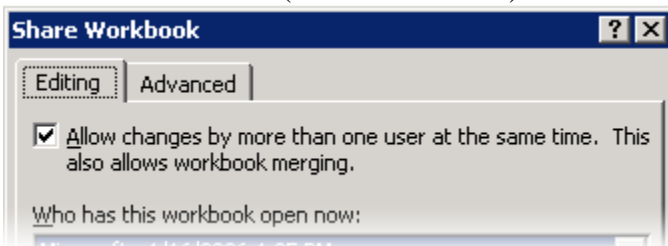


Microsoft Excel 2007 Sharing a Workbook

Allowing multiple users to edit a workbook simultaneously

If you have a workbook in which you want to allow more than one other person to add or modify data simultaneously, you can set up and save the workbook as "shared" and then make it available on a network share (not a Web server).



Use the Share Workbook feature when:

- You want multiple users to be able to edit the data in one workbook simultaneously, and you are comfortable with the original data in the workbook being modified, including edits, additions, and deletions.

- You have a network share available on which to store the workbook and to which users have access.

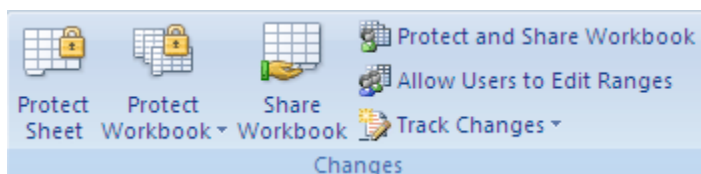
Note More than one user cannot simultaneously make changes to a shared workbook that is stored on a Windows SharePoint Services 3.0 site. If you want to store your workbook on a Windows SharePoint Services 3.0 site, you should do so only after the collaboration effort through sharing is complete.

- You want to keep a record of the changes that are made in the workbook.

- You do not expect to change the following features, which cannot be modified after a workbook is shared: merged cells, conditional formats, data validation, charts, pictures, objects (including drawing objects), hyperlinks, scenarios, outlines, subtotals, data tables, PivotTable reports, workbook and worksheet protection, and macros.

Important Saving an Office Excel 2007 shared workbook to an earlier version file format unshares the workbook, and the revision history that documents the conflicts and resolutions is lost. If you need to save the workbook to an earlier version format, you may want to save a copy of the revision history first.

As the owner of the workbook, you can prepare it to be shared by entering and formatting the data that needs to be present. When you are finished, click **Share Workbook** in the **Changes** group on the **Review** tab, select your options, and then save the workbook on a network share (not a Web server) that is available to the intended users. Alternatively, you can click **Protect and Share Workbook** in the **Changes** group on the **Review** tab to prevent other users from turning off Change Tracking in the workbook.



Each time that you save the shared workbook, you are prompted with the changes that other users have saved since the last time that you saved the shared workbook. If you want to keep the shared workbook open to monitor progress, Excel can update you with the changes automatically, at timed intervals that you specify, with or without saving the workbook yourself. When you save changes to a shared workbook, another person who is editing the workbook might have saved changes to the same cells. In this case, the changes conflict, and you are prompted with a conflict resolution dialog box so that you can choose which changes to keep.

Share a workbook

1. Create a new workbook and enter any data that you want to provide, or open an existing workbook that you want to make available for multiuser editing.

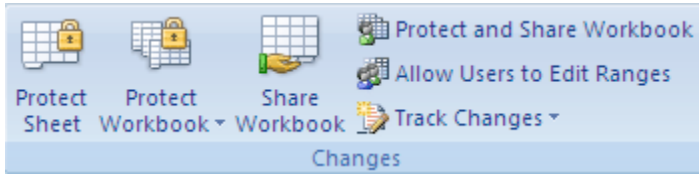
Note Not all features are supported in a shared workbook.


Things you can't do with a shared workbook

There are tasks that you cannot do with a shared workbook. You cannot:

- _ Delete worksheets.
- _ Merge cells. You can view cells that were merged before you shared the workbook.
- _ Define or apply conditional formats. However, you can see the effects of conditional formats applied before you shared the workbook.
- _ Set up or change data validation restrictions and messages. However, you can see the effects of restrictions and messages that were set up before you shared the workbook.
- _ Insert or delete blocks of cells. You can insert or delete entire rows and columns.
- _ Insert or change charts, pictures, objects, or hyperlinks.
- _ Use the drawing tools.
- _ Assign a password to protect individual worksheets or the entire workbook. Protection that you applied before sharing the workbook remains in effect after you share the workbook.
- _ Change or remove passwords. Passwords that you assigned before sharing the workbook remain in effect after you share the workbook.
- _ Save, view, or make changes to scenarios.
- _ Group or outline data.
- _ Insert automatic subtotals.
- _ Create data tables.
- _ Create PivotTables or change the layout of existing PivotTables.
- _ Make changes to dialog boxes or menus.
- _ Write, change, view, record, or assign macros. However, you can record operations in a shared workbook into a macro stored in another workbook that isn't shared. In a shared workbook, you can run macros that were created before you shared the workbook; although if you run a macro that includes an unavailable operation, the macro stops running when it reaches the unavailable operation.

2. On the **Review** tab, in the **Changes** group, click **Share Workbook**.




3. On the **Editing** tab, select the **Allow changes by more than one user at the same time. This also allows workbook merging** check box.
4. On the **Advanced** tab, select the options that you want to use for tracking and updating changes, and then click **OK**.
5. Do one of the following:
 - If this is a new workbook, type a name in the **File name** box.
 - If this is an existing workbook, click **OK** to save the workbook, click **Microsoft Office Button** , and then click **Save As**.
6. **On a computer that is running Windows Vista**
 - In the **Address bar**, select a network location that is accessible to the intended users, and then click **Save**.

On a computer that is running Microsoft Windows XP

- In the **Save in** box, select a network location that is accessible to the intended users, and then click **Save**.

Note You should use a shared network folder, not a Web server.


7. If the workbook contains links to other workbooks or documents, verify the links and update any links that are broken, and then click **Save**  on the **Quick Access Toolbar**, or press CTRL+S.




Sharing Workbooks

Edit a shared workbook

After you open a shared workbook, you can enter and change data as you do in a regular workbook.

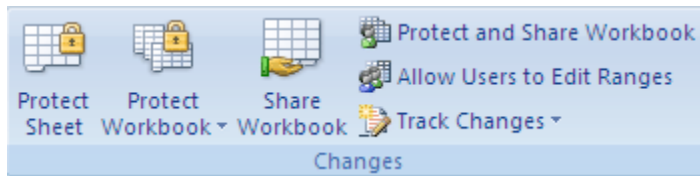
1. Open the shared workbook.
 - a. Click **Microsoft Office Button** , and then click **Open**.
 - b. In the **Look in** box, locate the network location where the shared workbook is stored, and then click the shared workbook.
 - c. Click **Open**.


Tip You can also go to the network location where the shared workbook is stored and double-click the shared workbook to open it.

2. Click the **Microsoft Office Button**  , and then click **Excel Options**.
3. In the **Popular** category, under **Personalize your copy of Office**, in the **User Name** box, enter the user name that you want to use to identify your work in the shared workbook, and then click **OK**.
4. Enter and edit data on the worksheets as usual.

Note You won't be able to add or change the following: merged cells, conditional formats, data validation, charts, pictures, objects including drawing objects, hyperlinks, scenarios, outlines, subtotals, data tables, PivotTable reports, workbook and worksheet protection, and macros.

- a. On the **Review** tab, in the **Changes** group, click **Share Workbook**.



- b. On the **Advanced** tab, under **Include in personal view**, clear the **Print settings** or **Filter settings** check box, and then click **OK**.
5. To save your changes to the workbook and see the changes that other users have saved since your last save, click **Save**  on the **Quick Access Toolbar**, or press CTRL+S.



If the **Resolve Conflicts** dialog box appears, resolve the conflicts.

Notes

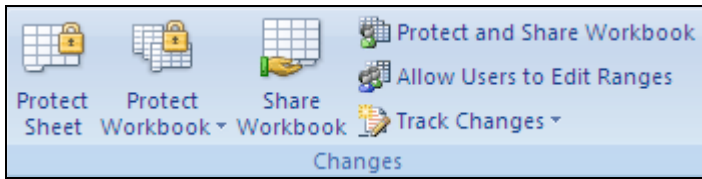
You can see who else has the workbook open on the **Editing** tab of the **Share Workbook** dialog box (**Review** tab, **Changes** group, **Share Workbook** button).




You can choose to get automatic updates of the other users' changes periodically, with or without saving, under **Update changes** on the **Advanced** tab of the **Shared Workbook** dialog box.

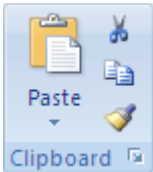
Stop sharing a workbook

Before you stop sharing the workbook, make sure that all other users have completed their work. Any unsaved changes will be lost. Because the change history will also be deleted, you may want to start by printing the History worksheet or by copying it to another workbook.

1. To keep a copy of the change history information, do the following:
 - a. On the **Review** tab, in the **Changes** group, click **Track Changes**, and then click **Highlight Changes**.



- b. In the **When** list, select **All**.
- c. Clear the **Who** and **Where** check boxes.
- d. Select the **List changes on a new sheet** check box, and then click **OK**.
- e. Do one or both of the following:
 - To print the History worksheet, click **Microsoft Office Button** , and then click **Print**.
 - To copy the history to another workbook, select the cells that you want to copy, click **Copy**  on the **Home** tab in the **Clipboard** group, switch to another workbook, click where you want to place the copied data, and then click **Paste**  on the **Home** tab in the **Clipboard** group.



- f. **Note** You may also want to save or print the current version of the workbook, because this history data might not apply to later versions of the workbook. For example, cell locations, including row numbers, in the copied history may no longer be current.
2. In the shared workbook, on the **Review** tab, in the **Changes** group, click **Share Workbook**.
3. On the **Editing** tab, make sure that you are the only person listed in the **Who has this workbook open now** list.
4. Clear the **Allow changes by more than one user at the same time. This also allows workbook merging** check box.

Note If this check box is not available, you must first unprotect the workbook. To remove shared workbook protection, do the following:

- a. Click **OK** to close the **Share Workbook** dialog box.
- b. On the **Review** tab, in the **Changes** group, click **Unprotect Shared Workbook**.
- c. If you are prompted, enter the password (password: A way to restrict access to a workbook, worksheet, or part of a worksheet. Excel passwords can be up to 255 letters, numbers, spaces, and symbols. You must type uppercase and lowercase letters correctly when you set and enter passwords.), and then click **OK**.
- d. On the **Review** tab, in the **Changes** group, click **Share Workbook**.
- e. On the **Editing** tab, clear the **Allow changes by more than one user at the same time. This also allows workbook merging** check box.

5. When you are prompted about the effects on other users, click **Yes**.