

# Document Collaboration in Word and Excel

Gini Courter and Annette Marquis

Word was the first application in the Office suite designed for collaboration. As early as Office 4.2/4.3, Microsoft Word included a tracking feature. In the versions of Office that followed, tracking and collaboration features were enhanced in Word and added to Excel.

## Tracking Changes in Word

With tracking enabled, each author (or editor) is assigned a unique color. The author's deletions and insertions are noted in the document until the changes are accepted or rejected:

For more information on smart tags, see [Chapter 4, "Using Names and External References,"](#) and [Chapter 17, "Importing and Exporting from Excel 2002,"](#) and [Appendix D, "Creating Simple Smart Tags for Excel 2002 Using SmartTags."](#)

### Turning on Tracking

To turn on document tracking in Word, choose **Tools** > **Track Changes** or double click the TRK indicator in the status bar or right click the TRK indicator to open the shortcut menu and choose **Track Changes** from the shortcut menu.

In Word 2002, the Reviewing toolbar automatically opens when you enable tracking, and in Page Layout view, changes are described in the margin.

### Setting Tracking Options

Right click the TRK indicator on the status bar and choose **Options** from the shortcut menu to set tracking options. If you assign a specific color for tracking, the color is applied to the editing session, not to the author. (In other words, don't change colors if there are multiple editors working on a document.)

### Accepting or Rejecting Changes

Right click a change and choose **Accept Insertion** or **Reject Insertion** from the shortcut menu to accept or reject an individual change.

To accept or reject changes in bulk in Word 2002, turn on the Reviewing toolbar (**View** > **Toolbars** > **Reviewing**). Use the **Previous** and **Next** buttons to move to the previous or next change. Use the **Accept Change** or **Reject Change** button to accept or reject individual changes. Click the drop down arrow on either button to accept or reject all changes to document.

To accept or reject changes in bulk in Word 2000, right click the status bar TRK indicator and choose **Accept or Reject Changes** from the shortcut menu. In the **Accept or Reject Changes** dialog box use the **Find** buttons to move to the previous or next change. Use the **Accept** and **Reject** buttons to accept or reject individual changes, or the **Accept All** and **Reject All** buttons to accept or reject all changes.

## Versioning in Word


Versioning provides another way to record changes made to a document. Unlike saving the file with a different name or creating a backup, a version is saved within the same document so you can review, print, and manage earlier versions of a document from one file.

## Saving as a Version in Word

1. Choose File ➤ Versions to open the Versions In... dialog box
2. Click the Save Now button to open the Save Version dialog box
3. Enter a description of the version
4. Click OK

## Switching Between Versions

1. Choose File ➤ Versions to open the Versions In...dialog box
2. Select a version and click Open.

 In Word 2002, a Versions indicator appears in the status bar for versioned documents. Double click the indicator to open the Versions In... dialog box.

## Deleting Versions

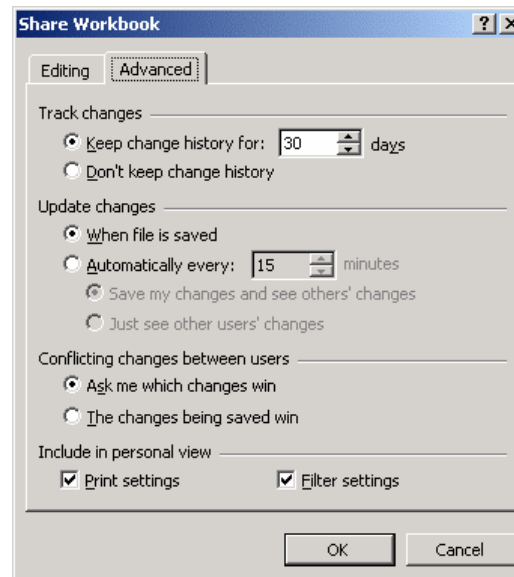
Lots of old versions lying around in a document will slow performance. To delete a version, open the Versions In dialog box, select the version, and click Delete.

## Tracking Changes in Excel

With Excel 2000 and 2002 multiple users can modify a workbook at the same time, and each user's changes can be color coded and tracked as they are in Word. To track changes, the workbook must be shared and stored on a drive that other users have permissions to access.

### Sharing Workbooks

1. Choose Tools ➤ Share Workbook from the menu to open the Share Workbook dialog box
2. On the Editing tab, enable Allow Changes
3. Set tracking options on the Advanced tab
4. Click OK to enable tracking.
5. Save the workbook when prompted



### Highlighting Workbook Changes

1. Choose Tools ➤ Track Changes ➤ Highlight Changes to open the Highlight Changes dialog box
2. Enable the Track Changes While Editing check box; this shares the workbook if it is not already shared
3. Click OK

### Viewing Workbook Changes

Excel marks changed cells with a cell indicator in the upper left corner. Hover over a cell to display the cell's change history. To filter the history displayed in the workbook, choose Tools ➤ Track Changes ➤ Highlight Changes to open the Highlight Changes dialog box. Set options and click OK. To see a summary of the changes, choose Tools ➤ Track Changes ➤ Highlight Changes. Enable the List Changes on a New Sheet check box to have Excel create a history sheet in the workbook.

### Resolving Conflicts

When changes you are saving conflict with changes saved by another user, Excel prompts you to resolve the conflict. Using the Resolve Conflict dialog box, you can review each change individually and accept your change or others' changes or you can accept/reject changes in bulk.

## Accepting or Rejecting Changes

You can review a workbook and accept or reject changes in bulk or individually as you do in Microsoft Word. To begin reviewing, choose Tools > Track Changes > Accept or Reject Changes. A message box notifies you that the action will save the workbook. Click OK to open the Select Changes to Accept or Reject dialog box.

Some Excel features aren't available in shared workbooks. While a workbook is shared, you can't: delete worksheets; use conditional formatting or validation; insert or delete objects including charts; use subtotals and outlining.

## Inserting Comments in Word and Excel

Comments appear on screen but are only printed with the document if you change the default print settings. In Word or Excel, the option to print comments is set in the Print dialog box.



### Word's Reviewing Toolbar

The Reviewing toolbar automatically opens when you insert a comment in Word 2002; in Word 2000, right click any toolbar and choose Reviewing to display the Reviewing toolbar.

### Comments in Word 2000

To insert a comment, position the insertion point and choose Insert > Comment from the menu. The word just before the comment is highlighted. Comments are entered in a comment pane at the bottom of the application window. Click Close to close the pane when you're finished entering your comment. To view a comment, hover over the highlighted word.

### Comments in Word 2002[g3]

To insert a comment, position the insertion point and choose Insert > Comment from the menu. The word just before the comment is enclosed in non-printing brackets, and the comment is displayed in a red bubble in the right margin.

**Comment:** Not in Word 2000



### Comments in Excel

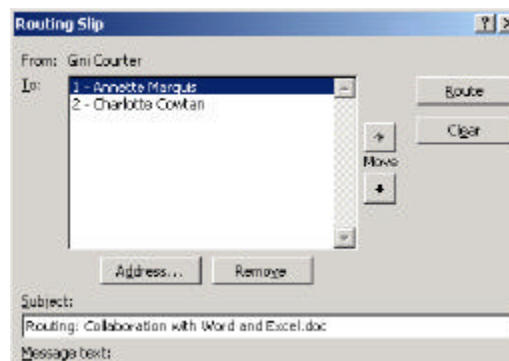
Use the Insert > Comment command or right click a cell and choose Insert Comment from the shortcut menu to insert a comment. Click in the worksheet when you are finished entering the comment. You can move or resize the comment before you click in the worksheet to close the comment, or while editing the comment. To edit a comment, right click and choose Edit Comment. To view a comment, hover over the cell.



To display all worksheet comments or hide the indicators, choose Tools > Options to open the Options dialog box and set the Comments option on the View tab.

## Sending and Routing Documents in Word and Excel

There are two ways to email your work to others in Office 2000, and three ways in Office XP. In Office 2000, you can send the document as the body of a message or as



## Sending a Document

Choose File ➤ Send To, and choose either Mail Recipient as Attachment or Mail Recipient.

## Routing a Document

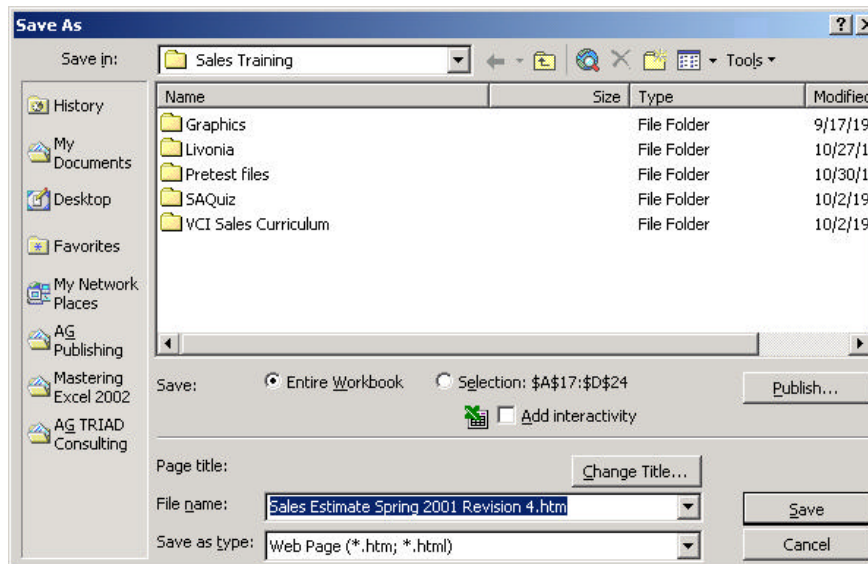
1. Choose File ➤ Send To ➤ Routing Recipient to open the Routing Slip dialog box
2. Click the Address button to add recipients to the list from your address books. Use the Move Up and Move Down buttons to rearrange the recipient addresses.
3. Verify or change the Subject and enter additional message text.
4. Choose from the Route To Recipients options: One After Another or All At Once.
5. Enable Return When Done to have the document returned to you when the last recipient has reviewed it.
6. Enable Track Status to automatically turn on tracking.
7. Click Route to begin routing the document. Click Add Slip if you're not ready to route the document yet, but want to save the routing slip. To route the document later, choose File ➤ Send To ➤ Next Routing Recipient.

## Using Office Web Components in Excel 2000/2002

The Office Web Components (OWCs) are ActiveX components for use in web pages. There are three components: PivotTable, Spreadsheet, and Chart. The components are lean versions of an Excel spreadsheet, a pivot table, and a chart. The OWCs can be used to create pages, or added to existing pages created with other applications like FrontPage or Access. And here's the magic: the Office Web Components make web pages interactive.

## Creating a Web Page with Interactivity

1. Select the spreadsheet range, chart, or pivot table you wish to publish
2. Choose File ➤ Save As Web Page to open the Save As dialog box
3. Select a location and enter a name for the HTML file
4. Click the Change Title button to change the text that will appear in the browser title bar
5. In the Save options, choose the option other than Entire Workbook.
6. Enable the Add Interactivity check box.
7. Click the Publish button to open the Publish As Web Page dialog box



When you publish an entire workbook, the result is a static page.

- use in the Add Interactivity With drop down list.
10. Enable the Open Published Web Page in Browser check box to preview the page after it is created.
  11. In Excel 2002 only, you can have the page AutoRepublish each time the workbook is saved by enabling the AutoRepublish check box.
  12. Click Publish to create the page.

For users to view the page with interactivity, they must have two things: Internet Explorer 4.01 or better, and a license on their computer for Office 2000 or Office 2002. This makes pages with interactivity ideal for intranets (where you can predict the user's applications) but not for the Internet.

