



Calc Guide

Chapter 11

Sharing and Reviewing

Spreadsheets

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This book is adapted and updated from the *LibreOffice 6.4 Calc Guide*.

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Note

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Using LibreOffice on macOS

Some keystrokes and menu items are different on macOS from those used in Windows and Linux. The table below gives some common substitutions for the instructions in this book. For a more detailed list, see the application Help and Appendix A (Keyboard Shortcuts) to this guide.

| <i>Windows or Linux</i> | <i>macOS equivalent</i> | <i>Effect</i> |
|--|--|--------------------------------|
| Tools > Options menu selection | LibreOffice > Preferences | Access setup options |
| Right-click | Control+click and/or right-click depending on computer setup | Open a context menu |
| <i>Ctrl</i> (<i>Control</i>) | ⌘ (<i>Command</i>) | Used with other keys |
| <i>Ctrl+Q</i> | ⌘+Q | Exit / quit LibreOffice |
| <i>F11</i> | ⌘+T | Open the Sidebar's Styles deck |

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Introduction

This chapter covers methods for collaboration through sharing and reviewing spreadsheets: simultaneous editing, recording changes, adding comments, reviewing changes, merging and comparing documents, saving, and using document versions.

Some menu commands are not available (grayed out) when sharing or change tracking are active.

Sharing spreadsheets

Sharing a spreadsheet allows several users to open the same file for editing at the same time. The spreadsheet needs to be on a shared drive, server, website, or similar. Some conditions must be met on operating systems with user permission management:

- The shared file needs to reside in a location which is accessible by all collaborators.
- The file permissions for both the document and the corresponding lock file need to be set so that all collaborators can create, delete, and change the files.

Consult your operating system's documentation for details on setting file permissions. See also "Opening and saving files on remote servers" in Chapter 1, *Introducing LibreOffice*, in the *Getting Started Guide*.

Tip

In order to correctly identify the changes, each collaborator should enter their name in **Tools > Options > LibreOffice > User Data** on the Menu bar.

Setting up a spreadsheet for sharing

With the spreadsheet open, choose **Tools > Share Spreadsheet** on the Menu bar to enable or disable sharing.

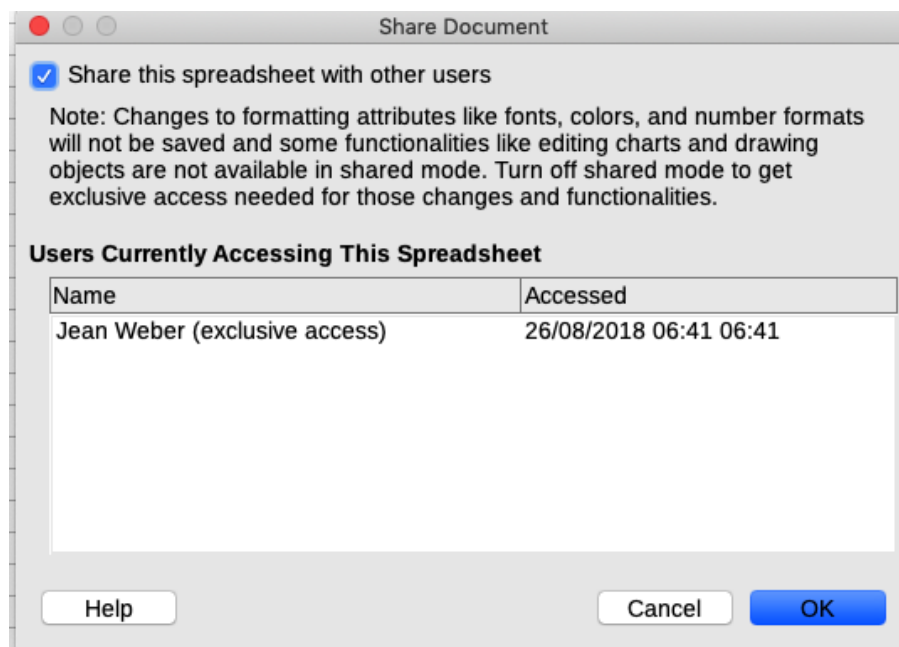


Figure 1: Share Document dialog

To enable sharing, select the checkbox at the top of the dialog (Figure 1) and click **OK**. If the spreadsheet has been saved previously, a message appears stating that you must save it to

activate shared mode; click **Yes** to continue. If the spreadsheet has not been saved previously, the Save dialog opens. After saving, the text “(shared)” is shown on the Title bar, after the title.

Tools > Share Spreadsheet on the Menu bar can also be used to switch a spreadsheet from shared to unshared. However, this means that other users can no longer edit it. Instead, you may wish to save a copy of the shared spreadsheet using another name or path, thus creating a copy of the shared spreadsheet, and then switch the copy to unshared.

Opening a shared spreadsheet

When you open a shared spreadsheet, a message appears stating that some features are not available in this mode. After reading it, click **OK** to remove the message and open the document. You can select the option to not show the warning again.

The following features are disabled in a shared spreadsheet:

Edit > Track Changes, except for **Merge Document**

Insert > Media > Audio or Video

Insert > Comment

Insert > Object

Insert > Chart

Insert > Named Range or Expression

Insert > Pivot Table

Insert > Floating Frame

Insert > Fontwork

Insert > Signature Line

Format > Merge Cells

Format > Print Ranges

Sheet > Move or Copy Sheet

Sheet > Delete Sheet

Sheet > Insert Sheet from File

Sheet > Named Ranges and Expressions

Sheet > Rename Sheet

Sheet > Sheet Tab Color

Data > Define Range

Data > Sort

Data > Sort Ascending

Data > Sort Descending

Data > Subtotals

Data > Validity

Data > Multiple Operations

Data > Consolidate

Data > Group and Outline

Data > Pivot Table

Tools > Protect Sheet

Tools > Protect Spreadsheet Structure

Saving a shared spreadsheet

When you save a shared spreadsheet, if it has not been modified and saved by another user since you opened it, it is saved as usual.

If the spreadsheet has been modified and saved by another user since you opened it, one of the following will occur:

- If the changes do not conflict, the document is saved, the message “Your spreadsheet has been updated with changes saved by other users” appears, and any cells modified by the other user are shown with a red border.

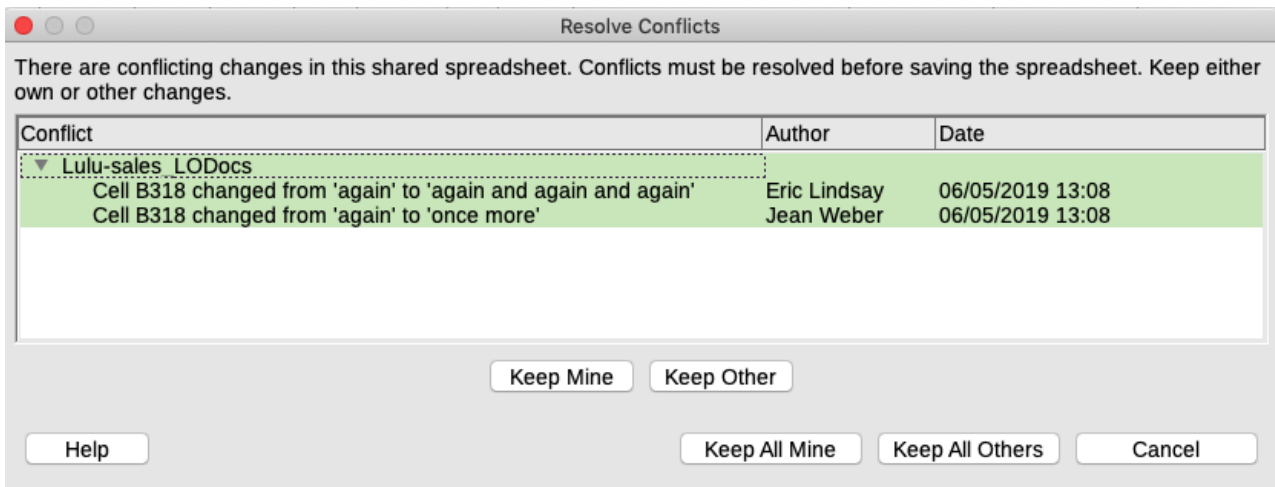


Figure 2: Resolve Conflicts dialog

- If the changes conflict, the Resolve Conflicts dialog (Figure 2) 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 spreadsheet and resolve conflicts, they see a message that the file is locked due to a merge in progress. They can cancel the Save command and retry saving later.

When you successfully save a shared spreadsheet, the document shows the latest version of all changes saved by all users.

Reviewing documents

You can use several methods to review, edit, and comment on a spreadsheet. Each reviewer works on a separate copy of the document.

- You can use change marks to show added and deleted material. Later, you or another person can review the document and accept or reject each change.
- 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 “Comparing documents” on page 12.
- You can save versions that are stored as part of the original file. See “Saving versions” on page 13.

Reviewers can leave comments in the document, either attached to specific changes or standalone.

Preparing a document for review (optional)

Before you send a spreadsheet to someone else to review or edit, you may want to set it up so that the editor or reviewer does not have to remember to turn on the revision marks.

After you have turned on revision marks, you can optionally password protect the spreadsheet so that any user must enter the correct password in order to accept or reject changes.

- 1) Open the spreadsheet and select **Edit > Track Changes > Record** on the Menu bar, or press *Ctrl+Shift+C*. You can also use **File > Properties > Security** and select **Record changes**.
- 2) If you want to protect the spreadsheet, click **Edit > Track Changes > Protect** on the Menu bar. On the Protect Records dialog, type a password (twice) and click **OK**. You can also use **File > Properties > Security** and click the **Protect** button to open the similar Enter Password dialog. Guidelines for choosing a suitable password are contained in the Help.

Recording changes

To record changes, open the spreadsheet and make sure that the **Edit > Track Changes > Record** menu item has a check mark next to it, indicating that change recording is active.

Caution

After making some changes, do **not** turn off change recording. Turning off change recording in Calc causes all the recorded changes to be accepted and no longer shown as changes. A message box will warn if you try to do this.

When changes are made in a cell, a colored border with a dot in the upper left-hand corner appears around the cell (Figure 3). A deleted column or row is marked by a heavy colored bar.

| | A | B | C | D | E |
|----|-------------------------|-----------------|---------------------------------|-------------------|------------------------|
| 1 | | | <i>Baseball Budget Proposal</i> | | |
| 2 | Item Description | Quantity | Cost/Item | Total | Comments |
| 3 | Uniforms | 10 | \$50.00 | \$500.00 | Need to update the tea |
| 4 | Baseballs | 250 | \$2.00 | \$500.00 | We need 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 variou |
| 7 | Snacks | 0 | \$15.00 | \$0.00 | Max cost per game for |
| 8 | Batting helmets | 5 | \$40.00 | \$200.00 | We need a minimum o |
| 9 | Catching gear | 1 | \$300.00 | \$300.00 | Need to protect catche |
| 10 | Spare gloves | 2 | \$45.00 | \$90.00 | Just in case someone |
| 11 | | | | \$3,015.00 | Total |
| 12 | | | | | |

Figure 3: Edited document with red border on changed cells

To see the changed information, hover the mouse pointer over the changed cell. See Figure 4.

| | | | | | |
|---|-------------------------|-----------------|-------------------------------------|-----------------------------------|----------------|
| 1 | | | Ba Jean Weber, 26/05/2019 08:50:29: | | |
| 2 | Item Description | Quantity | Cost | Cell B3 changed from '25' to '10' | |
| 3 | Uniforms | 10 | \$50.00 | \$500.00 | Need to updat |
| 4 | Baseballs | 250 | \$2.00 | \$500.00 | We need 10 p |
| 5 | Umpire fees | 25 | \$50.00 | \$1,250.00 | 1 umpire per c |

Figure 4: Showing details of the change

Note

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

Tip

To change the color that indicates a changed cell, select **Tools > Options > LibreOffice Calc > Changes** on the Menu bar.

You may want to explain your rationale for the changes. You can do this by adding comments to the changes you made or by adding general comments to the spreadsheet.

Adding comments to changes

Calc automatically adds to any recorded change a comment that describes what was changed (for example, *Cell B4 changed from '9' to '4'*). Reviewers and authors can add their own comments to explain their reasons for the changes or provide any other helpful insights.

To add a comment to a change:

- 1) Make the change to the spreadsheet.
- 2) Select the cell with the change.
- 3) Choose **Edit > Track Changes > Comment** on the Menu bar. A small dialog opens. Type your comment and click **OK**. See Figure 5.

Note

Do **not** use **Insert > Comment** on the Menu bar or the context menu for this purpose. Comments inserted using that method are handled differently (see “Adding other (general) comments” on page 9) and do not appear in the Manage Changes dialog.

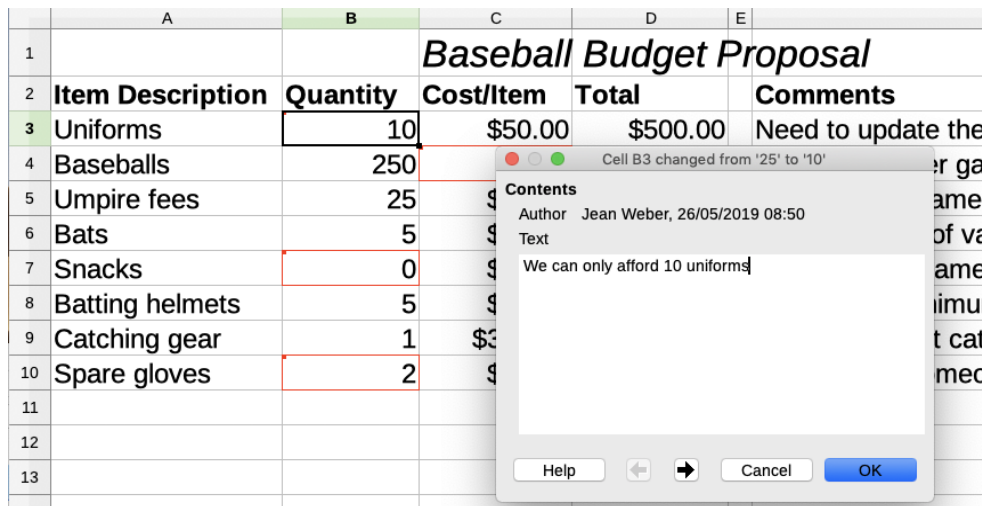


Figure 5: Entering a comment associated with a change

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

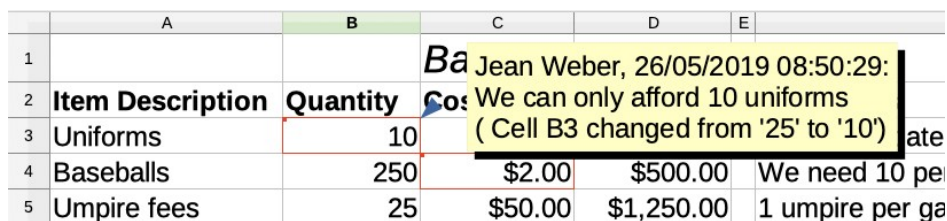


Figure 6: Comment added to cell B3

The comment also appears on the Manage Changes dialog when you are accepting and rejecting changes, as shown in the first line of Figure 10 on page 11.

Editing comments on changes

- 1) Select the cell with the change comment that you want to edit.

- 2) Choose **Edit > Track Changes > Comment** on the Menu bar. The box shown in Figure 5 opens.
- 3) Edit the comment and click **OK**.

The automatically-added comment provided by Calc cannot be edited.

You can move through the comments by using the arrows at the bottom of the dialog.

Adding other (general) comments

Calc provides another type of comment, which authors and reviewers often use to exchange ideas or ask for suggestions.

To add a general comment:

- 1) Select the cell that the comment applies to.
- 2) Select **Insert > Comment** on the Menu bar, or right-click and select **Insert Comment** in the context menu, or press *Ctrl+Alt+C*. The box shown in Figure 7 appears.

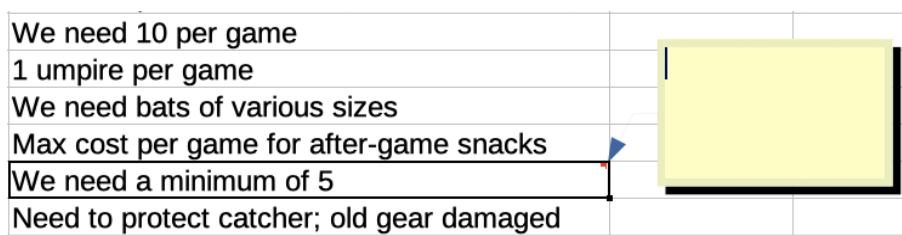


Figure 7: Inserting a comment

- 3) Type your comment in the box, then click outside the box to close it.

Now the cell to which you added the comment 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.

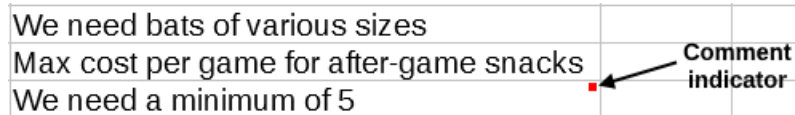


Figure 8: Colored dot in cell containing a comment

Tip

You can change the colors Calc uses for comments by selecting **Tools > Options > LibreOffice > Application Colors** and adjusting the color for *Notes background* in the *Spreadsheet* section.

To view the comment you just added, hover the mouse pointer over the cell that has a comment. The comment appears, as shown below.

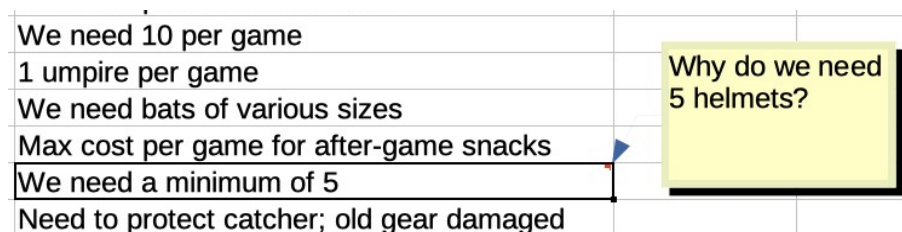


Figure 9: Viewing a comment

✓ Note

If you hover over a cell that has both a change comment and a general comment, both are shown in the displayed tip.

Editing general comments

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

- 1) Right-click on the cell containing the comment marker and choose **Edit comment** in the context menu, or left-click on the cell and press *Ctrl+Alt+C*.
- 2) Calc shows the cell's comment. The cursor changes to the usual text-entry cursor, and the Formatting toolbar changes to show text attributes.
- 3) When editing is done, click outside the comment to deselect it.

Formatting general comments

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

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

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

- 3) When done, click outside the comment to deselect it. To hide the comment again, right-click on the cell and choose **Hide Comment** in the context menu.

Finding general comments

The small comment markers in the corners of cells can be difficult to see, so Calc provides two other ways to find them: by showing all comments and by using the Navigator. To show all general comments, choose **View > Comments** on the Menu bar. To hide all comments, choose **View > Comments** again.

If any general comments are in the spreadsheet, the Navigator shows a symbol (usually a + or an arrow) next to the word *Comments*. Click on this symbol to display a list of comments. Double-click on a comment in the list to jump directly to the cell it is associated with.

✓ Note

View > Comments and the Navigator show general comments but not the comments associated with tracked changes.

Accepting or rejecting changes

When you receive a document with changes, you can step through each change and decide how to proceed. To begin this process:

- 1) Open the edited document.
- 2) Select **Edit > Track Changes > Manage** on the Menu bar. The Manage Changes dialog shown in Figure 10 appears.

- 3) You can step through the changes one at a time, choosing to accept or reject each change as you go through. You can also accept or reject all changes at one time.

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.

If a change has been superseded by a later change (by either the same person or another person), the changes are hierarchically arranged with an expansion symbol for opening up the hierarchy.

Below the list of changes to be accepted or rejected are shown any changes that have previously been dealt with.

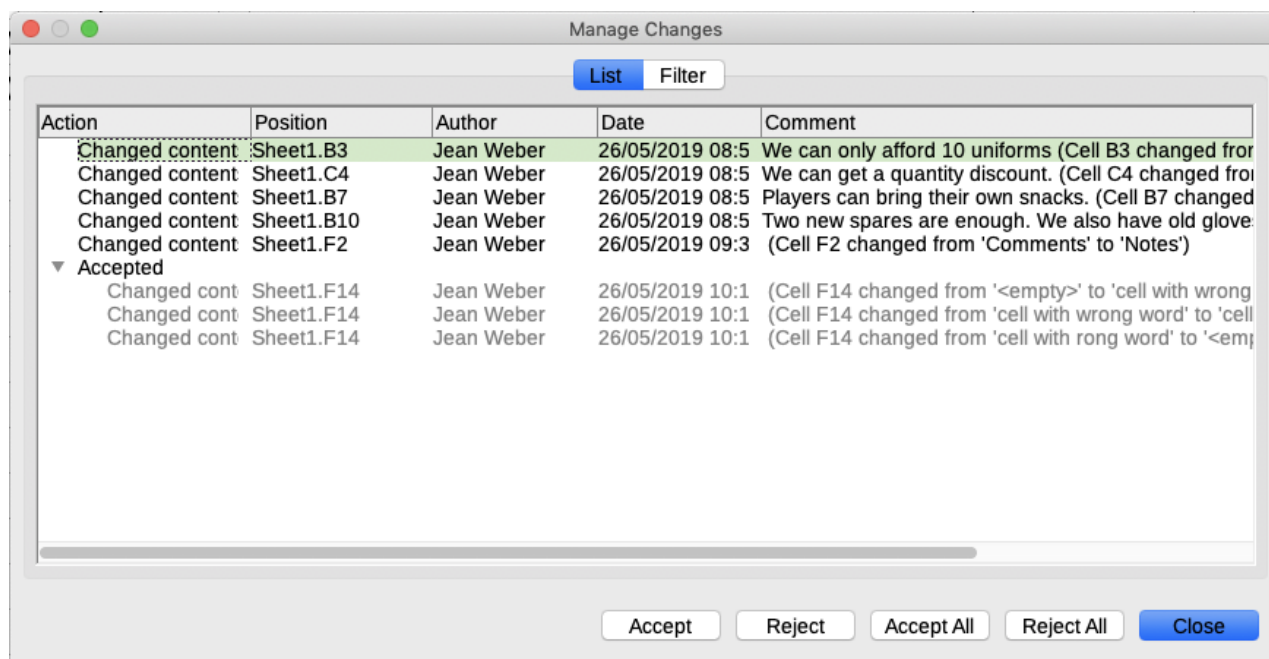


Figure 10: Manage Changes dialog – List tab

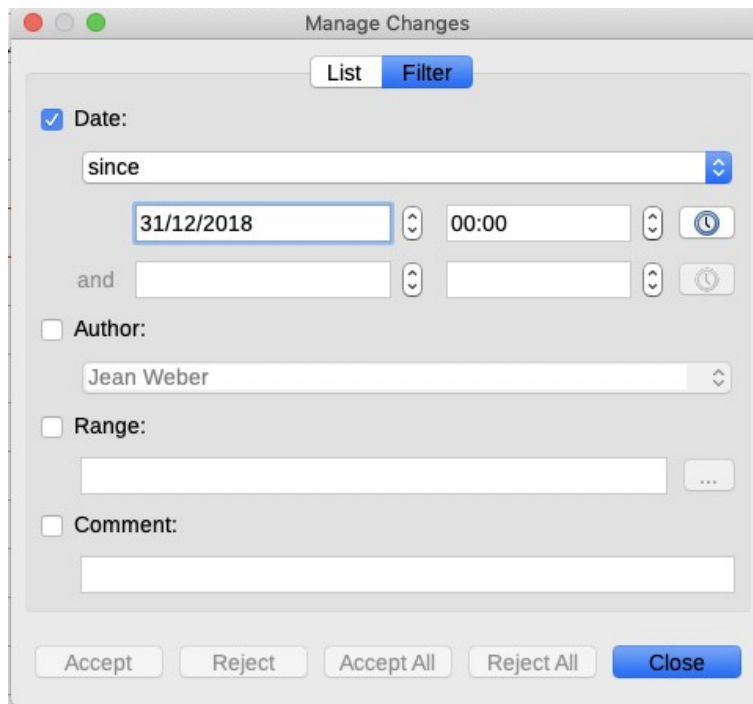


Figure 11: Manage Changes dialog – Filter tab

On the *Filter* tab of this dialog (Figure 11), 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. Filtering the changes affects only the contents of the *List* tab on the dialog, you will not see any filtered results in your spreadsheet.

Merging documents

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 faster to review all of the 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 > Track Changes > Merge Document** on the Menu bar.
- 3) A file selection dialog opens. Select a file you want to merge and click **Open**.
- 4) After the documents merge, the Manage Changes dialog opens, 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 cells outlined in different colors.

Comparing documents

Sometimes reviewers may not record the changes they make. Calc can find the changes by comparing 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 > Track Changes > Compare Document**.
- 3) An open document dialog appears. Select the original document and click **Open**.
- 4) Calc opens the Manage Changes dialog showing the changes identified.

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 in the original document that 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 described earlier.

Saving versions

For auditing and other purposes, you may need to save new versions of a spreadsheet. You can do this by saving a copy of the spreadsheet (under a different name) after each revision, or by using Calc's version feature.

Caution

If you select **File > Save As** on the Menu bar, or press *Ctrl+Shift+S*, for 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) Choose **File > Versions** on the Menu bar. A version management dialog (Figure 12) opens, showing a list of the existing versions saved in this file.

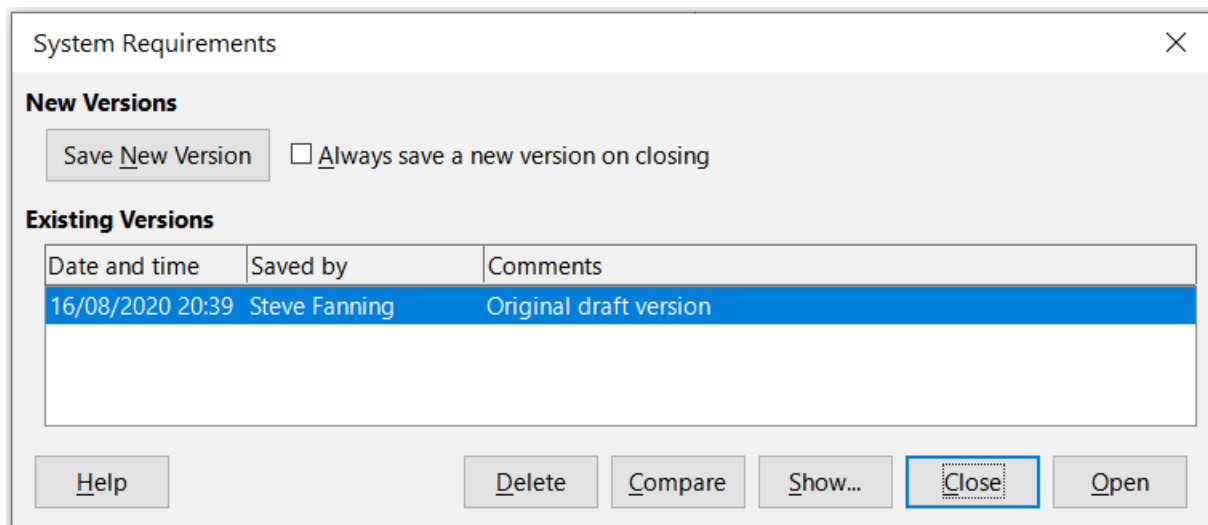


Figure 12: Version management dialog

- 2) Click the **Save New Version** button to save a new version. The Insert Version Comment dialog (Figure 13) opens where you can enter comments about this version.

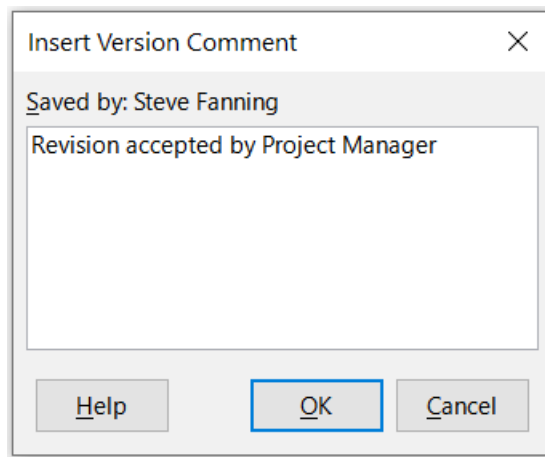


Figure 13: Insert Version Comment dialog

- 3) After you enter your comment and click **OK**, the new version is included in the Existing Versions list (Figure 14).
- 4) Save the file. Both versions are now included in the same file.

From this point you can:

- View an old version – Select the version and click **Open**. A read-only copy of a previous version opens.
- Compare all versions – Clicking **Compare** performs an action similar to merging documents. A Manage Changes dialog opens, showing all of the changes through the different versions.
- Review the version comments – Select a version and click **Show** to display the full comments made by yourself or other reviewers.
- Delete a version – Select a version and click **Delete**. Be careful with this option, when deleting a version, there is no request for confirmation.

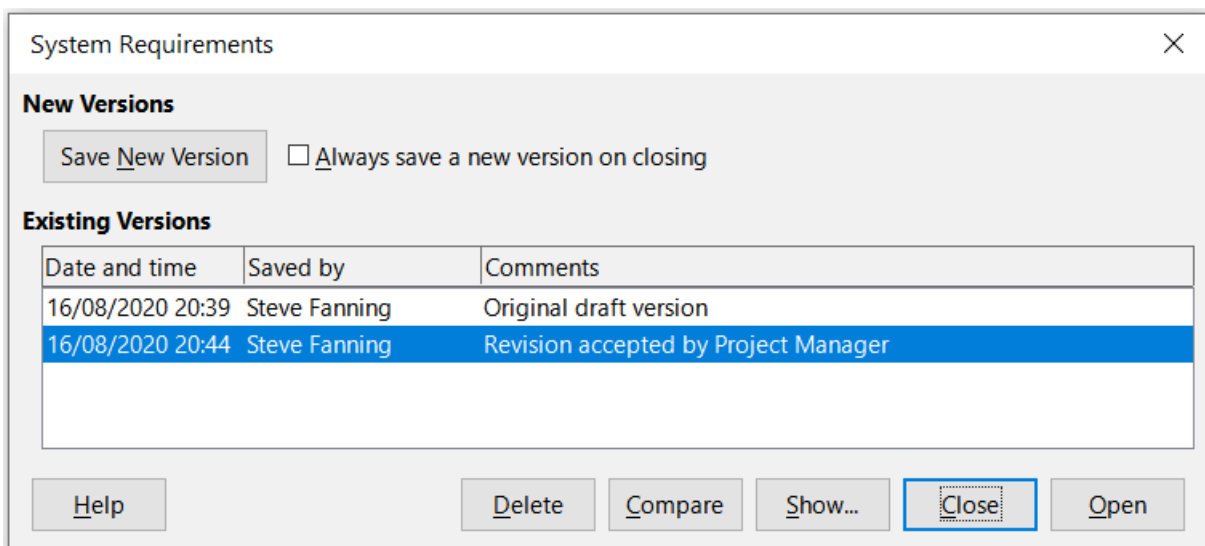


Figure 14: Updated version list