Toolbar Tips for the Budget Worksheet
Workforce Compensation

Also see the Hints & Tips for Using Workforce Compensation reference guide.

This reference guide defines the toolbar options for viewing and working with the budget worksheet.

This option allows for adjusting worksheet for an individually selected manager. (See the Setting User Access module for details on each option.)

View
You can view a summary of activity and track what changes have been made in the system and see when the changes were made for a selected person in the worksheet or yourself.
From this menu option you can choose to show or select to hide/show individually. Hiding is effective for the current session only and must be repeated every time you log out and log back in. Alternatively, you can right-click on the to access this option.

Select a column on the worksheet and click to ensure the columns to the left of your selection remain in place during horizontal scrolling. This option is also available when you right-click on a column or by selecting the columns using this method is effective for the current session only and must be repeated every time you log out and log back in. If you wish to save this customization for future sessions and other compensation plan worksheets, save a default worksheet display (see menu).

The function is a one-click option to maximize your worksheet view and reduce scrolling. You may find this easier than working offline in a spreadsheet. To revert back to the default view, click in the drop down menu or use the toolbar button for this reversible function.

This menu allows you to choose of a selected worksheet column. The option allows for a selection of up to based on the columns available. These options are also available when you right-click on a column.

Here you can select a custom order of the visible columns using the up/down arrows. Alternatively, you can drag and drop columns into a different position within the worksheet by clicking the column header and dragging it to the new position.

Changing the column display sequence is effective for the current session only and must be repeated every time you log out and log back in.
This option allows for changing the size of all selected columns specifying number of pixels or percentage. When you downsize a column width the column header will wrap. This option is also available when you right-click on a column or by holding your cursor between columns until the resize icon appears for you to click and drag the column divider.

The content of cells in the selected columns will be modified with this selection. A separate toolbar icon is available for this same function or right-click on a column for this option.

Budget models make it easy to see how different allocation methods and criteria affect your budget. Many different models can be created, previewed and applied to the budget worksheet. (See the Create and Apply Models modules for details.)

Budgets must be saved before subordinate managers can view them in their own worksheets. The options to save budgets are available in this menu. (See the Save module for details.)