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.

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.

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 can be found in the menu in the system and on the . (See the reference guide for details on the installation process.)
Steps to Use the

- Access the [ ] for the plan
- Click the [ ] icon in the toolbar.
- 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.
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

Confirm Upload Success

- 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 not been submitted for approval.

When ready with your final allocation choices, 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.