

Allowing Multiple Users to Share an Excel Workbook

Robert A. Poirier, CPA

You are the treasurer of a non-profit organization, and you have just volunteered your time and the use of your office for a fundraising event to be held next month. The organization will be holding a weekend-long telephone auction. There will be close to 50 items to be auctioned off, and five to ten people manning the telephones.

Because the phones will not be centrally located, but rather spread throughout the office; a chalkboard or a bulletin board won't be of any help. The main problem will be for you and the volunteers to be kept up-to-date as to the highest bid for each of the items.

Excel has just the solution. By allowing multiple people to share a single workbook over a network at the same time, each user can see all entries and any changes made by any of the other users.

Setting up a shared workbook

The first step that needs to be done is to create the original worksheet file that will be used to track the bids. It will need to be saved on the network where all users will have access to it. It can be as simple or as complicated as you need it to be. (See Exhibit A)

If you do not have the autosave feature available, you will have to install the "autosave" add-in program. Located on the Tools menu bar is the item "Add-Ins". Choosing that option leads to a chart listing the various add-in alternatives. Select "autosave add-in", and Microsoft will install the program automatically.

Next, you need to set the autosave to save the workbook every minute. A minute is the minimum unit of time available. (I'll explain later why the workbook has to be saved after each entry.) To turn on the autosave, click on "Tools" from the menu bar and click on "Autosave". Set the "Minutes" box to 1 after clicking on the "Automatic save every" choice.

Exhibit A

Volunteer	Bidder	Tel. #	Item 1	Item 2	Item 3
-----------	--------	--------	--------	--------	--------

Exhibit B

Volunteer	Bidder	Tel. #	Item 1	Item 2	Item 3
1	Mr. Brown	978-462-9912	150.00		
1	Mr. Brown	978-462-9912			500.00
2	Mrs. Gray	978-465-1215		210.00	
1	Mr. Yellow	978-462-1200			510.00
2	Mrs. Green	978-465-4190			
2	Mrs. Purple	978-462-7466	175.00		

Exhibit C

Volunteer	Bidder	Tel. #	Item 1	Item 2	Item 3
1	Mr. Brown	978-462-9912	150.00		
1	Mr. Brown	978-462-9912			500.00
2	Mrs. Gray	978-465-1215		210.00	
1	Mr. Yellow	978-462-1200			510.00
2	Mrs. Green	978-465-4190			
2	Mrs. Purple	978-462-7466	175.00		

Once the worksheet has been created and the autosave set, the workbook will need to be set up for sharing. To set up the workbook, click on "Share Workbook" from the "Tools" menu. The box "Allow changes by more than one user at the same time" in the "Editing" menu should be checked off. This screen will show you who has the file open.

Next, click on the "Advanced" menu. Be sure that the "Keep change history for" option has been



selected, and that enough days are allowed for the event to take place (30 should be sufficient in this case). It is also important to select "When file is saved" from the "Update changes" option, as well as "Ask me which changes win" from the "Conflicting changes between users". The latter alerts the users that conflicting data has been entered in the same cell by different users, and gives them the opportunity to resolve it.

Entering data

Each user must save their workbook before and after making any entries. This will help ensure that they are working with an up-to-date file. If there have been any entries or changes by any of the other users, the user will receive a message that the workbook has been updated. The entry will be included on the worksheet. If there has been no activity, saving will take place, and there won't be any message.

You can see the importance of saving before and after each entry. With the autosave feature turned on, updating will take place should someone forget to manually save. See Exhibit B and C for a representation of what each of their worksheets will look like after the first six entries have been made. Both users have an up-to-date and identical worksheet, and can quickly determine what the highest bids are.

Tracking changes

The purpose of tracking changes is to view information about all changes made to a workbook. To set up, go to "Tools", "Track Changes", "Highlight Changes", check off the box "When", and indicate "All". Then check off the box "Who", and indicate "Everyone".

There are two ways to view the history of changes. The first is to put the mouse pointer over a particular cell (displaying the most recent change and the user who did so). One can also choose to "List changes on a new sheet" by selecting that option. See Exhibit D for a partial view of the second option.

Exhibit D

Time	Who	Range	New Value	Old Value
1:09 PM	John	D3	150	<blank>
1:15 PM	Dave	F4	500	<blank>
1:45 PM	Martha	E5	210	<blank>
2:12 PM	Ann	F6	510	<blank>
2:25 PM	Mark	D7	175	<blank>

Users must be careful not to undo the box "Track changes while editing" as this will remove the workbook from shared use, wipe out the history of changes, and prevent other users from editing and saving changes to this workbook. This can be prevented from accidentally happening; each user should go to "Tools", "Protection", "Protect Shared Workbook", and check off the box "Sharing with track changes".

Although we have mentioned only a few aspects of working with a shared workbook in the simple example above, there are many others that should be considered. Try using the above techniques with a few workstations in your office, and you'll quickly discover how useful these features are.

We can help you make spreadsheets work for you, and show you how to use them for far more than simply adding a column of numbers. Please give us a call, and let us help you manage the numbers of your business more efficiently.

Your Best Financial Resource in a Changing World

*Thomas G. Ambrosi, CPA, MST, CVA, PFS, ABV • Michael A. Donahue, CPA, MST • Keith N. Congdon, CPA
Karin M. Wilks, CPA, MST • Carol M. Bushnell, CPA • Robert A. Poirier, CPA
Jenny L. Wilson, CPA • Julie R. Avant, CPA
Laura A. Smith • Debra L. McNeil • Edwin R. Cassidy • Dana A. Ambrosi
Linda A. Blake - Paralegal/Financial Services • Robert W. Cleary, MBA - Payroll Services*

Ambrosi Donahue Congdon & Co., P.C.

One Harris Street, Newburyport, Massachusetts 01950 USA • Phone 978.462.6674 • Fax 978.465.4756 • email cpa@adccpa.com • www.adccpa.com