

Boardwalk Excel Cloud Help Guide

Commonly used terms in this document

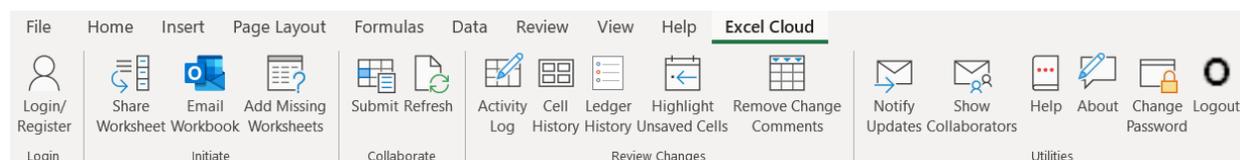
- **Digital Ledger:** The Digital Ledger is a temporal datastore that stores all cells and formulae of an Excel workbook individually and tracks their changes with a timestamp. The Digital Ledger runs in a secure cloud environment.
- **Save to EC:** Allows data in the current sheet to be saved in the database server (Digital Ledger) in the cloud.
- **Refresh Data from EC:** Retrieves data for all the changes from the Digital Ledger
- **Owner:** The person who initiates the collaboration. He/She emails an invitation with the workbook attached to the intended audience
- **Collaborator(s):** These are the team member(s) to whom the Owner has emailed the workbook.
- **Collaboration:** When an owner decides to share a workbook with one of more other users, a collaboration is initiated. This means that once invited and registered, all users can collaborate on a shared set of Excel data housed in the cloud. Users can simultaneously interact with the Excel data without locking, and all changes are captured and versioned at the cell level for review.
- **History:** Excel Cloud automatically keeps track of every change made by the Owner and Collaborator, so the user can view/review the sequence of changes which are timestamped in the Digital Ledger.

Getting Started

When you open the MS EXCEL document after installing Excel Cloud, you will see the menu items



When you click on the Excel Cloud menu, the following ribbon shows up.



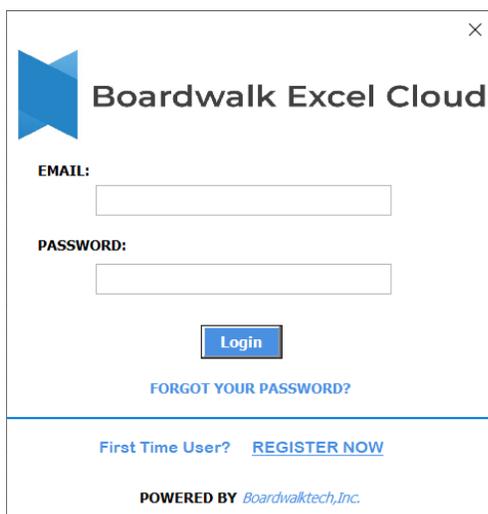
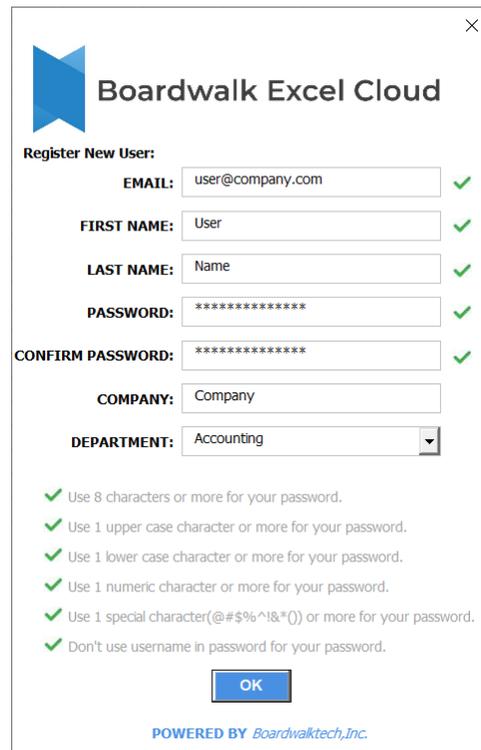
Each functional icon on the ribbon is explained below:

Initiating a Collaboration



1. Login/Register

In order to use Excel Cloud (EC), you must first Register. The registration process is very simple. Click on Login/Register then the **Register Now** link. Enter your name, email and establish a password. Once you are registered login requires only email and password.

The following password complexity is enforced:

- Password should contain minimum of 8 characters
- Password should have at least one UPPER CASE character
- Password should have at least one lower case character
- Password should have at least one numeric character
- Password should have at least one special character
- Password should not repeat characters
- Password should be different from the username
- Once all fields are correctly entered, you will see all green checkmarks, then click the OK to complete the registration.

You will then be automatically logged in.



2. Share Worksheet

Press on the **Share Worksheet** button when you are ready to share your changes with the other collaborators. This action saves your data locally as well as on the EC server. Note that if you are not already logged in, the Login/Register dialog will be displayed.

- The first time Share Worksheet is selected, the active worksheet tab is saved to the EC server
- A progress bar will be displayed that shows the data saving progress
- Any changes to values and formulae in the worksheet are submitted to the EC server and are now available for collaborators to view.

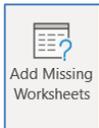
Excel Cloud uses a fully secured, transaction chained, time series based digital ledger database to allow seamless Excel collaboration.



3. **Email Workbook**

This feature is the cornerstone of collaborating using Excel Cloud. The workbook owner can initiate a collaboration by clicking **Email Workbook**. This will create an Outlook email with the workbook as an attachment. Put in the email addresses of the people you want collaborate with, then send them the email.

For non-Outlook email clients, Excel Cloud supports copying the pre-filled message text to the clipboard for pasting. The user can open create an email, paste the message, attach the workbook, fill in the emails and send it out for collaboration.



4. **Add Missing Worksheets**

As part of the collaboration, new worksheets may be added by the owner at any time. Collaborators are notified of new sheets available and can click **Add Missing Worksheets** to bring those sheets into their respective workbooks. Any new sheet(s) added by the owner is added to Collaborator's workbook. A progress bar is displayed when the sheets are added. This ensures that user is aware of the action being performed.

Collaborate



1. **Refresh**

Press on the **Refresh** command button when you are ready to bring in changes made by other users. Note that if you are not already logged in the "LOGIN" dialog will be displayed. Once you enter your credentials, the **Refresh** will commence, and a progress bar will be displayed that shows progress.

When the **Refresh** command is selected, the following happens:

- The first time **Refresh** is selected, all spreadsheet data is refreshed from the server in the cloud.
- From the second refresh onwards, only incremental changes are refreshed from the server.

You can see the changed values by hovering over the cells that have an Excel comment added to them.



2. **Submit**

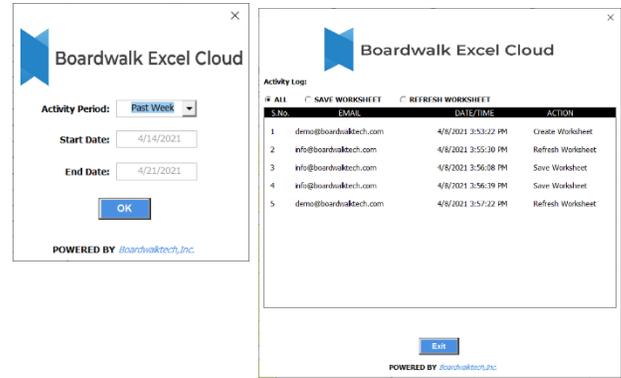
Press on the **Submit** command button when you are ready to share changes with other users. Note that if you are not already logged in the "LOGIN" dialog will be displayed. Once you enter your credentials, the **Submit** will commence, a Submit comment dialog box will display where you can type in a descriptive summary of the changes you are about to Submit, and then a progress bar will be displayed that shows progress.

Review Changes



1. Activity Log

The Activity Log can be opened on demand to see who all have Submitted changes to or Refreshed changes from the EC server. The first window that appears when you click View Cell History is the activity period. The activity period is defaulted to PAST WEEK. The date range can be changed by the user



2. Cell History

At any time, a user can review the **Cell History** to see who, what, and when the values were changed. This is done not only for the data but for formulae as well. The first window that appears when you click **Cell History** is the activity period. The activity period is defaulted to PAST WEEK. The date range can be changed by the user.

List of Updates on selected cell as of April 08, 2021 04:15:15 PM					
From		4/1/2021			
To		4/8/2021			
Updated Value	Formula	Formula Updated	Updated By	Updated On	Comment
500 Main Drive			info@boardwalktech.com	04/08/2021 04:12 PM	changed address
456 Main Drive			demo@boardwalktech.com	04/08/2021 04:09 PM	Link export new table

This is a unique feature of Excel Cloud that leverages transaction chaining. No data is lost and all changes are time stamped (with date/time and username) and stored. At any time, users can review the cell history to see how, who and when the values were changed. This becomes critical any multi-user collaboration or compliance application. This is done not only for the data but for formulae as well.



3. Ledger History

In addition to the **Cell History**, a user can review the **Ledger History** to see who, what, and when a **Submit** of changes were made to the shared worksheet (rather than an individual cell). Again, the first window that appears when you click **Ledger History** is the activity period. The activity period is defaulted to PAST WEEK. The date range can be changed by the user.

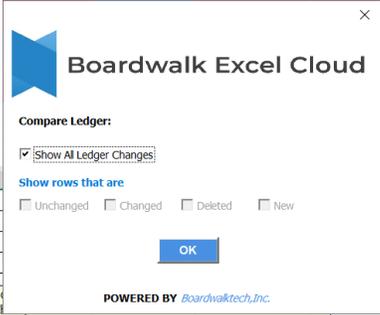
List of Updates on Ledger 'Shipments (Shipper)' as of April 08, 2021 04:15:36 PM								
From		4/1/2021						
To		4/8/2021						
Show Ledger at selected time		Compare Two Updates		Uncheck All				
	Updated By	Updated On	Comment	Rows Added	Rows Deleted	Columns Added	Cells Updated	Formulae Changed
<input type="checkbox"/>	1977	demo@boardwalktech.com	04/08/2021 04:09 PM Link export new table	Y		Y	Y	Y
<input checked="" type="checkbox"/>	1984	info@boardwalktech.com	04/08/2021 04:12 PM update				Y	
<input type="checkbox"/>	1985	info@boardwalktech.com	04/08/2021 04:13 PM more changes	Y			Y	Y

Ledger History provides powerful change management information. You can see who made an update, when, the associated comment, and then what they did to the actual data in terms of updating cells, adding/deleting rows/columns, or changing formulae.

Users can also select specific transactions – by clicking the box on the far left – and then select the **Show Ledger at Selected Time** or **Compare Two Updates** commands. Both commands will then display a dialog box where you can select what you want to see in terms of changes to the data.

This will then recreate the worksheet data as of the time(s) selected showing you either a single update or a comparison.

	C	D
7	Item Description	Hearts of Romaine
8	Commodity	Lettuce
9	Finished Product Variety:	Romaine
10		
11	Inquiry Date: From YYMMDD	200508
12	Inquiry Date: To YYMMDD	200510
13		
14	Company Name / Information Provider:	Produce Suppliers, Inc.
15	Company Contact:	Sam Smith
16	Company Phone #:	555-555-1212
17	Address: Street	500 Main Drive
18	Address: City	Anytown



Boardwalk Excel Cloud

Compare Ledger:

Show All Ledger Changes

Show rows that are

Unchanged Changed Deleted New

OK

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4. Remove Change Comments

Once the user has reviewed highlighted changes shown by Excel comments, the user can remove the comments with this command.

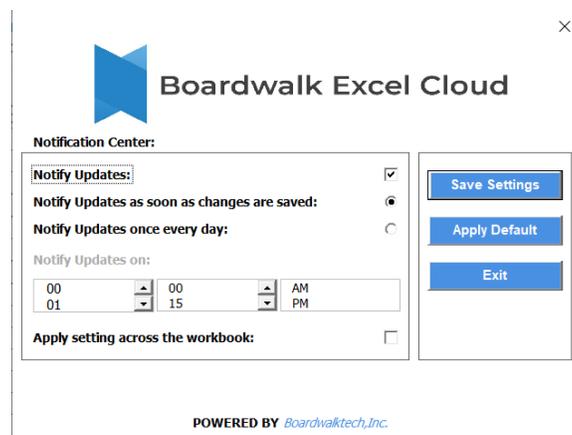
5. Highlight Unsaved Cells

If the user has been working on a worksheet for a long time, it is easy to lose track of the changes made. This feature will highlight all the changes made since the last **Submit**. This check helps to avoid accidental mistakes going to the EC.

Utilities

1. Notify Updates

Notifications provide transparency. Users can configure to receive notifications in real time or once a day as a digest. As you collaborate with users in different time zones, this functionality helps you to understand whether you need to **Refresh** and review prior to submitting your changes to the server.



Boardwalk Excel Cloud

Notification Center:

Notify Updates:

Notify Updates as soon as changes are saved:

Notify Updates once every day:

Notify Updates on:

00 00 AM

01 15 PM

Apply setting across the workbook:

Save Settings

Apply Default

Exit

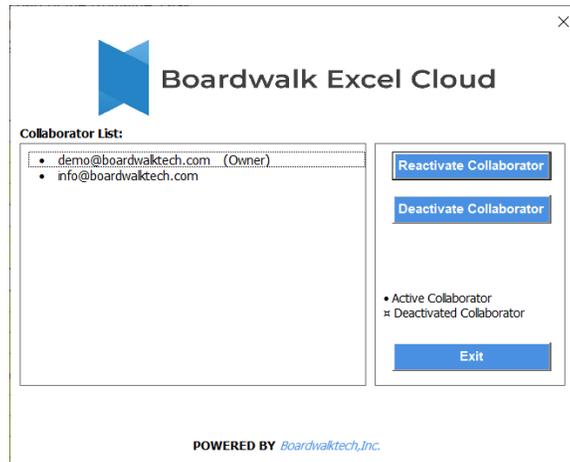
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The default setting for OWNER is immediate notification. This can be changed if needed. When a collaborator logs in for the first time, the Owner is notified regardless of configuration.



2. Show Collaborators

When the user clicks **Show Collaborators**, a window displays that lists the owner and all the collaborators. The owner can deactivate an existing user or reactivate them as necessary.



3. Other Utilities

Other utilities for accessing this help file or changing password are also available on the Excel Cloud menu bar.

