Calc

LibreOffice

REVIEWING SPREADSHEETS

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Recording changes

You can use several methods to record changes that you or others make to a document:

You can use change marks to show added material, deleted material, and changes to formatting. Later, you or another person can review the document and accept or reject each change. Not available in shared files.

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 303.

You can save versions that are stored as part of the original file. See page 304.

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

Preparing a document for review (optional)

This feature is not available in shared documents. When you send a document 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 document so that any user must enter the correct password in order to turn off protection and accept or reject changes. It is not necessary to password protect the document while preparing it for review.

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. You can also use **File > Properties > Security** and select **Record changes**.

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(Optional) Click **Edit > Changes > Protect Records**. On the Enter Password dialog, type a password (twice) and click **OK**. You can also use **File > Properties > Security** and click the **Protect** button to open the Enter Password dialog.

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 file name is displayed in the title bar. To set the title of the spreadsheet, select **File > Properties > Description**.
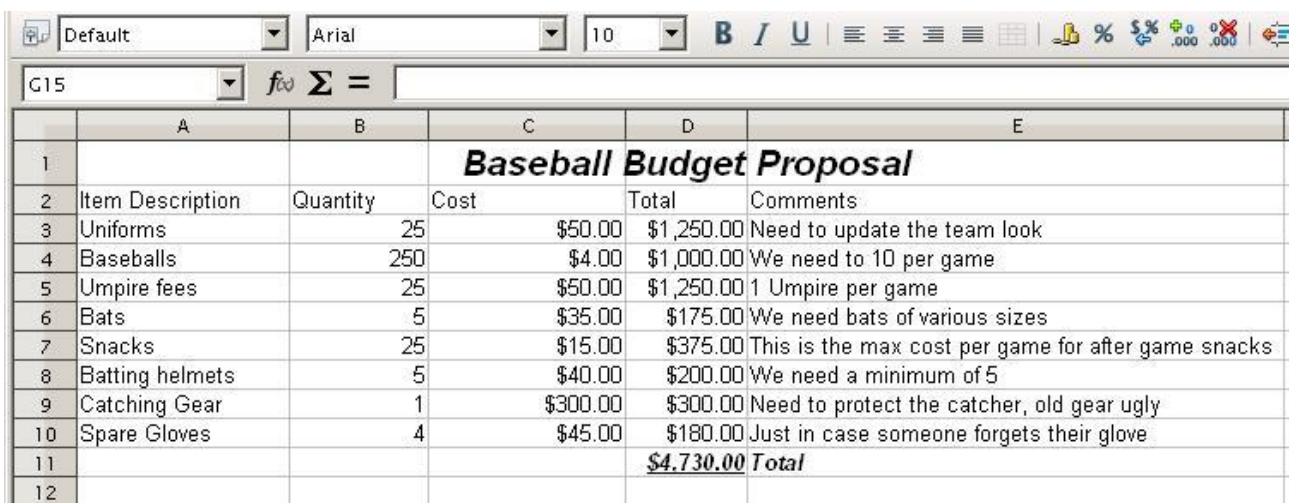
Recording changes (tutorial)

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 will not see the changes you made. You decide to use Calc with the record changes feature turned on, so that the coach can easily see the change you have made.

Figure 271 shows the budget spreadsheet your coach submitted.

Figure 271: Baseball budget spreadsheet

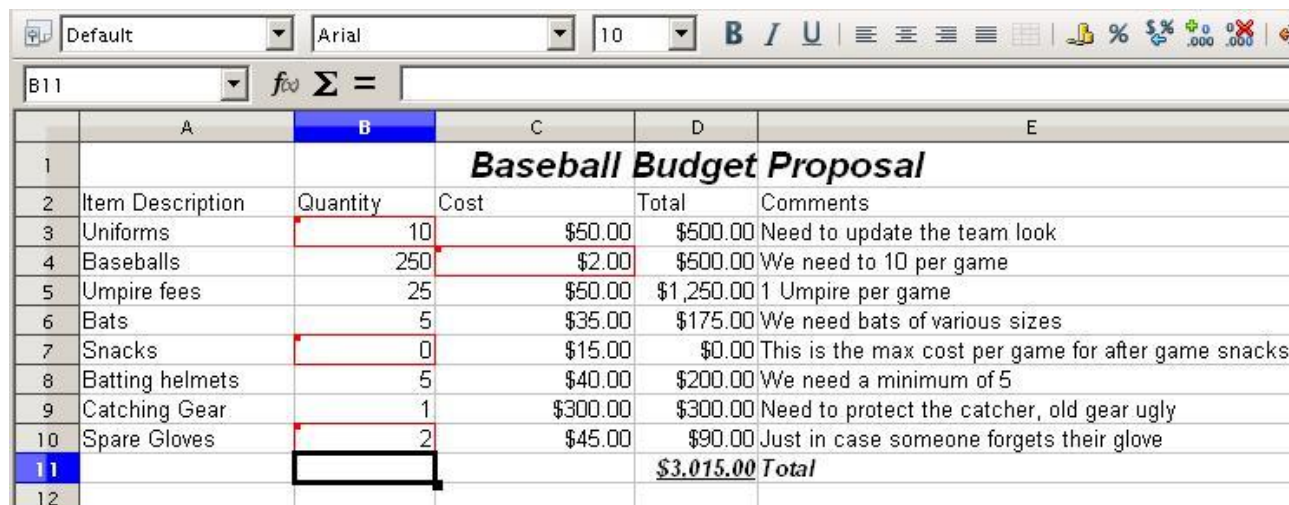Looking over the figures, you see a few places where money could be saved:

   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 recording changes:

   Open the Budget Spreadsheet.

   Select **Edit > Changes > Record** from the menu bar.

   Begin editing the document.

A colored border, with a dot in the upper left-hand corner, appears around a cell where changes were made (Figure 272). Other reviewers then quickly know which cells were edited. A deleted column or row is marked by a heavy colored bar.

Figure 272: Edited document with red border on changed cells

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

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

When you finish editing the document, you can send it to your coach.

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 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.

To add a comment to a change:

    Make the change to the spreadsheet.
    Select the cell with the change.
    Choose **Edit > Changes > Comments.** The dialog shown in Figure 273 appears.

Figure 273: Insert Comment dialog

Type your comment and click **OK**. The automatically-added comment provided by Calc cannot be edited.

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 274.
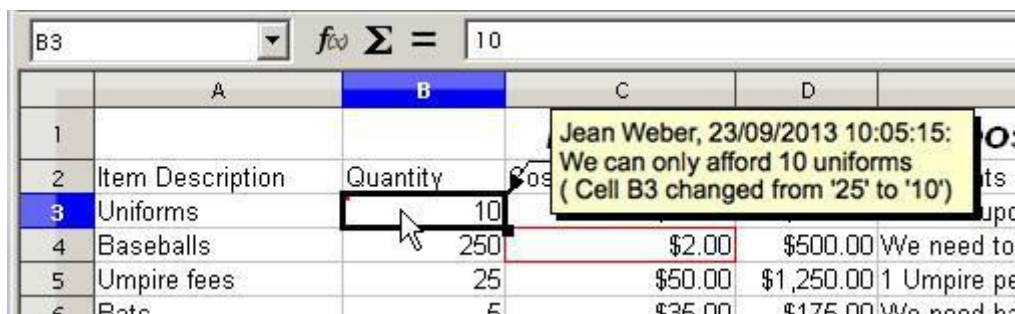

Figure 274: Comment added to cell B3

The comment also appears in the dialog when you are accepting and rejecting changes, as shown in the first line of Figure 279 on page 302.

Editing change comments

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

Select **Edit > Changes > Comments.**

Edit the comment and click **OK.**

Adding other comments

Calc provides another type of comments (formerly called "notes"), which authors and reviewers often use to exchange ideas, ask for suggestions, or brainstorm in the document.

To add a comment:

Select the cell that the comment applies to.

Select **Insert > Comment** or right-click and select **Insert Comment**. (The latter method does not work if the automatic spelling checker is active and the cell contains a misspelled word.) The box shown in Figure 275 appears.
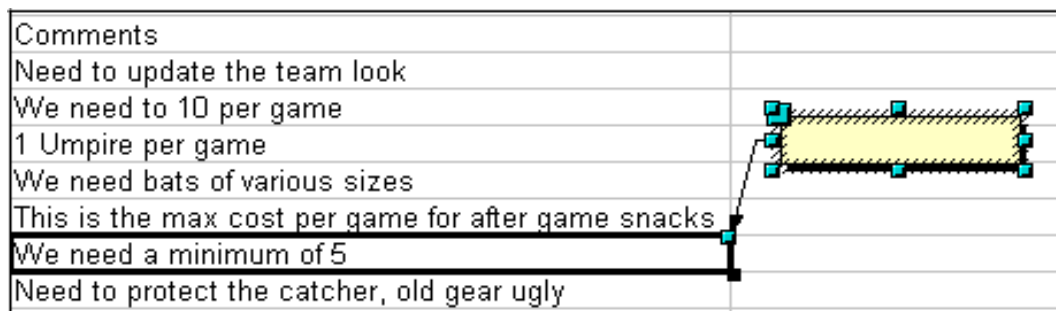

Figure 275: Inserting a comment

3) Type the text of 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 276. It does not have a colored border, unless the cell was also changed.
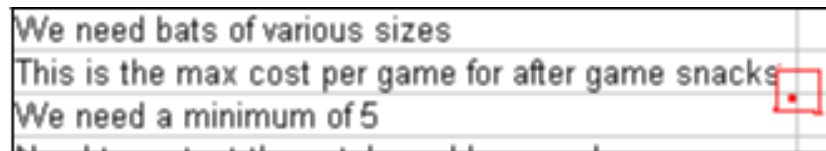
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Figure 276: Colored dot in cell containing a comment

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

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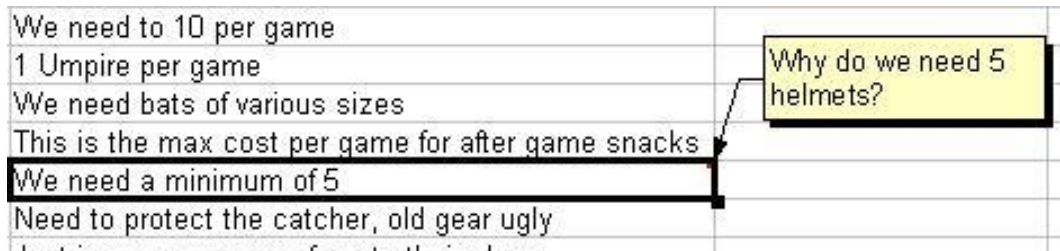

Figure 277: Viewing a comment

Editing comments

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

> Right-click on the cell containing the comment marker and choose **Show comment** from the context menu.
> Select the comment, then double-click on it. The cursor changes to the usual blinking text-entry cursor, and the Formatting toolbar changes to show text attributes.
> When done, click outside the comment to deselect it. To hide the comment again, right-click on the cell and deselect **Show Comment** on the context menu.

Formatting comments

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

> Right-click on the cell containing the comment marker, and choose **Show comment** from the context menu.
> 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 in Calc, for more information.
> You can also right-click on the comment 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.
> When done, click outside the comment to deselect it. To hide the comment again, right-click on the cell and deselect **Show Comment** on the context menu.

Finding comments using the Navigator

The small comment 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 comments are in the spreadsheet, the Navigator shows a mark (usually a + or an arrow) next to the word Comments. Click on this mark to display a

list of comments. Double-click on the comment 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

You have some control over what changes you see when reviewing a document. Select **Edit > Changes > Show** from the Menu bar. The Show Changes dialog Figure 278) opens.
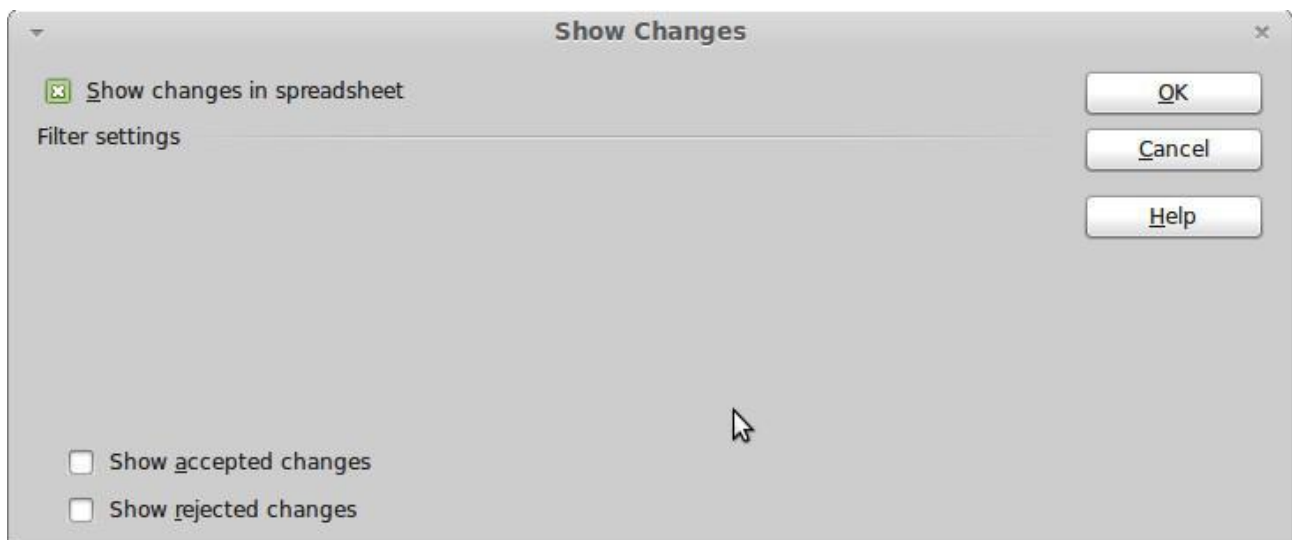

Figure 278: Show changes dialog

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:

Open the edited document.

Select **Edit > Changes > Accept or Reject**. The dialog shown in Figure 279 appears.

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.
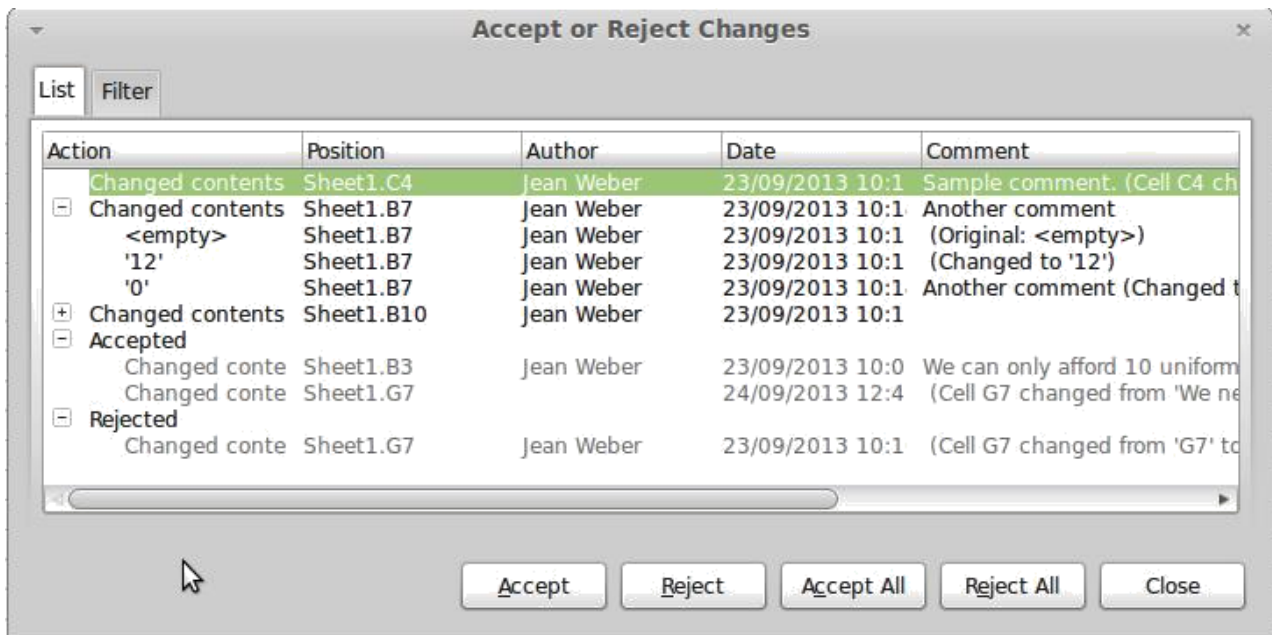

Figure 279: Accept or Reject changes dialog

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 279.

If a change has been superceded by later change (by either the same person or another person), the changes are hierarchically arranged with a plus sign 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.

On the Filter tab of this dialog (Figure 280), 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.
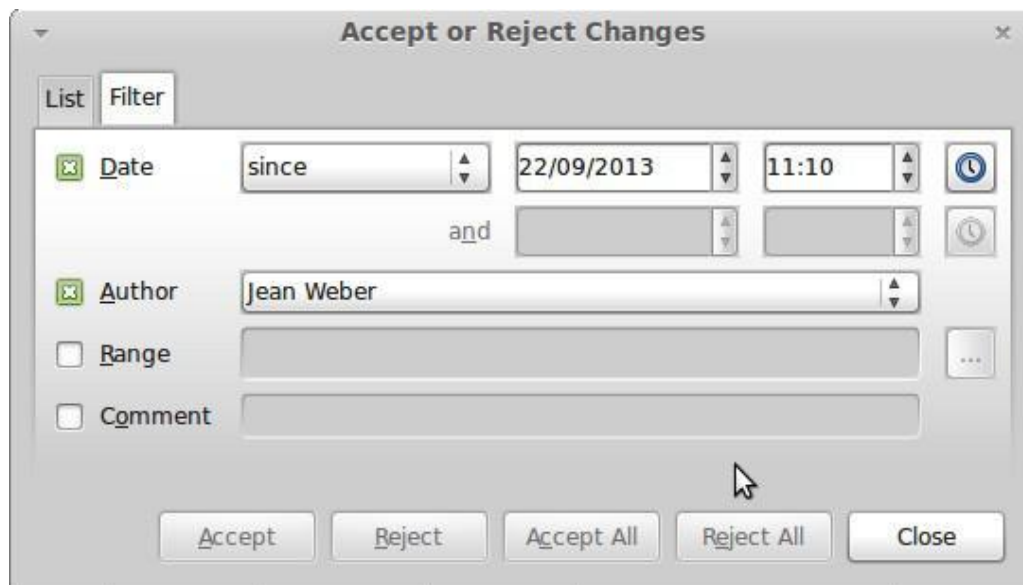

Figure 280: Filters set here affect the list of changes shown on the List tab