but not in the original is identified as inserted.
- All data that is in your original document but is not in the edited document is identified as deleted.
- All data that is changed, is marked as changed.

From this point you can go through and accept or reject changes as you could normally.

Saving versions

Most documents go through many drafts. It is often useful to save all versions of a document. You do this by saving a copy of the document (under a different name) after each revision, or you could use Calc's version feature.

Caution



If you do a **Save As...** of a document with different versions stored in it, the old versions are not saved in the new file.

To use version management in Calc:

- 1) Select **File > Versions**. The Versions dialog (Figure 14) opens.

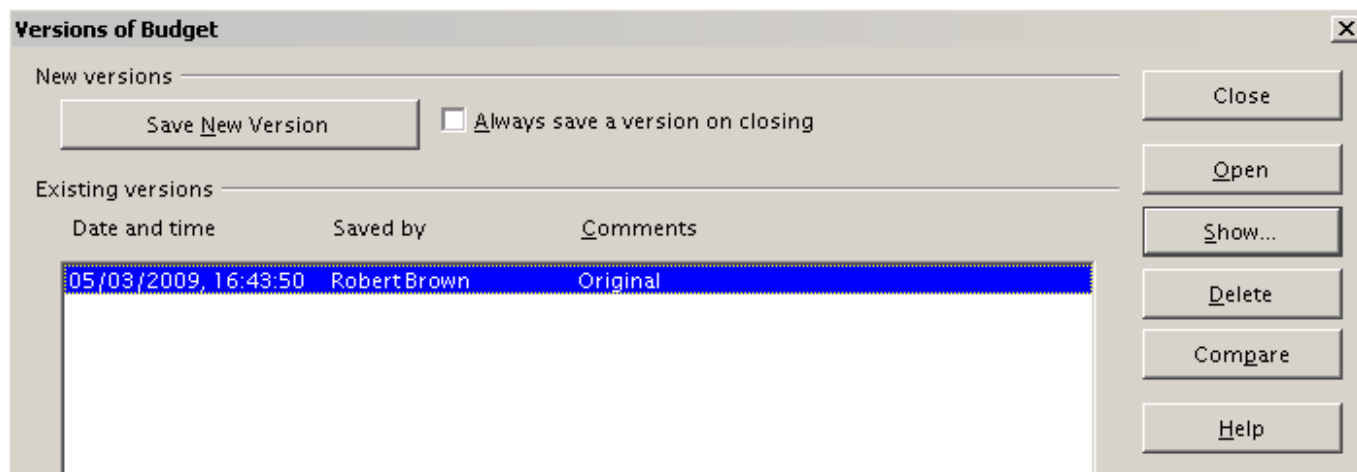


Figure 14: Version management dialog

- 2) Click the **Save New Version** button to save a new version.
- 3) A dialog opens where you can enter comments about this version.

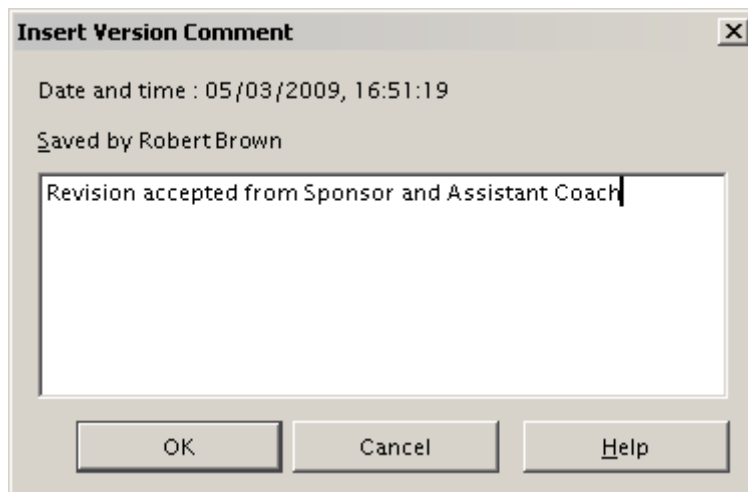


Figure 15: Version comment dialog

- 4) After you enter your comment and click **OK**, the version is included in the version list.

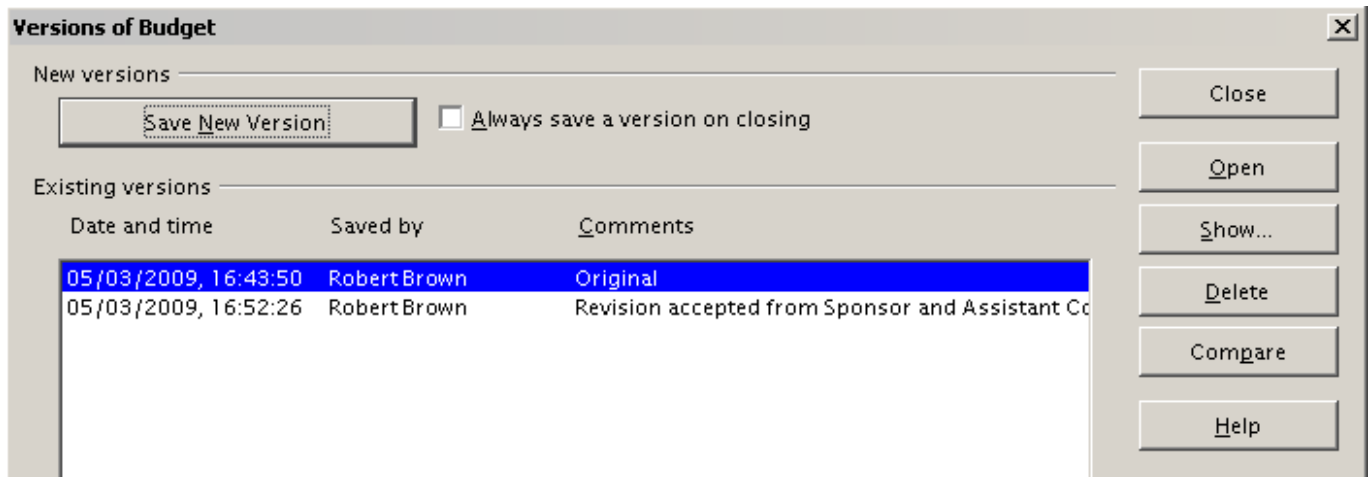


Figure 16: Updated version list

Now when you save the file, both versions are saved in the same file. From this point you can:

- Open an old version – Select the version and click the **Open** button and a read-only version of a previous version opens.
- Compare all versions – Clicking the **Compare** button performs an action similar to merging documents together. An Accept or Reject Changes dialog opens showing all of the changes through the different versions.
- Review the comments – Select a version and click the **Show** button to display the full comments made by yourself or other reviewers.

Note

The new file is bigger in size, as if two spreadsheets were saved together.
