*Calc Guide*

# *Chapter 11*
# *Editing, Changing, and Reviewing:*

*Notes and revision control*

*OpenOffice.org*

# Copyright

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# Feedback

# Acknowledgments

# Publication date and software version

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# Making changes

The most efficient way to share a document among multiple reviewers is for all reviewers to record the changes they make to the document. If reviewers record changes, then the author can step through the changes one at a time and accept or reject them. During this process, reviewers can leave notes either in general in the document or attached to a specific change.
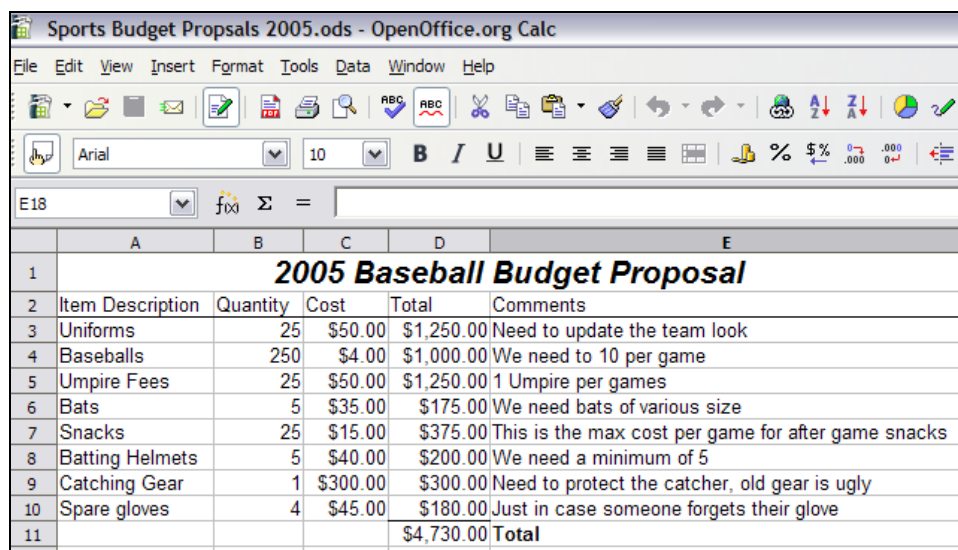
## Recording changes

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 1 shows the budget spreadsheet your coach submitted.



*Figure 1: 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 broken 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.

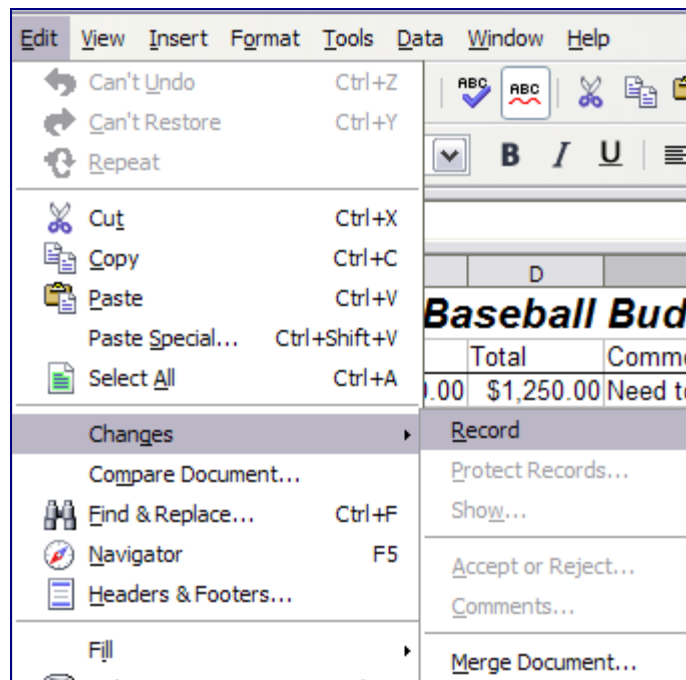2) Select **Edit > Changes > Record** (Figure 2) from the menu bar.



*Figure 2: Activating change recording*

3) Begin editing the document.

Red borders appear around the cells where changes were made (Figure 3). Other reviewers then quickly know which cells were edited.

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

*Figure 3: Edited document with red border on changed cells*

Once 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 add comments or notes to accomplish this.

# Adding comments and notes

You can share your insight in two ways: by adding comments to the changes you made or by adding a general note to the spreadsheet. Functionally, these methods both accomplish the same purpose in Calc (there is a bigger difference between the two in Writer), but they have different uses.

In short, comments are only associated with a change you made and notes can be added at any time, with or without an accompanying change.

## Adding comments

Reviewers and authors use comments to communicate with each other why they made the changes. This can be useful since often the author and the reviewers are not in the same physical location and other forms of communication may be inconvenient. To add a comment to a change:

1) Make the change to the spreadsheet.

2) Select the cell with the change that you want to add a comment to.

3) Select **Edit > Changes > Comments.** The dialog shown in Figure 4 appears.

4) Type your comment and click **OK.**
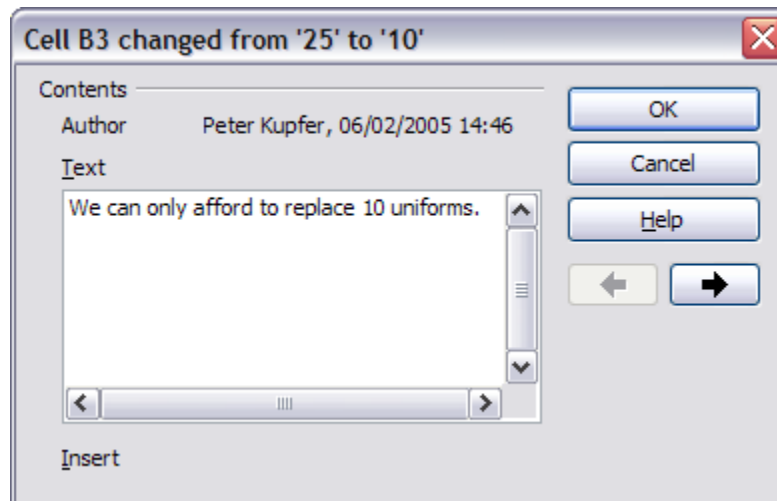
*Figure 4: Comment dialog box*

| 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 box, and add comments to each change. The menu bar for the comment dialog box tells you the cell and the change you are commenting on. |
| --- | --- |

Once 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 5.
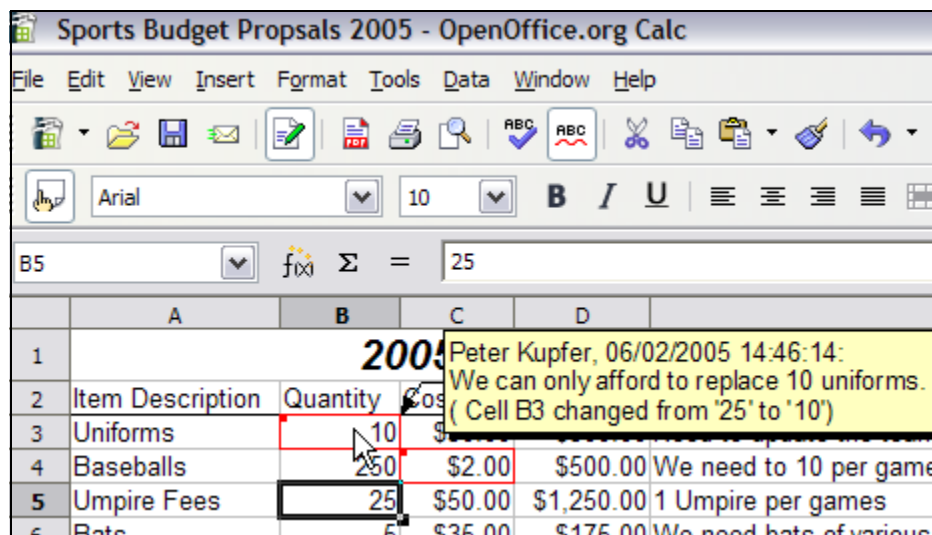


*Figure 5: Comment added to cell B3*

The comment you typed also appears in the dialog box when you are accepting and rejecting changes, as shown in the first line of Figure 10 on page 7.

## Adding a note

Notes are similar to comments, except that they do not need to be associated with a change. 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 6 appears.
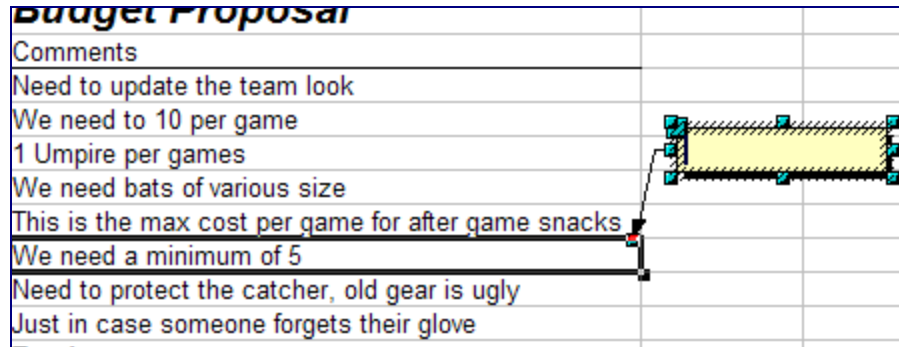


*Figure 6: Insert note box*

3) Type the text of your note in the box.

4) Click outside the box to close it.

Now the cell you added the comment to has a colored dot in the corner, as shown in Figure 7.
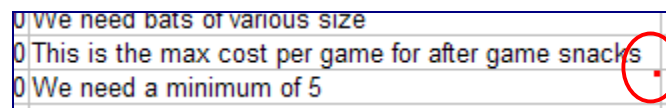


*Figure 7: Colored dot in noted cell*

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

To view the note you just added, follow the same procedure as for viewing a comment. Hover the mouse pointer over the cell that has a note; the note appears, as shown in Figure 8.
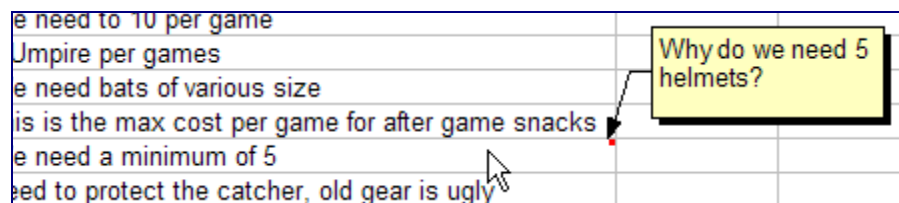


*Figure 8: View note*

# 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 9 opens.
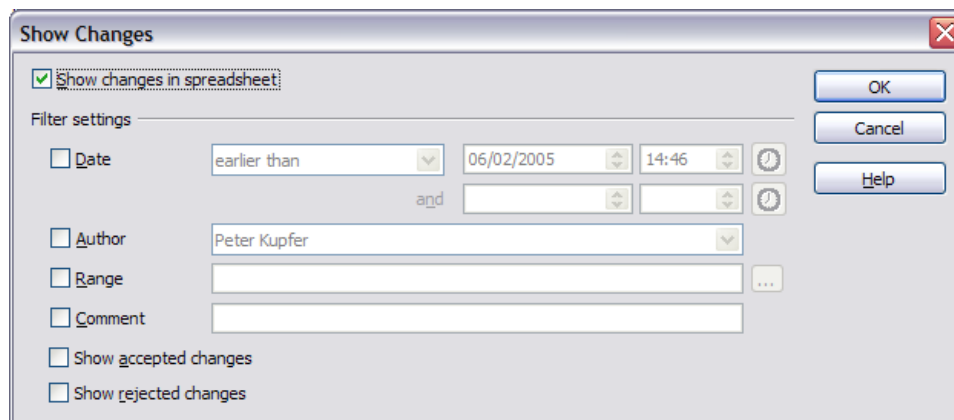


*Figure 9: Show changes dialog*

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 10. Click the *Filter* tab to get a set of options similar to those shown in Figure 9.

## 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 10 appears.



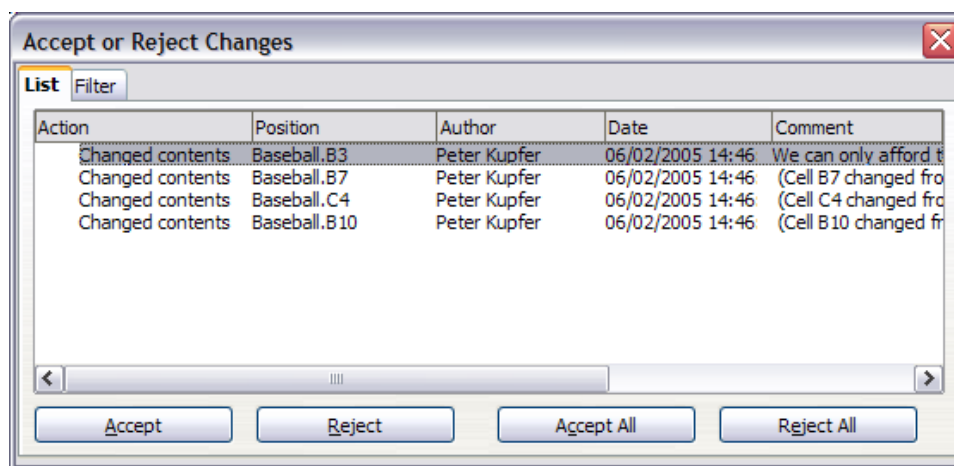*Figure 10: Accept or Reject Changes dialog*

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 always 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 10.

# 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** (Figure 2).

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 11, showing changes by more than one reviewer. If you want to merge more documents, close the dialog and then repeat steps 2 and 3.
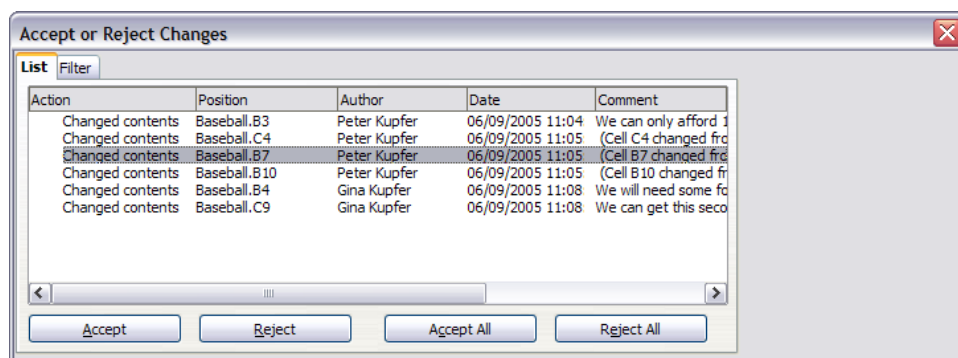


*Figure 11: Accept or reject for merged documents*

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 12. In this example, all of the changes from Peter are blue and the changes from Gina are red.

| A | B | C | D | E |
|---|---|---|---|---|
| **2005 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 games |
| Bats | 5 | $35.00 | $175.00 | We need bats of various size |
| 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 is ugly |
| Spare gloves | 2 | $45.00 | $90.00 | Just in case someone forgets their glove |
| | | | $2,940.00 | Total |

*Figure 12: 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** (Figure 2).

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.

# 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 after each revision, or you could use Calc's version feature. To use the version management in Calc:

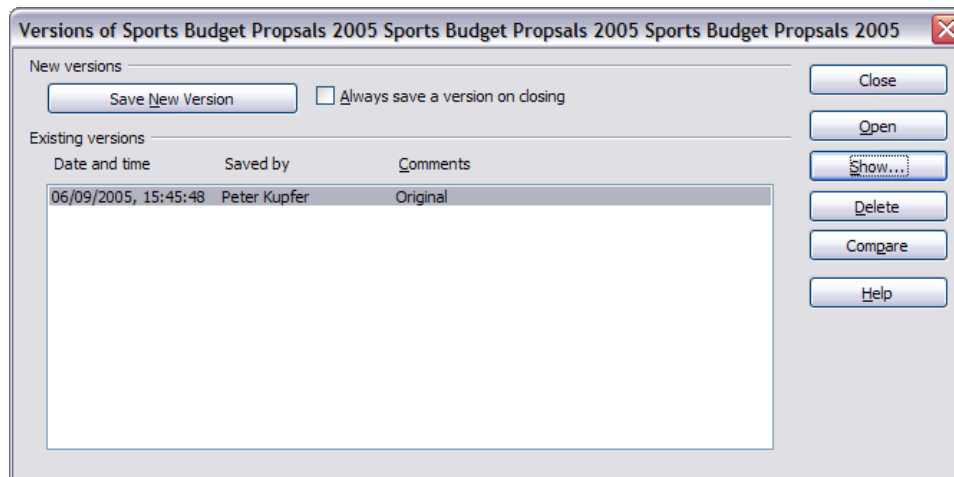1) Select **File > Versions**. The *Versions dialog* opens as in Figure 13.



*Figure 13: Version management dialog window*

2) Click the **Save New Version** button to save a new version.

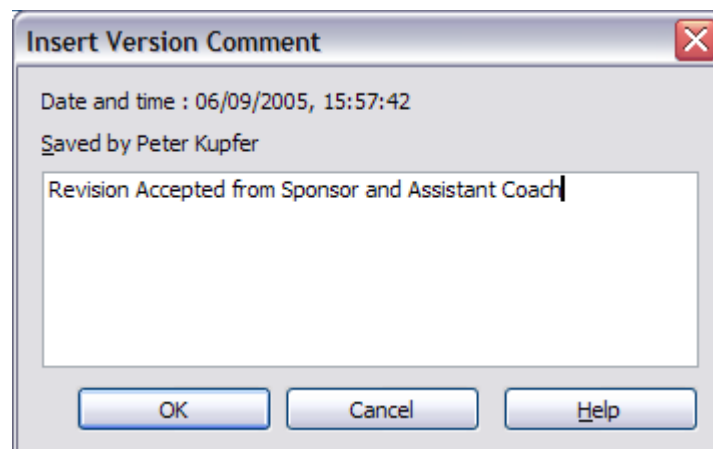3) A dialog opens where you can enter comments about this version, as shown in Figure 14.



*Figure 14: Version comment dialog*

4) After you enter your comment and click **OK**, the version is included in the version list as shown in Figure 15.
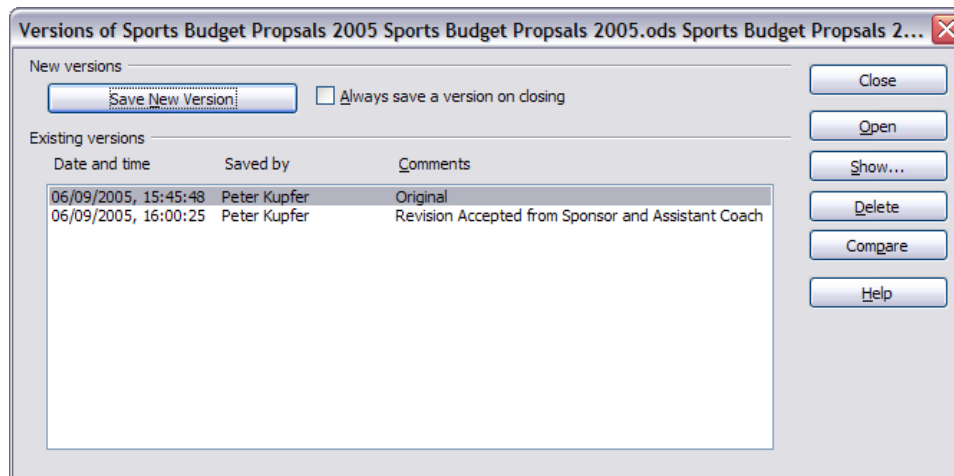
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*Figure 15: Updated version list*

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 there were actually two spreadsheets saved together. |
|---|---|

| **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. |
|---|---|

## A note about file names and titles

When sharing documents 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. In Calc, the filename of the spreadsheet is displayed in the title bar. You can set the title of the spreadsheet in the Properties dialog. To set the title, select **File > Properties > Description**.