

## Lesson 13-8: Sharing a Workbook and Tracking Changes

**Figure 13-19**

The Editing tab of the Share workbook dialog box.

**Figure 13-20**

Excel Revisions made in the Budget Proposal shared workbook.



**Figure 13-19**

Expenses	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Total
Advertising	\$ 6,000	\$ 5,000	\$ 3,000	\$ 3,000	\$ 17,000
Dues and Sub	\$ 1,500	\$ 1,500			\$ 3,000
Insurance	\$ 2,900	\$ 2,900			\$ 5,800
Office Equipm	\$ 2,500	\$ 500			\$ 3,000
Office Supplie	\$ 500	\$ 500			\$ 1,000
Other Expens	\$ 350	\$ 350			\$ 700
Payroll	\$ 85,000	\$ 85,000	\$ 85,000	\$ 85,000	\$ 340,000

**Figure 13-20**

You can share your Excel workbook files with other people, so that you can work on the data collaboratively. *Sharing* a workbook has several benefits:

- Several people can use the same shared workbook simultaneously.
- Excel keeps track of any changes made to a shared workbook, when they were made, and who made them.
- You can review and accept or reject any changes made to a shared workbook.

This lesson explains how you can share a workbook when you need to collaborate on a project with other people.

### Other Ways to Share a Workbook:

- Select **Tools** → **Share Workbook** from the menu.

1. Make sure the **Budget Proposal** workbook is open, select **Tools** → **Track Changes** → **Highlight Changes** from the menu.

The Highlight Changes dialog box appears, as shown in Figure 13-19.

2. Check the **Track changes while editing** check box.

Checking this check box does two things: (1) it shares the workbook, so other users can use it simultaneously, and (2) it tracks any changes made to the workbook.

3. Click **OK**.

A dialog box may or may not appear (depending on your settings), informing that Excel must save the workbook in order to share it.

**4. Click OK.**

Excel saves and shares the Budget Proposal workbook. Notice that [Shared] appears after the workbook name in Excel's title bar, indicating that you are working on a shared workbook.

That's all there is to sharing a workbook. If you're on a network, multiple users can now open and edit the workbook at the same time (normally, only one person can open and edit the same file at a time). Now that the workbook is shared, you or other users can track any changes made to the workbook. The remainder of this lesson and the next lesson will show how you can track changes in a shared workbook.

You decide to break up the insurance payment of \$5,800 into payments spanning two quarters instead of one. Move on to the next step to make the revisions.

**5. Select cell B7, type 2900, press <Tab> to move to cell C7, type 2900 and press <Enter>.**

Excel highlights the revisions you made in cell B7 and C7 with tiny blue triangles in the upper left-hand corners of the modified cells, as shown in Figure 13-20. You can review your changes later and accept or reject them.

**6. Move the cell pointer over the revised cell B7.**

A note appears by the cell listing the revisions made to it.

**7. Click the Save button on the Standard toolbar to save your changes to the shared workbook.**

You can also make copies of the workbook that you can distribute to reviewers. When you make a copy of a shared workbook, you can later compare, or *merge*, the copied workbook to the original to review any changes that have been made to the copy. Here's how you can create a copy of a shared workbook:

**8. Select File → Save As from the menu.**

The Save As dialog box appears. Save a copy of the shared workbook with a different name.

**NOTE:** When you make copies of a shared workbook, make sure you give the copies a different name than the original.

**9. Type Revised Budget in the File name text box, and click Save.**

The "Budget Proposal" workbook is saved with the new name, "Revised Budget," and the original workbook, "Budget Proposal," closes. Now that you're working with a copy of the original workbook (the Revised Budget file) make some revisions to the workbook. You will get a chance to accept or reject the changes in the next lesson.

**10. Click cell B5, type 6000, press <Tab> to move to cell C5, type 6000, and press <Enter>.**

Remember— now you're working with the copied workbook "Revised Budget" and not the original "Budget Proposal" workbook. Excel highlights your changes in cell C5.

**11. Click cell A10, type Misc Expenses and press <Enter>.**

You're finished making revisions to the Revised Budget workbook, so save your changes and close the workbook.

**12. Save your changes and then close the Revised Budget workbook.****Change Indicator****Quick Reference**

To Share a Workbook:

1. Select **Tools** → **Track Changes** → **Highlight Changes** from the menu.
2. Check the **Track changes while editing** check box.
3. Make sure you save the workbook where it is accessible to other users (i.e. a shared folder on a network drive).

To View Changes Made to a Cell:

- Position the mouse pointer over the marked changed cell and wait a few seconds.

To Make a Copy of a Shared Workbook:

- Create a copy of the shared workbook by selecting **File** → **Save As** and saving it with a different name. Then you can distribute these copies to other users and later compare or "merge" them with the original to review any changes made.