MICROSOFT EXCEL

X

Track Changes & Comments

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3 Introduction

Let's say someone asked you to proofread or collaborate on a workbook. If you had a printed copy, you might use a red pen to edit cell data, mark spelling errors, or add comments in the margins. Excel allows you to do all of these things electronically using the Track Changes and Comments features.

4 Understanding track changes

When you turn on the **Track Changes** feature, every cell you edit will be **highlighted** with a unique border and indicator. Selecting a marked cell will show the details of the change. This allows you and other reviewers to see what's been changed before accepting the revisions permanently.

5 Understanding track changes

In the image below, each edited cell has a blue border and a small triangle in the upper-left corner.

С	D	E	F	G	н	1	J
Length	ltem	Facilitator					
1:00	Breakfast, welcome	Exec team					
0:30	Introduction	Garth					
1:00	Work relationships exercise	Garth, Dean, Liz					
0:15	Break						
2:00	Cady Falls hike (strategy game?)	Tyler					
1:00	Lunch (with strategy game team)		lavier F	lores 11/	12/2015	1·51 PM·	
0:15	Strategy debrief	Julia 🗘	Change	d cell E13 fr	om 'TBD' t	o 'Julia'.	
1:00	Getting to know your team	See Liz for info					
1:00	Strengths exercise						
0:30	Break/Snack						
0:45	Redwoods hike	Dean					
1:00	Team-building exercise	Garth, exec team					
1:00	Dinner						
11:15							

here are some changes Excel cannot track. For example, you cannot use **Track Changes** if your workbook includes tables.

Turn on Track Changes

 From the **Review** tab, click the **Track Changes** command, then select **Highlight Changes** from the drop-down menu.

next/ to Irack changes while editing. Verify that the box is checked for Highlight changes on screen, then click OK.

Highlight Change	25		?	×				
Track changes while editing. This also shares your workbook. Highlight which changes								
<mark>∕ W</mark> he <u>n</u> :	All			\sim				
	Everyone			\sim				
Whe <u>r</u> e:				1				
Highlight changes on screen List changes on a new sheet OK Cancel								

6

7 Turn on Track Changes

3. If prompted, click **OK** to allow Excel to save your workbook.

Microsoft Excel	×							
This action will now save the workbook. Do you want to continue?								
OK								
Item	Facilitator							
Breakfast, welcome	Execteam							
Introduction	Garth							
Work relationships exercise	Garth, Dean, Liz							
Break								
Cady Falls hike (strategy game?)								
Lunch (with strategy game team)								
Strategy debrief	Javier Flores, 11/5/2015 11:13 AM							
Getting to know your team 🛛 🗘	Se Changed cell D14 from '?' to 'Getting to know							
Strengths exercise	your team'.							
Break/snack								
Redwoods hike	Dean							
Team-building exercise	Garth, exec team							
Dinner								

- 4. Track Changes will be **turned** on. A **triangle** and **border color** will appear in any cell you edit. If there are multiple reviewers, each person will be assigned a different color.
- 5. Select the edited cell to see a summary of the tracked changes. In our example below, we've changed the content of cell D14 from ? To Getting to know your team.

When you turn on Track Changes, your workbook will be **shared** automatically. Shared workbooks are designed to be stored where other users can access and edit the workbook at the same time.

8 List changes on a seperate worksheet

- You can also view changes on a new worksheet, sometimes called the Tracked Changes history. The history lists everything in your worksheet that has been changed, including the old value (previous cell content) and the new value (current cell content).
- I. Save your workbook.
- From the Review tab, click the Track Changes command, then select Highlight Changes from the drop-down menu.

ayout	Formulas	Data	Review	View	© Tel	l me what	you want t	to do			l
New Comment	Delete Prev	rious Ne	C Shov	v/Hide Con v All Comm v Ink	nment nents	Protect Sheet	Protect Workbook	Share Workbook	4∰ F ₩ / ₩ 1	Protect and Share Allow Users to Ed Frack Changes •	e Workbook it Ranges
		Comme	ents					Ch	₽	<u>H</u> ighlight Chan	ges
									\sim	A <u>c</u> cept/Reject (Changes

List changes on a seperate worksheet

3. The **Highlight Changes** dialog box will appear. Check the box next to **List changes on a new sheet**, then click **OK**.

9

. The tracked changes will be listed on their own worksheet, called **History**.

Highlight Change	25	?	×		A	В	С	D	E	F	G	н	Т
					Action							New	Old
Track changes v	while editing. This also shares your wo	rkbook.		1	Number 🔻	Date 💌	Time 💌	Who 💌	Change 💌	Sheet 🔹	Range 💌	Value 💌	Value 💌
				2		1 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	D14	Getting to know your team	?
Highlight whic	h changes			3		2 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	E11	Liz, Julia	<blank></blank>
When:	All		\sim	4		3 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	E15	Garth	<blank></blank>
				5	i a	4 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	E16	Wayne	<blank></blank>
Wh <u>o</u> :	Everyone		\sim	6	i .	5 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	A17	4:00 PM	4:15 PM
Where:			1	7	· (5 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	A19	7:00 PM	6:00 PM
			100.00	8		7 11/11/15	4:00 PM	Javier Flores	Cell Change	Agenda Planner	B19	8:00 PM	7:00 PM
- Highlight	changes on screen			9									
✓ nignigit	changes on screen			1	0 The histor	y ends with	the char	iges saved on	11/11/2015 a	t 4:00 PM.			
List changes on a new sheet			1	1									
OK Cancel					Agenda	Planner	History	+			: 4		

To **remove** the History worksheet from your workbook, you can either **save** your workbook again or uncheck the box next to **List changes on a new sheet** in the **Highlight Changes** dialog box.

Reviewing changes

Tracked changes are really just **suggested** changes. To become permanent, the changes must be **accepted**. On the other hand, the original author may disagree with some of the tracked changes and choose to **reject** them.

- From the Review tab, click Track Changes, then select Accept/Reject Changes from the drop-down menu.
- 2. If prompted, click **OK** to save your workbook.
- 3. A dialog box will appear. Make sure the box next to the **When:** field is checked and set to **Not yet reviewed**, then click **OK**.

s Data <mark>Review V</mark> iew Q Tel	l me what you want to do	Javier	Select Chan	ges to Accept or Reject	? ×
Show/Hide Comment		🚑 Protect Shared Workbook	Which chang	jes	
Show All Comments		🐺 Allow Users to Edit Ranges	Whe <u>n</u> :	Not yet reviewed	\sim
Show Ink	Sheet Workbook Workbook	🔂 Track Changes 🕶	Wh <u>o</u> :	Everyone	~
Comments	Chan	Highlight Changes	Whe <u>r</u> e:		1
		Accept/Reject Changes			OK Cancel

Reviewing changes

- 4. A dialog box will appear. Click **Accept** or **Reject** for each change in the workbook. Excel will move through each change automatically until you have reviewed them all.
- 5. Even after accepting or rejecting changes, the tracked changes will still appear in your workbook. To remove them completely, you'll need to **turn off** Track Changes. From the **Review** tab, click **Track Changes**, then select **Highlight Changes** from the drop-down menu.

Accept or Reject Changes	?	\times		
Change 1 of 7 made to this document: Javier Flores, 11/11/2015 4:00 PM:		^	s Data Review View Q Tell me what you want to do	Javier
Changed cell D14 from '?' to 'Getting to know your team'.			Previous Next Show Ink Show Ink Show Workbook Workbook Workbook	
			Comments Cha 📴 Highlight Changes	
Accept All Reject All Reject All	Clo	se	Accept/Reject Changes	

To accept or reject all changes at once, click **Accept All** or **Reject All** in the Accept or Reject Changes dialog box.

12 Reviewing changes

- 6. A dialog box will appear. Uncheck the box next to **Track** changes while editing, then click OK.
 - Click Yes to confirm that you want to turn off Track Changes and stop sharing your workbook.

Highlight Changes ? >	<
Track changes while editing. This also shares your workbook. Highlight which changes	
When: All	\sim
Who: Everyone	\sim
Where:	•
 Highlight changes on screen List changes on a new sheet 	
OK Cancel	

Microsoft Excel

This action will remove the workbook from shared use. The change history will be erased, and other users who are editing this workbook will not be able to save their changes, even if you share this workbook again.

No

Yes

Х

Remove the workbook from shared use?

- To make the workbook exclusive, click Yes.
- To cancel and return to shared mode, click No.

13 Comments

Sometimes you may want to add a comment to provide feedback instead of editing the contents of a cell. While often used in combination with Track Changes, you don't necessarily need to have Track Changes turned on to use comments.

14 Adding a Comment

 Select the cell where you want the comment to appear. In our example, we'll select cell D17.

	A	В	С	D	E
6	Start	End	Length	Item	Facilitator
7	8:00 AM	9:00 AM	1:00	Breakfast, welcome	Exec team
8	9:00 AM	9:30 AM	0:30	Introduction	Garth
9	9:30 AM	10:30 AM	1:00	Work relationships exercise	Garth, Dean, Liz
10	10:30 AM	10:45 AM	0:15	Break	
11	10:45 AM	12:45 PM	2:00	Cady Falls hike (strategy game?)	Liz, Julia
12	12:45 PM	1:45 PM	1:00	Lunch (with strategy game team)	
13	1:45 PM	2:00 PM	0:15	Strategy debrief	Julia
14	2:00 PM	3:00 PM	1:00	Getting to know your team	See Liz for info
15	3:00 PM	4:00 PM	1:00	Strengths exercise	Garth
16	4:00 PM	4:30 PM	0:30	Break/snack	Wayne
17	4:00 PM	5:00 PM	1:00	Redwoods hike 🗘	Dean
18	5:00 PM	6:00 PM	1:00	Team-building exercise	Garth, exec team
19	7:00 PM	8:00 PM	1:00	Dinner	
20	Total		11:30		

2. From the **Review** tab, click the **New Comment** command.

ayout	Formulas	Data	Review	View	♀ Tell			
New Comme	Delete P	revious Ne	Show	w/Hide Co w All Com w Ink	mment ments			
Comments								

15 Adding a Comment

- 3. A **comment box** will appear. Type your comment, then click anywhere outside the box to close the comment.
- The comment will be added to the cell, represented by the red triangle in the top-right corner.
- 5. Select the cell again to view the comment.

D	E
Item	Facilitator
Breakfast, welcome	Exec team
Introduction	Garth
Work relationships exercise	Garth, Dean, Liz
Break	
Cady Falls hike (strategy game?)	Liz, Julia
Lunch (with strategy game team)	
Strategy debrief	Julia
Getting to know your team	See Liz for info
Strengths exercise	Garth
Break/snack	Javier Flores:
Redwoods hike	DeHow long is this hike?
Team-building exercise	C.
Dinner	

D	E
Getting to know your team	See Liz for info
Strengths exercise	Garth
Break/snack	Wayne
Redwoods hike	Dean
Team-building exercise	Garth, exec team
Dinner	

E	F
Facilitator	
Exec team	
Garth	
Garth, Dean, Liz	
Liz, Julia	
Julia	
See Liz for info	
Garth	
W Javier Flores	
De How long is this hike?	
Ga	
	E Facilitator Exec team Garth Garth, Dean, Liz Liz, Julia Julia See Liz for info Garth Javier Flores: De How long is this hike? Ga

Editing a Comment

- 1. Select the **cell** containing the comment you want to edit.
- 2. From the **Review** tab, click the **Edit Comment** command.
- The comment box will appear. Edit the comment as desired, then click anywhere outside the box to close the comment.



D	E	F
ltem	Facilitator	
Breakfast, welcome	Execteam	
Introduction	Garth	
Work relationships exercise	Garth, Dean, Liz	
Break		
Cady Falls hike (strategy game?)	Liz, Julia	
Lunch (with strategy game team)		
Strategy debrief	Julia	
Getting to know your team	See Liz for info	
Strengths exercise	Garth	
Break/snack	lavier Flores:	
Redwoods hike	De How long is this hike?	
Team-building exercise	G.	
Dinner	mile.	1

17 Show/Hide Comments

- 1. From the **Review** tab, click the **Show All Comments** command to view every comment in your worksheet at the same time.
- All comments in the worksheet will appear. Click the Show All Comments command again to hide them.



D	E	F	G	н
ltem	Facilitator			
Breakfast, welcome	Exec team			
Introduction	Garth			
Work relationships exercise	Garth, Dean, Liz			
Break				
Cady Falls hike (strategy game?)	Lin Lulia Lavier Flores:			
Lunch (with strategy game team)	I think the game during	lavier F	lores:	
Strategy debrief	Ju the hike will be enough	ulia mig	ht be willing	g to
Getting to know your team	Se	ead this	activity.	
Strengths exercise	Garth			
Break/snack	W Javier Flores:			
Redwoods hike	Denow long is this hike?			
Team-building exercise	Ga			
Dinner	Liz told me it was only i	1		
	THE.			

18 Show/Hide Comments

You can also choose to show and hide individual comments by selecting the desired cell and clicking the **Show/Hide Comment** command.



Deleting a Comment 19

- Select the cell containing the comment you want to delete. In 1/. our example, we'll select cell E13.
- From the Review tab, click the Delete command in the Comments group.

Q Tel

View Show/Hide Comment Show All Comments

Comments

Review

🛆 Show Ink

The comment will be deleted. 3.

D	E	F	G	н	ayout	Formulas	Dat	ta
ltem	Facilitator					X	6	-
Breakfast, welcome	Exec team							5
Introduction	Garth				Edit	Delete P	revious	Ne
Work relationships exercise	Garth, Dean, Liz				Commer	nt 📐		
Break					8	N	Co	omme
Cady Falls hike (strategy game?)	Liz, Julia							
Lunch (with strategy game team)		1 Javier	lores					
Strategy debrief	Julia 🗘	Julia mid	iht be willing	to				
Getting to know your team	See Liz for info	lead this	s activity.					
Strengths exercise	Garth							
Break/snack	Wayne							
Redwoods hike	Dean							
Team-building exercise	Garth, exec team							
Dinner								

²⁰ Practice

- Open our practice workbook.
- Turn on Track Changes.
- Replace the value in cell **D14** with **Rope Bridge Activity**.
- Change cell E15 to say Julia.
- Save your workbook.
- List changes on a new sheet. After you do this, the worksheet should look like this:

	А	В	С	D	E	F	G	Н	1	J	К
	Action							New	Old	Action	Losing
1	Number 🝷	Date 👻	Time 💌	Who 👻	Change 💌	Sheet 👻	Range 👻	Value 👻	Value 🝷	Туре 🝷	Action -
2	1	11/27/2015	9:11 AM	John Doe	Cell Change	Agenda Planner	D14	Rope Bridge Activity	?		
3	2	11/27/2015	9:11 AM	John Doe	Cell Change	Agenda Planner	E15	Julia	<blank></blank>		
4											
5	The history	ends with the	e changes	saved on 11/27/	2015 at 9:11	AM.					

²¹ Practice

• Return to the Agenda Planner tab.

- Add a comment to cell E16 that says snacks will be provided by the exec team.
 - When you're finished, your workbook should look like this:

E16	· · ·	$\times \checkmark f_x$					
	А	В	с	D	E	F	G
1 2 3 4	B		Event: Location: Date:	Team-Building Retreat Waverly Point Nature Preserve August	AGENDA PLANNER		
6	Start	End	Length	ltem	Facilitator		
7	8:00 AM	9:00 AM	1:00	Breakfast, welcome	Exec team		
8	9:00 AM	9:30 AM	0:30	Introduction	Garth		
9	9:30 AM	10:30 AM	1:00	Work relationships exercise	Garth, Dean, Liz		
10	10:30 AM	10:45 AM	0:15	Break			
11	10:45 AM	12:45 PM	2:00	Cady Falls hike (strategy game?)			
12	12:45 PM	1:45 PM	1:00	Lunch (with strategy game team)			
13	1:45 PM	2:00 PM	0:15	Strategy debrief	Julia		
14	2:00 PM	3:00 PM	1:00	Rope Bridge Activity	See Liz for info		
15	3:00 PM	4:00 PM	1:00	Strengths exercise	Julia		n
16	4:00 PM	4:30 PM	0:30	Break/snack		John Doe:	he provided
17	4:15 PM	5:00 PM	0:45	Redwoods hike	Dean	by the exec	c team
18	5:00 PM	6:00 PM	1:00	Team-building exercise	Garth, exec team	,	,
19	6:00 PM	7:00 PM	1:00	Dinner			
20	Total		11:15				L

Accept All Changes, then turn off Track Changes.

