Distribute and Publish Budgets
Workforce Compensation

In the Budget worksheet, managers can manually distribute budgets, publish budgets and withdraw published budgets.

**Budget Worksheet Overview**

- Access the Budget worksheet for the plan from either the menu in the Tasks pane or the list of .
- The worksheet consists of two sections: and . In either section, the columns can be rearranged by dragging and dropping the column headers.

**Budget Summary**

The **Unpublished Budget** amount (shown under ) is the total budget you have reserved for yourself and your subordinate managers but have not yet published for them to actually see in their worksheets.
Budgets and budget access levels for subordinate managers are set in this section of the worksheet. Subordinate managers must have the Manager role and the appropriate budget access level to perform any actions. The **Budget Access Levels** of your subordinate managers are initially predetermined by the selection made when you first accessed your own budget worksheet. *(See the Select Budget Method video and reference guide).*

**Manually Distribute Budgets**

Budget distributions to subordinate managers can be managed by manually entering amounts in the ** Budget Distributions** section of the worksheet or by creating and applying a budget model. Distributed budgets must be published (or “passed down”) before subordinate managers are able to view and manage their budget.

- To distribute portions of the overall budget, enter an amount in the ** Budget Distributions** column for yourself and your subordinate managers.
  
  Note that the first row in the worksheet will display **Manager** as the Manager name. The budget distribution amount that you enter in this row is the amount you will use to make allocations to your direct reports. Entries may be made in either the Amount or Percentage field and the system will update the other field accordingly.

- Click **Save** or **Apply** when done with all entries.

**Publish (Pass Down) Budgets**

Budgets must be published before subordinate managers can view them in their own worksheets.

- Navigate to the budget worksheet.

- In the ** Manager** section, highlight the row of the manager you wish to publish a budget for. To publish multiple manager budgets, hold down the CTRL key and highlight each of the selected managers’ rows.

- Use the drop down menu on the ** Publish** icon and select the option to **Publish** or **Pass Down**.
In the [popup window], enter text in the Comments box for the notification about the budget change to the impacted manager or managers. System notifications are accessed in the top menu of the application. Click [not visible].

**NOTE:** All higher-level managers will have access to see this notification message.

- When done with all entries, click [not visible] or [not visible].

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**Withdraw Published Budgets**

- Navigate to the budget worksheet

- In the [section], highlight the row of the manager you wish to withdraw a published budget from. To withdraw multiple manager budgets, hold down the CTRL key and highlight each of the selected managers’ rows.

- Use the drop down menu on the [not visible] and select the option to [not visible] or [not visible].

- In the [popup window], enter text in the Comments box for the notification about the budget change to the impacted manager or managers. System notifications are accessed in the top menu of the application. Click [not visible].

**NOTE:** All higher-level managers will have access to see this notification message.

- When done with all entries, click [not visible] or [not visible].