Managing Allocations in Excel

Workforce Compensation

There are ▮▮▮ different Excel functions for Workforce Compensation. The ▮▮▮▮▮▮▮▮ function is a quick way to get a copy of the current view of the worksheet when you do not need to upload any changes. The ▮▮▮▮▮▮▮▮▮▮▮ function is a two-way process for ▮▮▮▮▮▮▮▮▮▮▮ and ▮▮▮▮ Using this functionality, you can enter recommended allocations and changes in an ▮▮▮▮▮▮▮ and then upload them to the Comp worksheet.

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This function is available in both the ▮▮▮▮▮▮▮▮▮▮▮ worksheets and provides a read-only view of the worksheet data based on what the worksheet filters have been set to and what worksheet columns have been selected to view.

> **NOTE:** If the ▮▮▮▮▮ is set to ▮▮▮▮▮▮▮▮▮▮▮, the export will show values in local currency; whereas if this is changed to ▮▮▮▮▮, the export will be in USD.

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This function allows for the Compensation worksheet to be ▮▮▮▮▮▮▮▮▮ and **includes direct and indirect reports** in your organization. It also allows you to enter allocations and changes and ▮▮▮ them back to the application worksheet. A great benefit of this capability is that you can make allocation changes when offline and then ▮▮▮ the changes the next time you log in. Allocations made using the ▮▮▮▮▮▮▮▮▮▮▮▮▮ are always in ▮▮▮▮▮▮▮▮.

> **NOTE:** The ▮▮▮▮▮▮▮ from ▮▮▮ does not accomplish submitting your worksheet. The Compensation worksheet in the application is what must be submitted for approval.
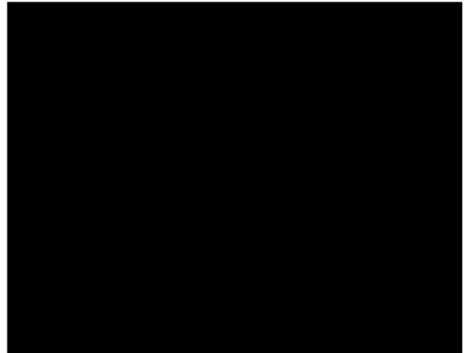
Setup requirements for ▮▮▮▮▮▮▮▮

To use the ▮▮▮▮▮▮▮▮▮▮▮▮▮▮ you will need to install the ▮▮▮▮▮▮▮▮ ▮▮▮▮. The link to download the ▮▮▮▮▮▮▮▮▮▮▮▮r can be found in the ▮▮▮ menu in the system ▮▮▮▮▮ and on the ▮▮▮▮▮▮▮. (See the ▮▮▮▮▮▮▮▮ reference guide for details on the installation process.)

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Steps to Use the ████████████████████

- Access the ████████████ for the plan

- Click the ████████████████ icon in the toolbar.

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- In the ████████████████ window, use the default ████████ ████████ option to open the file and click ████

- In the ████████████, click ████

- Following this the ████████ will appear. Sign in using your SSO user name and password.

- The ████████ window will open and the worksheet will begin downloading.
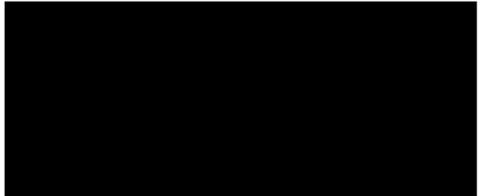
   NOTE: It is recommended that you save the file to avoid tying up your browser.

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Working in the Spreadsheet

The downloaded Excel spreadsheet will appear to be in read-only mode however, the spreadsheet is actually in a "Protected" mode. The status in column "D" will show if any lines failed to load.

- *Filters:*
  - right-click to access column filter options
  - columns cannot be rearranged in download view

- *Entering data:*
  - Only the white cells are editable and will upload back to the worksheet
  - Currency needs to be retained in the workers' local currency
  - Common available cells between plans are ▇▇▇▇▇▇▇
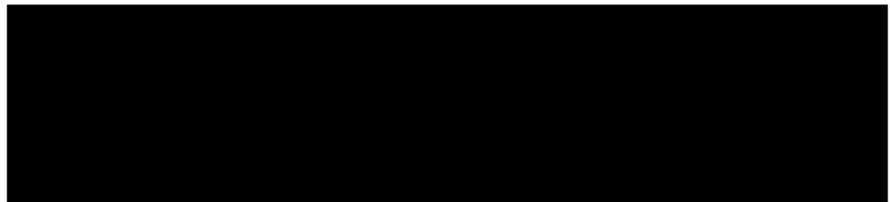
- *Upload:*
  - Click the **Upload** icon at the top of the spreadsheet
  - You should receive a confirmation that the upload was successful

<u>Confirm Upload Success</u>

- Return to the **Comp worksheet** to confirm the changes have uploaded successfully
  - Refresh the worksheet data by running a filter such as the ▇▇▇▇

NOTE: The ▇▇▇▇▇▇▇▇▇ can be used to make additional changes as long as the worksheet has <u>not</u> been submitted for approval.

When ready with your final allocation choices, ▇▇▇▇▇▇▇

IMPORTANT: DO NOT SUBMIT until ▇▇▇▇▇▇▇ have submitted their work to you. Your submittal ▇▇▇▇▇▇▇ And, once you click the ▇▇▇▇▇, you will not be able to make further changes and will only be able to view the worksheet.