SecureSheet Help

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Welcome to SecureSheet

SecureSheet is an online spreadsheet that has been set up for your business to securely collect data from multiple users simultaneously, with specific rules and security settings so that every end user can only see and edit the data in the spreadsheet that is applicable to them.

SecureSheet allows your organization to share one spreadsheet with an entire team and organization and control who gets to see what data so everyone is working with the latest version real-time - safely and secured. All you need is a browser.

If you have ever used a spreadsheet, there are many similarities to the look-and-feel of SecureSheet so data input can easily begin right away.

To view a recorded live demonstration of SecureSheet, click here.

For All Users

If you are just starting to use SecureSheet, login and become familiar with SecureSheet basic navigation.

For End Users

Click here for a quick reference to the most commonly performed end user tasks. Because each organization is unique, each SecureSheet is also unique. Any organization-specific guidance and instructions will come from your internal organization.

For SecureSheet administrators

As you work with the administrative processes and their associated tasks, you will become more familiar with SecureSheet and be able to perform many - if not all - of the tasks independently. Search and read the help instructions and refer to the Administrator Processes and Tasks for a quick reference to get started and access the most commonly performed tasks.

Year 1 Process

Each SecureSheet project follows the same basic implementation steps to drive you to a successful launch of your process that is being supported by a SecureSheet. During project kick-off, the SecureSheet Customer Success team reviews the SecureSheet Implementation Plan to set milestone dates and initiate first steps for the project. The Implementation Plan is set up as a SecureSheet itself, found in your organization's SecureSheet site for on-going reference throughout the project, and is able to be updated by any SecureSheet administrator in your organization.

Find a PDF of the SecureSheet Year 1 Process here.

> **NOTE:** You will need a PDF viewer in order to open this file. If you do not have a PDF viewer or are unsure or unable to download one, please check with your organization's technical support team for assistance.

Year 1 Process

Step		Description	Expected Timeframe	Te Respo
1.0	**Kick-off**	Client reviews their compensation planning business requirements with the SecureSheet team.	Week 1	Bo
1.1	Planning timeline	Identify milestones including start date, testing start date, manager training date, system open date, lockout dates, statement distribution date, system freeze date.	Week 1	Cli
1.2	Employee population	Describe employee population including size and geographic distribution.	Week 1	Cli
1.3	Data update cycle	Discuss data management while system is open to managers.	Week 1	Cli
1.4	Administrators and key users	Identify system administrators on client side as well as any other key users or contacts.	Week 1	Cli
2.0	**Review Excel Structure**	Client adds 5 columns to the left of the existing Excel file, reserved for SecureSheet processing. Client uploads Excel file(s) currently used to support compensation process to File Attachments section of SecureSheet site.	Week 1	Cli
2.1	Validate initial file load in SecureSheet	SecureSheet loads initial Excel file.	Week 1	Secur
3.0	**Set Up Working Model**	SecureSheet team uploads "Users-Views" SecureSheet for Client to define views and column settings per view, and identify users and their security permissions.	Weeks 1 and 2	Bo
3.1	Complete Users-Views Input	Import filled in "Users-Views".	Weeks 1 and 2	Cli
3.2	Create SecureSheet working model	Create a working model based on "Users-Views" input for Client review.	Weeks 1 and 2	Secur
3.3	Review working model	Client does initial testing and provides feedback on working model. Client and SecureSheet incorporate changes.	Weeks 1 and 2	Bo
3.4	Review user list	Review user list, security and business process roles, and impersonators (if applicable).	Weeks 1 and 2	Cli
3.5	Review submission process	Finalize submission timelines (lock dates on Views).	Weeks 1 and 2	Cli
3.6	Review summary information	Confirm format and calculations for summary totals in header rows. Setup Summary views (if applicable).	Weeks 1 and 2	Bo
4.0	**Single-Sign On setup (if required)**	SecureSheet provides SSO instructions, metadata file, and whitelist instructions. Client provides their metadata file with authentication certificate. SecureSheet and Client configure respective side and test.	Weeks 1 and 2	Cli
5.0	**Compensation**	Client provides Compensation Statement(s) that support	Week 1 or 2	Cli

	Statement design review	their end-of-cycle communication process. Review Statement(s) to ensure all data fields are on the main SecureSheet.		
5.1	Compensation Statement(s) set up	SecureSheet team sets up Statement Template(s) and Views. Client map columns from main planning tab to the appropriate locations in the Statement Template(s).	Weeks 2, 3, and 4	Bo
5.2	Review Compensation Statement(s)	Client reviews Compensation Statement(s) for formatting and accuracy.	Weeks 3 and 4	Cli
6.0	**On-line Review Meetings**	SecureSheet team hosts review meetings of the working model and the Compensation Statement(s), and transfers knowledge for testing phase.	Ongoing	Bo
7.0	**Client Testing**	Client validates user experience by impersonating different users based on role (e.g., Manager, Director, VP, Executive, HRBP) for the following: - views - security - formulas - summary totals - submission/approval process - statements	Weeks 2, 3 and 4	Cli
7.1	SecureSheet updates	Iterative Client review. SecureSheet team makes necessary changes to support business process.	Weeks 2, 3 and 4	Bo
8.0	**Identify Data Management Requirements**	SecureSheet team and client identify process to refresh data in the SecureSheet application. NOTE: For the audit trail in SecureSheet to track your changes in alignment with how you manage data: - Once you go live, after rows are added, if you plan to lock out users, export and resort data then reimport, tell SecureSheet Support so we can turn on the setting that will keep cell history aligned with the row unique ID (not the default which is the row number in excel).	Week 4	Bo
8.1	Knowledge transfer to client	SecureSheet team transfers knowledge on import/export process to manage data and user changes.	Week 4, 5 or 6	Bo
9.0	**Refresh Data (if required)**	Client clears test data and imports the data set in the same format as SecureSheet with the "go-live" data.	Week 4, 5 or 6	Cli

10.0	**Final Review and Sign-Off**	Client verifies that SecureSheet is complete to client specifications.	Week 4, 5 or 6	Cli
11.0	**Training**	SecureSheet trains key client personnel. Client trains end users on SecureSheet. Client can use all Help content as source to modify for any specific end user instructions.	Typically one to two weeks prior to Go-Live	Cli
12.0	**Go-Live**	Final data is loaded, any test data is cleared.	Go-Live date	Cli
12.1	Final review and approval	Client reviews and approves SecureSheet is ready to be opened for users.	Go-Live date	Cli
12.2	Activate SecureSheet for users	Client makes the SecureSheet "Active" and notifies users.	Go-Live date	Cli
13.0	**Post Go-Live Support**	SecureSheet is available to help answer/resolve any issues after Go-Live.	Typically Go-Live date plus 1 or 2 weeks	
14.0	**Lock sheet/rows as required**	Lock out different levels as needed through the approval process.	As required	Cli
15.0	**Reopen SecureSheet/Generate Statements**	Reopen SecureSheet to various levels and generate statements (if required).	As required	Bo
16.0	**Continuous Improvement Process**	Client identifies future revisions based on user feedback after Go-Live.	After Go-Live	Cli
16.1	Project debrief	SecureSheet supports project debrief as desired to capture insights and lessons learned for future cycles.	Typically 3 weeks post Go-Live	Bo

Year 2 and Beyond Process

The second year and beyond that you use SecureSheet to support your process(es), the previous year's SecureSheet is the starting point. In successive years, changes may be made to the structure of your SecureSheet, e.g., you may decide to add additional columns. Highly likely, you will have changes in your users. The steps in this process guide you through the updates you will need to make to get ready for your next cycle. Our goal is to enable administrators to perform as many administrator functions in SecureSheet as possible by partnering with you for success. Should any additional special security considerations or process changes need to be considered, the SecureSheet support team will assist with determining the best approach and making any advanced updates.

Find a PDF of the SecureSheet Year 2 and Beyond Process here.

> **NOTE:** You will need a PDF viewer in order to open this file. If you do not have a PDF viewer or are unsure or unable to download one, please check with your organization's technical support team for assistance.

Year 2 and Beyond Process

Step		Description	Expected Timeframe	Te Respo
1.0	**Getting Started**	Client reviews any necessary updates to the structure of their prior year's compensation planning SecureSheet.	Week 1	Bo
1.1	Export Previous Year to Excel	Export the previous year's sheet three ways: a full export to Excel (including Cell History), export the views, and export sharing.	Week 1	Cli
1.2	Make Copies	Make a copy of your previous year's compensation SecureSheet and the Users-Views SecureSheet.	Week 1	Bo
1.3	Hide SecureSheets	Move both SecureSheets to the Hidden area of your site.	Week 1	Bo
1.4	Rename Current Cycle Copies	Rename both SecureSheet copies for the current cycle, and update the Group Name.	Week 1	Bo
1.5	Archive Previous Year and Delete Unused	Archive the previous year's SecureSheet (both your compensation SecureSheet and the Users-Views SecureSheet). Delete any unused additional SecureSheet(s).	Week 1	Bo
2.0	**Set Up the SecureSheet Structure for the Current Cycle**	Ensure the structure of SecureSheet matches any updates you plan to make to the column structure for the current cycle. If you have security considerations or process changes, consult the SecureSheet support team to review any advanced updates.	Week 1	Bo
2.1	Structure Changes	If you are adding to and/or deleting column(s) from your data model, first insert and/or delete the column(s) online in SecureSheet before importing an excel file with a different column structure. This preserves the setup that was already done during the previous cycle.	Week 1	Cli
2.2	Export New Structure	Export your compensation SecureSheet with the newly inserted / deleted column(s).	Week 1	Cli
2.3	Refresh Data	Refresh data (as much as possible) in Excel. Remember that you may import as often as needed before opening up SecureSheet to planners.	Week 1	Cli
2.4	Update Compensation Statement(s)	Note any column mapping changes on the statement tab(s) in Column M or beyond. Do not make notes in any other column as logic is likely built in throughout the cells in the statement. Make wording updates and highlight any text changes or additions. The SecureSheet Support Team will refresh the statement logic as needed.	Week 1	Bo
2.5	Import Updates	Import your updated compensation spreadsheet to SecureSheet.	Week 1	Cli
2.6	Adjust Views	Adjust the Views by setting any inserted columns to locked, unlocked, or hidden, and adjust the columns per	Weeks 1 and 2	Bo

		view to accommodate being able to see any inserted columns in addition to those already set to see in the View. Audit the Add Row(s) view to ensure column changes are accurately reflected (only value-based columns should be unlocked in this view - all others hidden).		
2.7	Update View Security Filters and View Locking	Adjust the filters #emailxref and #emailruxref filters (e.g., if columns shifted, and the Users tab reference number (if there is a new Users-Views SecureSheet, not the prior year's just updated), adjust lock dates on views, take Print Options out of the Export Options field until ready to communicate this year. Check Row Locking, if applicable (e.g., if columns were columns inserted, then ROW-S may be different).	Weeks 1 and 2	Bo
3.0	**Refresh Sharing**	Sharing profiles need to be updated to only current cycle end users.	Week 1 and 2	Cli
3.1	Export Current Users-Views	Export the Users-Views SecureSheet.	Week 1 and 2	Cli
3.2	Remove Past User Sharing	Remove Sharing for all users in the previous cycle (except Administrators). This ensures sharing is refreshed from scratch for your next cycle. Use the export of your prior Users-Views to get the list of users to remove.	Week 1 and 2	Cli
3.3	Update Users and View Permissions	Refresh the Users tab by removing any users who no longer need access to SecureSheet and adding any new users, and check view assignments.	Week 1 and 2	Cli
3.4	Import User Tab Updates	Import the updated Users-Views spreadsheet to SecureSheet.	Week 1 and 2	Cli
3.5	Update Sharing	Refresh Sharing based on your refreshed Users tab, sharing secured views for the start of the cycle and setting the default view.	Week 1 and 2	Cli
3.6	Refresh Impersonation	Refresh the Impersonation List SecureSheet as needed. Most clients refresh their existing impersonation list cycle-over-cycle. However, if you choose to copy your impersonation list, tell your SecureSheet Support contact so the impersonation list setting may be updated on your site (only the SecureSheet Support Team may do this).	Week 1 and 2	Cli
4.0	**Clean Up Email (User) Administration**	Year-over-year, SecureSheet users will change. These steps ensure the most up-to-date user information is in SecureSheet by removing user emails who no longer need access to SecureSheet.	Week 1 and 2	Bo
5.0	**Test Your Updates and Prepare for Go-live**	Validate the setup for your cycle.	Weeks 2, 3 and 4	Cli
5.1	Impersonate End Users	Impersonate all end user roles and validate security set up and view set up (column settings and data entry per view).	Weeks 2, 3 and 4	Cli
5.2	Validate	Export each statement variation (cover all logic scenarios as	Weeks 2, 3 and 4	Cli

	Statements	applicable) and validate statement mapping accuracy.		
5.3	Refresh Training	Refresh training documents. If you keep the same pdf file name, replace the file in File Attachments; the link(s) to it will remain the same. If you change the pdf file name, any link to it will have to be replaced. Refresh the demo SecureSheet if needed.	Weeks 2, 3 and 4	Cli
5.4	Prepare for Go-live	Complete Go-live checklist.	Weeks 2, 3 and 4	Cli
6.0	**Continuous Improvement Process**	Client identifies future revisions based on user feedback after Go-Live.	After Go-Live	Cli
6.1	Project debrief	SecureSheet supports project debrief as desired to capture insights and lessons learned for future cycles.	Typically 3 weeks post Go-Live	Bo

End User Tasks

SecureSheet's online help is designed to support the main tasks you will perform in the system. Because each organization is unique, each SecureSheet is also unique. Any organization-specific guidance and instructions will come from your internal organization.

Here is a quick reference to the tasks you may perform in SecureSheet as an end user:

- Login to SecureSheet
- Learn how to navigate in SecureSheet
- Impersonate other users (if applicable to your role in your organization)
- Export your SecureSheet view to Excel
- Import your Excel data back to your SecureSheet view
- Print compensation letters for your employees
- Search for specific data in SecureSheet

Videos:

- Navigate SecureSheet
- Impersonating a User
- Export Statements

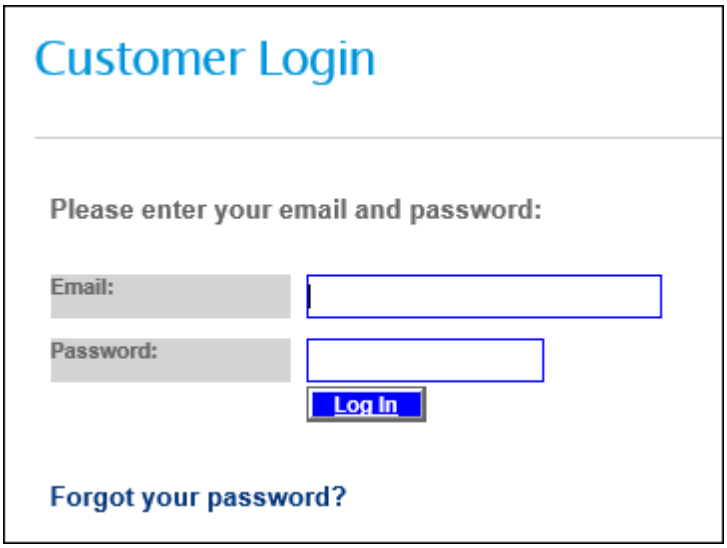
To view a recorded live demonstration of SecureSheet, click here.

Login to SecureSheet

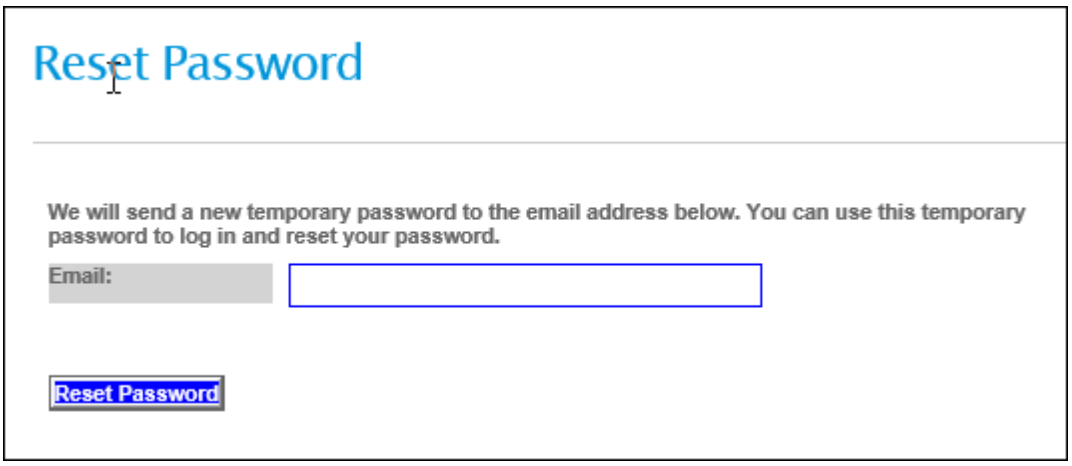
First Time User Login

If your organization is using Single Sign On, you will be directed where to login to SecureSheet internally.

1. Click here to access the SecureSheet login page.
2. Click **Forgot your password?** or this reset password link.



3. Enter your **Email** and click **Reset Password**.



4. Check your email for your temporary password.
5. Go back to the SecureSheet login page.
6. Enter your Email address in the **Email** field.
7. Enter the temporary password you received in the **Password** field.
8. Click **Log In**. Follow the prompts to set your permanent password.

> **NOTE:** IF you forget your password, you can reset it anytime by clicking this reset password link, or by clicking '**Forgot your password?**' on the SecureSheet Login screen.

More information about passwords:

- The system will prompt for a reset password for the first login attempt beyond 90 days.

- Here are the guidelines for passwords (strong passwords must meet the following minimum standards):
  - at least eight (8) characters in length (this is configurable by organization)
  - contain at least one lowercase character
  - contain at least one number
  - contain at least one special character
  - contain at least one uppercase character

- updated every 90 days (though this policy is not necessarily deemed safer by security experts)
- SecureSheet can set a "Strong Psasword" option for your organization with your defined minimum password length

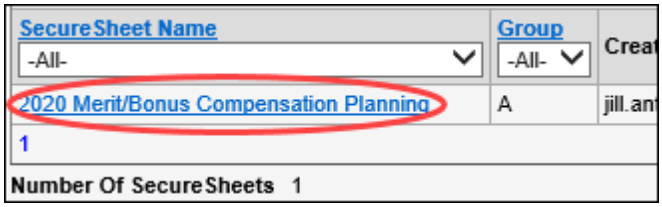
NOTE: If desired, SecureSheet can set a strong password option for your organizatoin so that the password expires every 90 days and passwords must include special characters

Navigate in SecureSheet

Video: Navigate SecureSheet

Your Home Screen

When you login, you will default to your SecureSheet home page. Click the SecureSheet link to open your view of SecureSheet.



Top Right Navigation

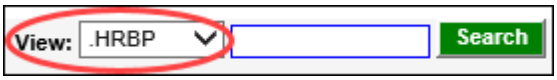
a. Click **<<Go Back** to navigate to a previous window in SecureSheet. The browser back button should not be used to navigate when you are working in SecureSheet.
b. Click **Refresh** to reset filters and sorting, or to clear data you have entered but do not want to save.
c. Click **Help** to access SecureSheet online help.
d. Click **Contact Us** to email your internal support contact.
e. Click **Log Out** to exit SecureSheet.
f. Click the **Zoom** drop-down to increase or decrease the font in your SecureSheet window.

Save Changes

Click Save Changes(Alt+S) to save your work in SecureSheet. **Save Changes** will calculate any formula-driven cells while you are working in SecureSheet (i.e., calculated cells that are dependent on your data entry will not calculate until you click **Save Changes**).

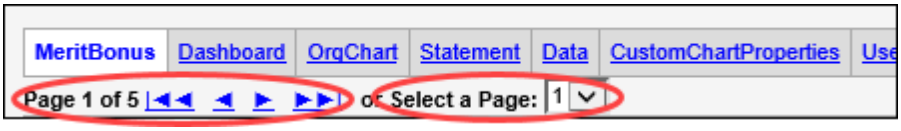
Multiple Views

Select the “View” drop-down to see alternate views of the SecureSheet. A drop-down will only appear if you have been given access to more than one view.



Moving through Pages

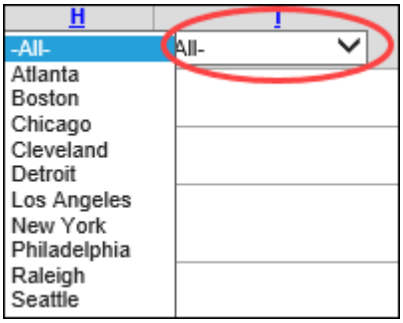
If you have more rows than are able to scroll in the window, use the arrows or the **Select a Page** drop-down list to navigate to additional rows of data.



Filters

When a filter is applied to a column, there will be a drop-down below the column ID.

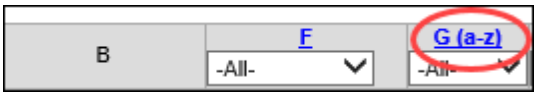
- Click the drop-down and select a value from the list.
- To remove the filter, select "All" from the filter drop-down or click the **Refresh link** in the top right navigation links.



Sort

When sort is available on a column, the Column ID (at the top of each column) will be underlined in blue.

- Click the underlined Column ID to sort ascending (a to z).
- Click the underlined Column ID again to sort descending (z to a).



NOTE: Only one column is able to be sorted at a time.

Export View

Click **Export View** to export the data in your current view to Excel. Follow the prompts that appear.

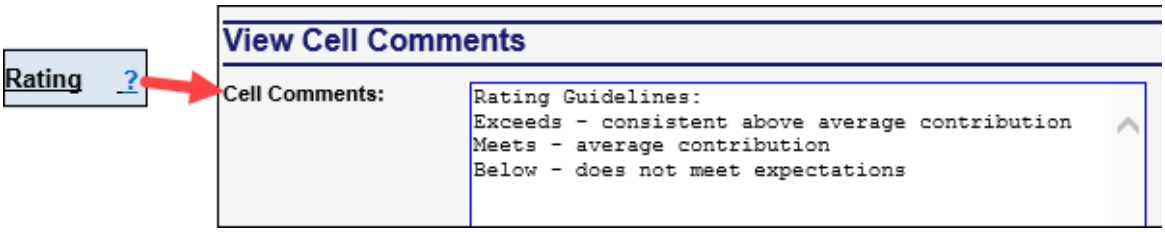
Scrolling Across Columns

Use the horizontal scroll bar at the bottom of the window to scroll from left to right and back to view columns.

Viewing Cell Notes

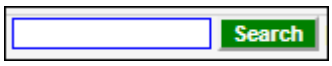
If a cell has notes associated with it, you will see a question mark in the cell.

- Click the question mark to see the notes appear in another browser tab.
- Closing the browser tab with the notes will not impact your main SecureSheet browser tab.



Tips for Searching Data in SecureSheet

Here are some simple tips to search for specific data in SecureSheet. You may enter search parameters in the Search box, then click **Search** to see your results.



Examples using Search to return specific rows or values:

- Enter **123** in the search box. All rows where 123 is found will be returned.
- Enter **A=123** in the search box. SecureSheet looks in column A for the value 123, so you can limit the rows by value in a column. This can be an alphanumeric string.
- Enter **A=123,456,987**. SecureSheet looks in column A for the EXACT values of 123 or 456 or 987 (which may be helpful if searching Employee IDs, for example). This cannot be an alphanumeric string.
- Enter **ROWS(5,10,3000)**. This will return rows 5, 10, and 3000.
- Enter **ROWS(55-102)**. This will return rows 55 through 102.
- Enter **CHARACTERS** in the search box, where CHARACTERS is the alpha or alphanumeric string that you are looking for specifically. SecureSheet will return all instances of where it finds this string in any column in the SecureSheet (e.g., awonder).

Export Statements

At the end of your Compensation Planning cycle, you can export compensation statements for each of your employees through SecureSheet. Statements may be exported individually or in a batch. In both instances, statements are exported to a .PDF file, which you can open and share with your

employees. When you export statements in batch, the batch file exports the individual statements in your view to a zip file containing each statement.

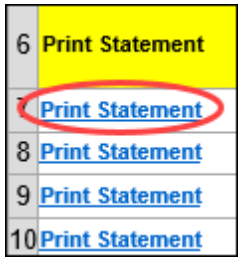
If you have over 500 statements to export, consider exporting in batches up to 250 rows at a time. If you choose to export a large batch, it will take several minutes for the export to complete (2 - 3 seconds per statement as a benchmark).

- If you have a large group to export, you may filter the rows in your view first (e.g., by using the filter on the manager or department column).
- You may use the Search box to narrow the rows to a manageable number before exporting the batch. For example:
    - In the Search box, type **ROWS(12-250), click Search, click Export View**; then type **ROWS(251-500), click Search, click Export View**.

Video: Export Statements

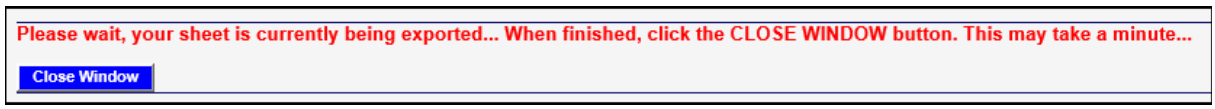
Printing/Exporting Statements Individually

1. Login to SecureSheet.
2. Click the SecureSheet listed on your home page.
3. You may default to a view where you see the Print/Export Statement link, or you may need to select your "Print/Export Statements" view from the **View** drop-down list.
4. Click the Print/Export Statement hyperlink.



5. Click the **Click here to export this sheet's data to PDF** link.

You will see the following prompt while the statement is exporting:

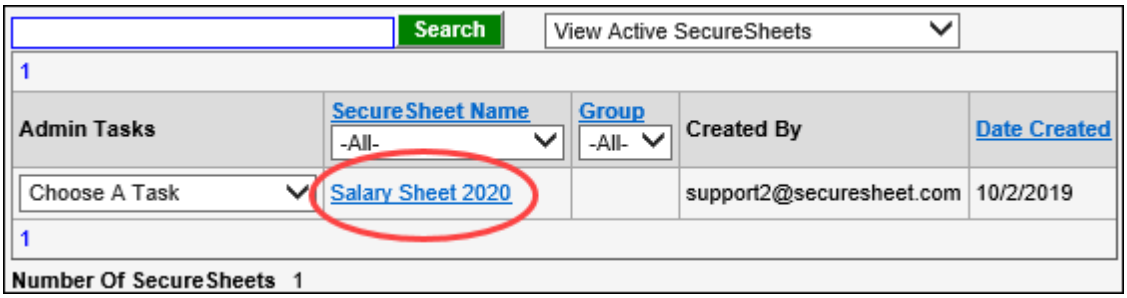


6. When the sheet has exported, select options from the pop-up in your browser to save or open the exported statement.
7. After you have exported, click **Close Window** to return to SecureSheet.

8. To export more statements, repeat steps 4 – 7. If you are done working with SecureSheet, click Log Out (top right corner).

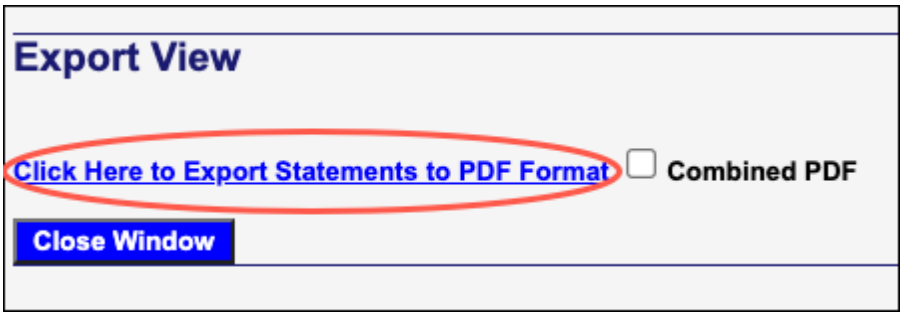
Printing/Exporting Statements In Batch

1. Login to SecureSheet.
2. Click the SecureSheet listed on your home page.



3. You may default to a view where you see the Print Statement link (to the left of your data), or follow instructions from your organization.
4. Click the **Export View** link at the top of the page.

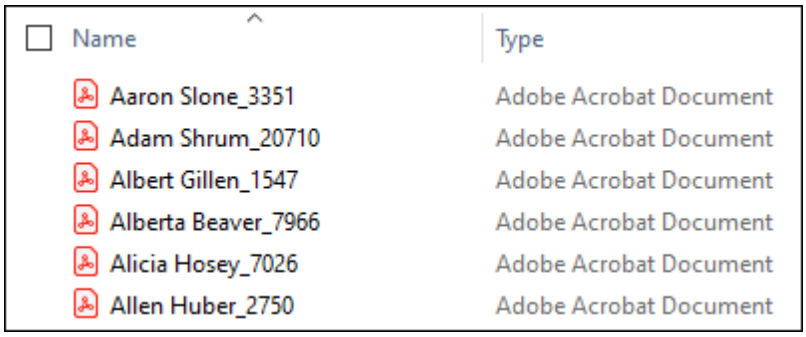
   - If you have over 500 statements to export, consider exporting in batches up to 250 rows at a time. If you choose to export a large batch, it will take several minutes for the export to complete (2 - 3 seconds per statement as a benchmark).
     - If you have a large group to export, you may filter the rows in your view first (e.g., by using the filter on the manager or department column).
     - You may use the Search box to narrow the rows to a manageable number before exporting the batch. For example:
       - In the Search box, type **ROWS(12-250), click Search, click Export View**; then type **ROWS(251-500), click Search, click Export View**.
5. Click the **Click here to Export Statements to PDF Format** link.



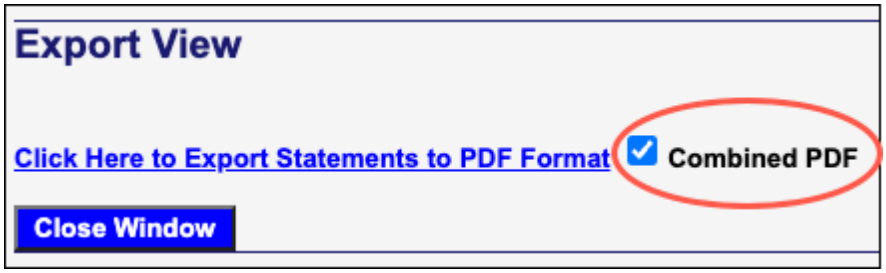
6. You will see the following prompt while the statement zip file is exporting:

7. When the batch has exported to a zip file, select options from the pop-up in your browser to save or open the exported statement zip file.

   NOTE: If you open the zip file, you will see the individual PDF files for each of your employees.



NOTE: If you select the **Combined PDF** checkbox, the statements will export into a single zipped PDF file, not an individual PDF file for each of your employees.



8. After you have exported statements, click **Close Window** to return to SecureSheet.

9. When you are done working with SecureSheet, click Log Out (top right corner).

Impersonate Other Users - for End Users

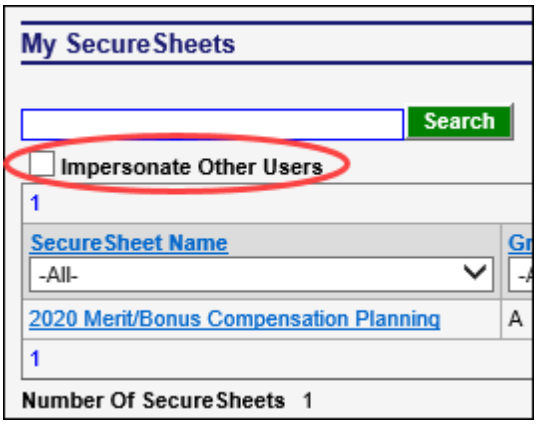
When you have an employee(s) who need to assist with data entry for another team member, you may set up an Impersonation List to allow an employee to act on behalf of another. An impersonator may be set up to impersonate more than one user. The employee(s) set up as impersonators will have the same permissions as the user(s) they have been given permission to impersonate.

> **NOTE:** When you login as an impersonator, every data value change you make on behalf of anyone you are impersonating is tracked in the SecureSheet audit trail as you impersonating that user, with the exact changes you make in each cell on their behalf.

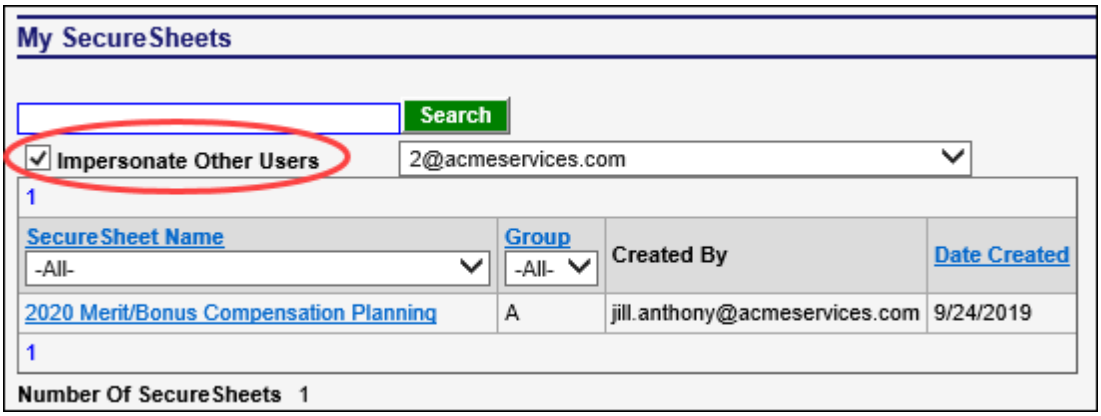
Video: Impersonating a User

Impersonating Another User

1. Login to SecureSheet.
2. When you have been set up as an Impersonator, you will see the **Impersonate Other Users** check box on your SecureSheet home page.

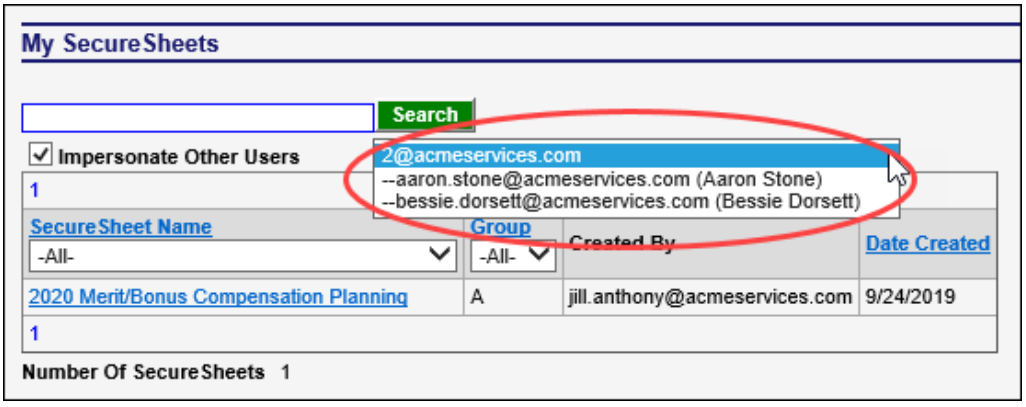


3. Check the **Impersonate Other Users** check box. A drop-down list will appear with your email address in it.



4. Select the user that you want to impersonate from the drop-down list. The drop-down list will contain the user(s) you have been given permission to impersonate.

   NOTE: You can only impersonate one user at a time.



   NOTE: When you are impersonating another user, you will see who you are impersonating in the upper right of your browser window beneath the SecureSheet navigation.

5. Navigate through the user's Views and enter data on their behalf as needed. You have the exact same security set up in SecureSheet for the user(s) that you have been set up to impersonate. When you are impersonating them, you see exactly what they would see when they login.
6. Log out of SecureSheet when you are done impersonating.

NOTE: You do not need to log out of SecureSheet to impersonate another user. Click **<<Go Back** or **Home** in the upper right naviagation of your SecureSheet window to return to your SecureSheet Home page and select another user to impersonate.

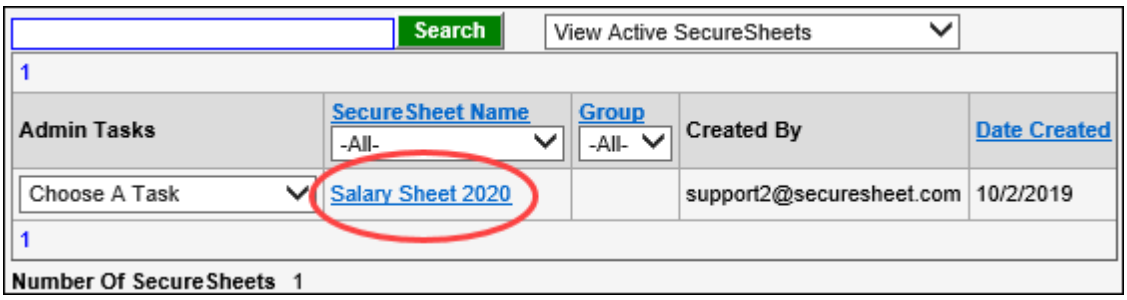
Export a View

SecureSheet has an export feature that makes it simple for end users to work with their data offline; this is a convenient option for managers with a large organization to review, or traveling where there is intermittent internet access, for example.

NOTE: Typically, managers who export their data are not given permission to import updates. Your organization will advise on importing updates to SecureSheet (e.g., as a manager, you may input updates when you are back online or a designated team member may assist, or you may be give permission to import values).

Export a View

1. Login to SecureSheet.
2. Click the SecureSheet listed on your home page.

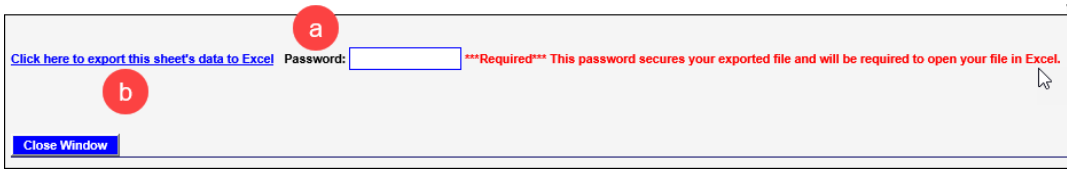


3. You will see (one of) the Views you have permission to use in SecureSheet.

4. Click **Export View**.

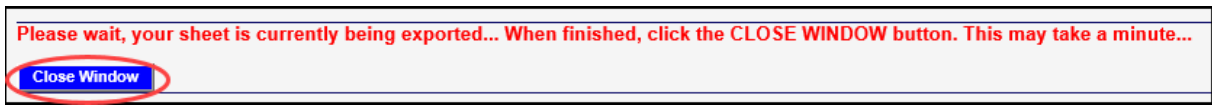
NOTE: If you want your exported Excel file to be in a specific sort order, sort it before you export the view. When a file is exported to excel from a view, sort is not enabled. However the data is sorted when it is exported is the sort order for the exported file and it cannot be modified.

5. On the Export View screen:
   a. Enter a **Password** for your exported file if passwords are required on export. Remember what you entered.
   b. Click the **'Click here to export this sheet's data to Excel'** link.



You will see the following prompt while the sheet is exporting:

6. When the sheet has exported, if you entered a password when exporting, the password pop-up will open in Excel. Enter your password to open the file in Excel. If you did not enter a password, your exported file will open directly in Excel.
7. After you have exported, click **Close Window** to return to SecureSheet.



8. If you are done working with SecureSheet, click Log Out (top right corner):

9. Make changes to the exported Excel file, and follow the process defined by your organization to import your updates to SecureSheet.

Import Values by View

If you have worked with an Exported SecureSheet file in Excel, and you have permission to import values into SecureSheet, you may follow these steps to import values using the **Import Values by View** import tool.

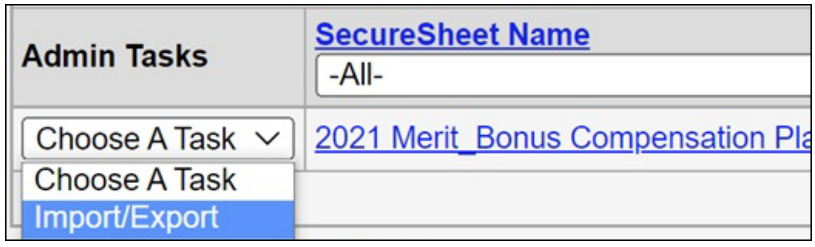
Notes about exporting then importing values into SecureSheet:

- SecureSheet validates that the column letters, column order, and column headers line up exactly between the SecureSheet structure and in the import file; this is why it is recommended to export from SecureSheet first to get your starting file for updates.
- If you need other filters in the view to help narrow the export, talk to a SecureSheet administrator in your organization to make those columns visible.
- If you happen to unhide the columns in the exported Excel file that are hidden, they are empty, but they are there for positioning the import, so do not delete them or your import will fail.
- After you import values by view, you may refer to the audit activity to see the details of your value import(s) at any time.

Video: Import Values by View

Import Values by View

1. Login to SecureSheet.
2. Select **Import/Export** from the Admin Tasks drop-down.

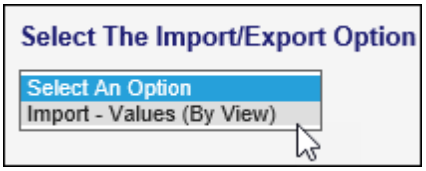


OR

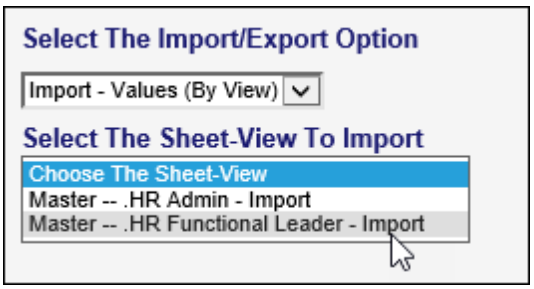
Click the SecureSheet listed on your home page and click the **Import – Values (By View)** link.

NOTE: The Admin Tasks menu drop-down and link are only available if you have been given permission to Import Values by View.

3. Select **Import – Values (By View)** from the drop-down.

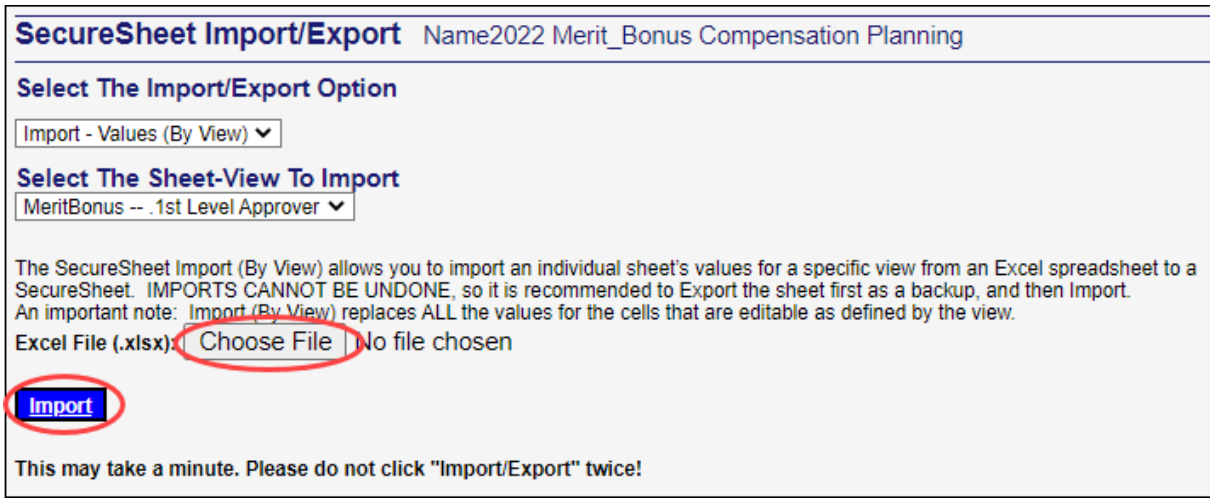


4. Select the Sheet and the respective view you want to import values to from the **Select The Sheet-View to Import** drop-down.

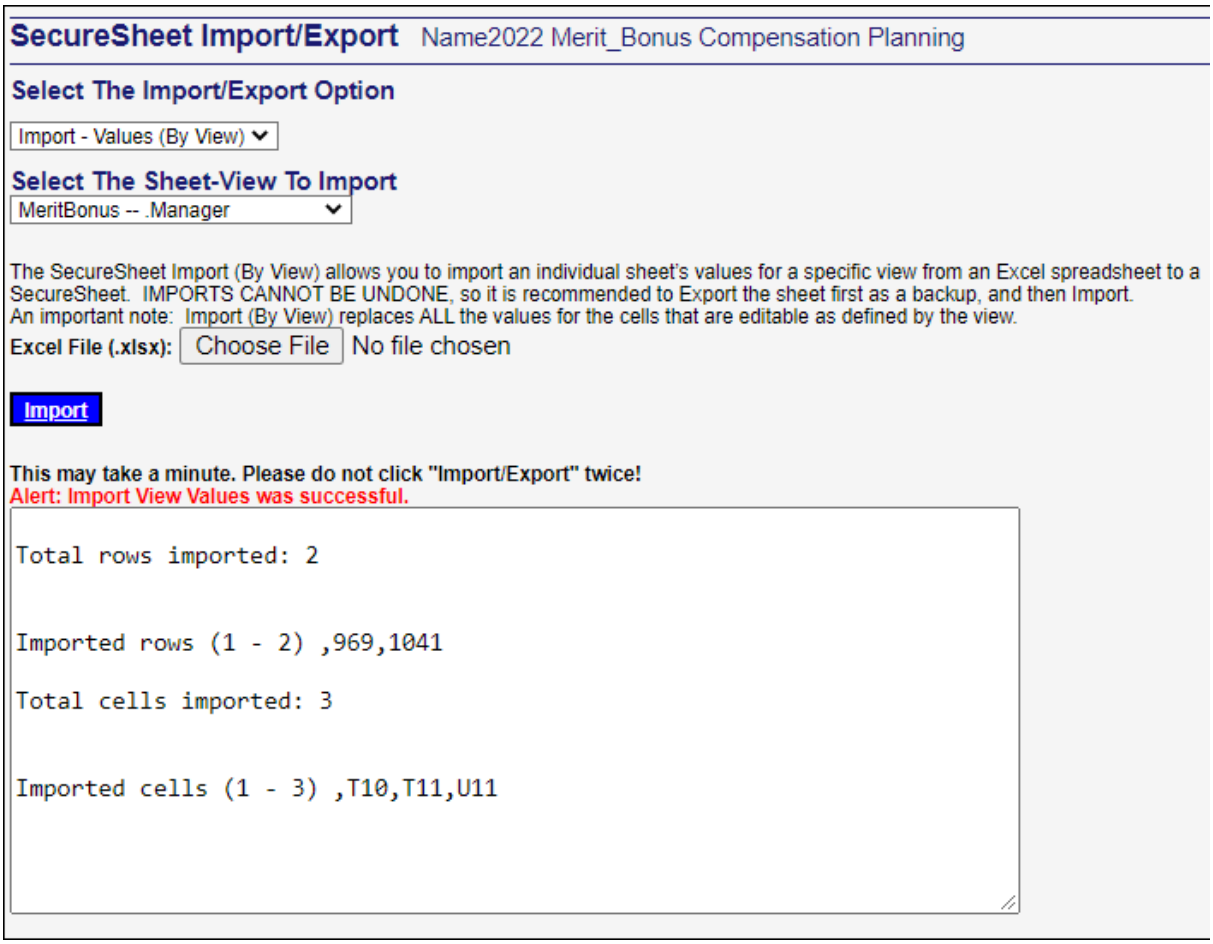


5. Browse for the file you want to import by clicking **Choose File**, select the file, and click **Import**.

NOTE: If the file you are importing is password-protected, remove the password protection **before** importing the file. You will see an error message telling you to do the same if you try to import a password-protected file.



6. When the import completes successfully, you will receive a confirmation message with the updated values status.

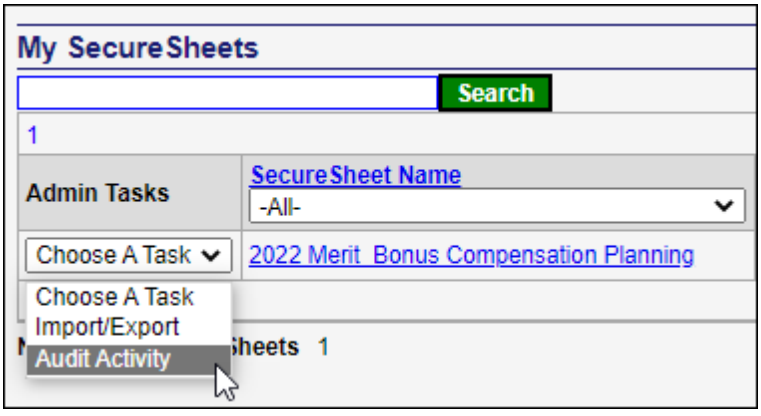


7. Click 

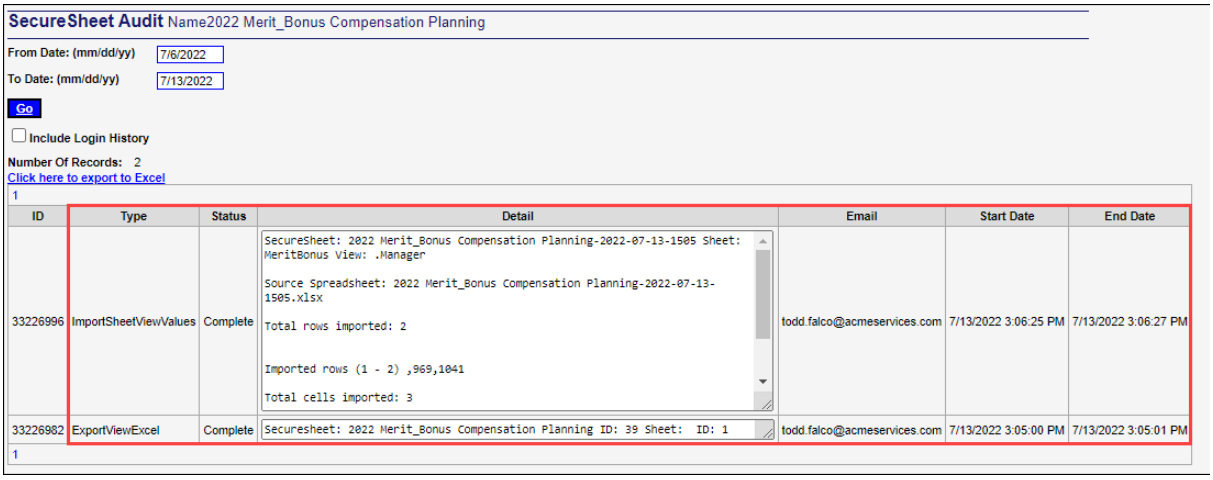
to return to working in SecureSheet.

Auditing your Import Activity

1. Login to SecureSheet.
2. Select **Audit Activity** from the Admin Tasks drop-down.



3. Adjust the dates for the activity you want to see as needed and click **Go**.



4. Click 

to return to working in SecureSheet.

Administrator Processes and Tasks

As a SecureSheet administrator, it is helpful to learn the how SecureSheet is set-up and to perform as many of the tasks as possible so you can effectively support your organization. Quick reference task lists are provided here for each of the major processes an administrator performs or supports in SecureSheet.

To view a recorded live demonstration of SecureSheet, click here.

Be sure to check out the videos for administrators which cover some common administrator tasks.

Quick Start

This quick start checklist guides you through the help topics so that you can get an overview of SecureSheet and also get started with the tasks required to create a working model of your spreadsheet as a SecureSheet, identifying your users, their views of the data, and the security needed to support your compensation planning process.

- Learn about your organization's SecureSheet site
- Format your Excel File for SecureSheet
- Upload your Excel File to SecureSheet File Attachments
- Design views and identify users for your SecureSheet
- Learn to export from and import to SecureSheet

Testing

Once your implementation is in process, you can start testing your end user views and making tweaks to columns that are locked, unlocked, or hidden from end users in each view. This checklist is a quick reference to the tasks you can perform while testing and tweaking your SecureSheet working model.

- Learn how to navigate in SecureSheet
- Impersonate users for Admin Testing

- Test Users and Views
- Set up impersonation for end users
- Adjust locked, unlocked and hidden column settings in a view
- Set maximum rows and columns in a view

Manage Users and Sharing

After your users are initially shared to SecureSheet, there may be some adjustments to their views, or addition of users while testing and during and after go-live. This checklist is a quick reference managing your users and their sharing permissions in SecureSheet.

- Set up Users-Views
- Adding User(s) for the first time
- Updating the sharing profile for a group of users
- Updating the sharing profile for an individual user
- Adding a new user to the users tab
- Lock views from users

Setting Up Statements

At the end of your cycle, you may produce a compensation statement for each employee in the organization. This checklist is a quick reference for statement set up and printing.

- Statement column mapping and scenarios
- Design a statement tab and modify the default view
- Set up statement logic on the main SecureSheet tab
- Set up views for end users to export statements
- Test statement scenarios offline
- Printing/Exporting statements

Go-live

When you are close to opening up your sheet for end user input, there are a few steps to make sure your data is clean from any testing, and that you are ready to audit the activity once your SecureSheet is live.

- Follow these steps for go-live
- Unhide your SecureSheet
- Learn about auditing SecureSheet activity
- Audit cell change history in SecureSheet

Data Maintenance

Data changes as fast as you pull it. There are many tools in SecureSheet that allow you to administer data changes directly in SecureSheet.

- Maintain a live SecureSheet

- Update data values in a column
- Add new rows to SecureSheet
- Modify a data validation
- Work with Data Validations
- Update Header Row Formulas Online
- Insert a tab
- Change the name of a tab
- Copy a tab
- Move a tab
- Delete a tab

Formatting Changes

If you have to make changes to cells once your SecureSheet working model is well in progress or your SecureSheet is live with end users accessing it, use the Administration tools in SecureSheet when you can versus locking, exporting and importing changes to your entire sheet.

- Adjust a column width
- Change a cell format
- Merge or unmerge cells
- Protect cells
- Insert a column into a SecureSheet

Working with Views and Filtering

It is helpful to understand how view filters work with user security so that you know what to expect in each view in your SecureSheet. The initial design is identified in your Users-Views SecureSheet, and additional views can be created as needed to support your users or your administrative functions.

- Add, edit, copy or delete a view
- The properties of a view
- Special SecureSheet filters for views

Videos for Administrators

To view a recorded live demonstration of SecureSheet, click here.

Click on a link below to access a video demonstrating a common SecureSheet administrator task:

Navigate in SecureSheet

- Navigate SecureSheet

SecureSheet Setup

- Set Up Excel for SecureSheet Considerations Part 1
- Set Up Excel for SecureSheet Considerations Part 2
- Set Up Excel for SecureSheet Considerations Part 3

- Design views and identify users for your SecureSheet

Data Management

- Export from SecureSheet
- Import to SecureSheet
- Add New Row(s) to an Active SecureSheet
- Import Values by View

View Management

- Standard Administrator Views in a SecureSheet
- Adjust Column Settings in Views

Manage Users and Sharing

- Run the Verify User Views Report
- Add users to sharing for the first time
- Update sharing for an individual
- Adding new user(s) using the Copy/Add All Sheets tool
- Locking Views Using a Lock Date and Time (on a View)
- Lock Each User with a Lock Date (on the Users tab)
- Set Up Impersonation List
- Impersonating a User for End Users
- Refresh Sharing

Formatting a SecureSheet Online

- Insert or Delete Columns
- Adjust Column Width
- Format Cells
- Protect Cells
- Merge and Unmerge Cells

Statements

- Export Statements
- Set Up Existing Views to Export Statements
- Create Views to Export Statements

Audit in SecureSheet

- SecureSheet-Specific Audit
- SecureSheet Site Audit

Email the SecureSheet Support Team if you have any questions or need further assistance.

Set Up Excel for SecureSheet

Your Excel file is the source for the structure that becomes your SecureSheet. All the properties in Excel, like values, formulas, formats, data validations, conditional formats, named ranges, and merged cells, are decided and maintained by you in your compensation spreadsheet.

To get started, focus on the structure of your main worksheet, i.e., all the columns you need are identified in the sheet. Recognizing the data will be dynamic through the process, you may start working with last year's data or a sample set of data.

To download an example spreadsheet modeled in Excel with SecureSheet setup considerations, click here.

Video Resources:

- Set Up Excel for SecureSheet Considerations Part 1
- Set Up Excel for SecureSheet Considerations Part 2
- Set Up Excel for SecureSheet Considerations Part 3

Setting Up Excel File for SecureSheet

Before the SecureSheet Support Team creates a SecureSheet from your Excel file, complete a few steps to prepare your Excel file for SecureSheet.

Complete these steps before uploading your Excel file to File Attachments:

1. Insert 5 columns to the left of your main worksheet.
    - SecureSheet "reserves" these columns for implementing statements and setting up export links for individual statements, for example.
    - SecureSheet uses Column A for Unique ID. This is used to keep audit history for each row in the sheet. It is also used in the data management process for importing values only to the sheet.
        - Column A is generally set to equal the EEID column. There are rules that apply if leading zeros exist in the EEIDs:
            - Column A should always be formatted as "General".
            - Column A should never be formatted "Text".
            - Typically, the Unique ID is the EEID column, and Column A is setup as a formula, e.g., **=F11*1** to remove any leading zeros in the EEIDs.
                - If removing leading zeros from EEIDs does not make Column A unique, concatentate columns from your data to make Column A a unique ID.
                - There can be no duplicate values in Column A.
2. Go 25 columns to the right of your last data column and type "End". This sets up additional columns that may be used for security or statement setup.
    - SecureSheet "reserves" these columns for implementing more advanced filtering and locking logic if needed in the views.

- When your SecureSheet is initially created, the last three columns will be system-generated columns that audit row changes. They will always be at the end of the data set after the last column in the sheet.

3. In the first row of any extra column to the right of your data, enter this syntax: **vexit/recalc/Recalc**. This will display as a Recalc hyperlink in the cell.
   - When you import to SecureSheet, SecureSheet recalculates based on what you imported. However, on occasion, the SecureSheet Support Team may ask that you recalc and this is an easy way to do that.

Excel Set Up Considerations

For security setup and data management:

- If not already present in your spreadsheet, add an **Employee Status** column to track employee status changes.
  - The employee status column allows you to manage status changes after go-live and preserve the audit trail throughout your process.
  - After go-live, you do not want to delete employee rows and reimport data or you will lose the cell history of the SecureSheet.
    - The number of rows must stay the same after go-live. Row order must also stay the same unless you request that a resort of data and reimport (still same number of rows, just resorted) tracks cell history tied to the Unique ID.

- Add a column to **track employee eligibility** for each compensation component you are planning in your model.
  - Add an eligiblity column (yes/no) at the start of each section, e.g., the merit section, the bonus section, and the equity section. This allows users to easily filter, and logic may be setup to lock the input column(s) for the section(s) that don't apply to each employee.
    - For example, an employee is eligible for merit and neither bonus nor equity. In your SecureSheet setup, the merit planning input columns will be unlocked for the employee and bonus and equity planning input columns will be locked.

- Is your **organization hierarchy** direct between employee and manager from first level to highest level leader?
  - With a direct hierarchy, SecureSheet can infer the organization hierarchy as long as each manager also has an employee row in the data (even if at the highest level if you desire, they are just identified as an employee with a manager with no compensation data included).
    - Even if your hierarchy may be inferred, build out the hierarchy by level so your end users may filter by level in their view(s).
  - With an indirect hierarchy, or a more complicated hierarchical setup in your organization:
    - Security may be controlled by a user's EEID being found on a row of data.
    - The hierarchy should include an EEID column next to a name column for each level in the hierarchy (e.g., Level 2 EEID in one column and Level 2 Name in an adjacent column). It is a better practice to setup security using EEIDs than names.
  - If the hierarchy skips levels, make it realistic, i.e., do not fill in the same name in levels 1 through 5 (or up to top of chain); where the hierarchy skips, leave the level blank.

- How do your **human resource team** members access data?
    - Security may be set to cross reference a value in a particular column or any combination of values in any of the columns in your main tab (e.g., by location and functional area).
    - If you identify your human resource team members on each employee row, include a column with their EEID as well (e.g., HR EEID in one column and HR Name in an adjacent column).
    - You may have a hierarchy of HR team members or more than one HR team member who needs access to the same data. If more than one human resource team member needs to be identified on each row, add as many sets of HR EEID and HR Name columns as needed.
        - If this is your scenario, also add a column that concatenates all of the HR EEIDs. This concatenated HR EEID column will be used as the security cross reference to show the appropriate rows to the human resource team members. (Note: this approach is not limited to human resources; it can be used for any combination of manager/leader IDs if needed).

For process tracking:

- If you want managers to acknowledge they have completed their recommendations, consider adding a "Submitted" column to your Excel file, e.g., " **Planner Submitted**" with a dropdown value "**Submitted**".
- If you want approving managers to acknowledge their approval, consider adding an "Approved" column to your Excel file for each level of approval in your process, e.g., " **First Level Approved**", "**Second Level Approved**", etc., each column with a dropdown value "**Approved**".
    - SecureSheet Support will add a "Submit All" and "Approve All" link above each column so planners may submit/approve all at once or by row.

For data entry:

- Do you allow planners to enter a percentage OR an amount?
    - If you allow planners to enter either a percentage or an amount, consider using helper columns to build out the data validation that allows one or the other, not both. Note that there are may ways to accomplish this in Excel and this is one approach.
    - If you have range guidelines, you may also build in data validation controls to check if an entered value is over/under the range.

- Do you have employees in multiple countries?
    - If you show the base pay/amount(s) awarded in local currency, build in the following columns:
        - Country
        - Currency
        - Pay information in local currency
        - Pay information in budgeted/planning currency

- If you have a dependent data validation (i.e., the drop down values in one column are based on the value in another column or series of columns), be sure to set up the dependent data

validation following the SecureSheet instructions for setting up a dependent dropdown.

For summary data:

- Summary calculations should be in the header rows at the top of your sheet (e.g., budget runners or counters if you want them).
- If you have more extensive summary information that you would like to include in SecureSheet, note that SecureSheet does not support pivot tables; however, any pivot table can be translated into formulas.
    - You may build out summary data tables as formulas as needed, either on your main tab in header rows, or on a supporting tab, and import them into SecureSheet. The SecureSheet Support Team will help you build views of summary data based on user security as needed.
    - If you have charts, build them in Excel as you would want to see them in SecureSheet.

For less troubleshooting and consistency when your Excel file becomes a SecureSheet, consider the following:

- Move all **summary calculations** to header rows at the top of your main sheet. SecureSheet will dynamically calculate summary totals in a view for each user based on the rows displayed for the user in the view.
    - Header rows can be hidden per view in SecureSheet.
    - Place summary calculations that need to be visible to end users above columns that will not be hidden in the end user views.
    - Extend header formula ranges beyond the last row of data to accommodate adding additional rows of data through the process (e.g., if the total rows in a sheet is 100 and the last row referenced in a discrete range is 1000, SecureSheet will automatically ignore rows 101:1000).
- When building **VLOOKUPs** that reference a supporting tab, use absolute ranges in your lookup formula, e.g., C5:E60 vs C:E.
- If you use **Named Ranges** in your Excel model, give them absolute cell references, e.g., G10:J500, not relative like G:J.
- **Copy formulas** all the way down columns in your data.
    - As a best practice, use formulas consistently on all data rows; do not have formulas on some rows and values in other rows in the same column.
- Check **column data types** to make sure they are consistently applied to the entire column.
  NOTE: TEXT formatted columns cannot be used in calculations in SecureSheet.
- SecureSheet does not import any data formatted as a table in excel (pivot or otherwise). Remove or rearchitect table formatting/references.
- Make **fonts** consistent (name and size).
- **Align** number and date columns to the right or left consistently.
- Manage **column widths** (adjust for length of data values in the column; wrap headers if necessary).
- **Shade** user input columns for visual cue (e.g., light yellow).
- Unhide all supporting tabs.
- Unhide all columns and rows.

- UnGroup any grouped data.
- **Remove cell borders** from main data rows.
    - If desired, border summary data in the header rows.
    - Grid Lines is a property in SecureSheet that can be used to delineate cells.

NOTE: There are 250 maximum columns allowed in a SecureSheet (the last three columns are reserved as the SecureSheet audit columns).

Action

- When you have your Excel structure confirmed and have reviewed and applied these considerations, upload your Excel file to File Attachments and email the SecureSheet support team that it is there.

Set Up Users-Views

A Users-Views SecureSheet is set up and managed for each SecureSheet project. This file contains two tabs, a Users tab and a Views tab. You will fill in the Users-Views information to get an initial view design set-up for the initial model in SecureSheet, and identify the users who will need access to data in SecureSheet. The two main tasks you will perform are:

1. Design the **Views** of the data in your SecureSheet – set the columns that you want to show to your users and whether they will be able to update data in the columns, or will they be hidden from users.
    - For example, you may have a manager view that allows annual merit recommendation amounts or percentages. We would create a Manager view and share it with your users who need to enter that data. You may also have a next level approver who approves the recommendation and who can also enter bonus information that the managers cannot add. We would create a Next Level Approver view that allows them to override data entered by the managers and also enter bonus information.
2. Identify the **Users** who will be accessing SecureSheet and what view(s) of the data they will need to see in the SecureSheet.
    - For example, you may have a manager who needs to enter data for their employees in an annual merit cycle. That same manager may also be a next level leader who needs to approve data across their organization that was entered by their direct reports.

To access an example Users-Views file, click here.
To see a video covering users and views set up, click here.

Views

- **Views** are often synonymous with roles your users play in the organization. Each View design can show different columns, and columns can be hidden depending on what is necessary to show the users in each view. Columns can also be locked or unlocked based on user data entry requirements.
- Standard administration views will be created for on-going data management - **All Data (Edit)**, **All Data (View Only)**, **All Data (Recent and History)**, and **Add New Row(s)** - that are for SecureSheet

administrators (unless purposely permissioned to non-administrators). Other views could include Direct Reports, Rollup, Approver 1, Approver 2, HRBP, etc.

- Views, combined with security, set up what rows of data return for Users who allowed to see each view that you share with them.

Users

- **Users** are every end user who has permission to access data in the SecureSheet based on their email address at login and the views they need to access. User data includes: Employee ID, name and email address.
- A user group may be identified to make it easy to grab a list of emails for communications through your planning cycle, e.g., managers, Approver 1, HRBP, etc.
- Values from columns in your main data that indicate the data an user should see in a view. For example, a location value may be used to filter the employees that an HRBP sees in their specific HRBP View in SecureSheet. Any combination of values across any columns may be combined to identify access to data for any of your users.
- Views that each user will be given permission to see in SecureSheet.

Before you begin setting up Users-Views:

- Have your compensation Excel file column structure close to finalized (i.e., placeholder columns in sections where you might anticipate adding-in columns if needed).
- Ensure your Excel file headers are copied into the Views tab (either you or your SecureSheet Support contact may do this task).

Export the Users-Views SecureSheet

1. Login to SecureSheet.
2. On your My SecureSheets home page, select Import/Export from the **Admin Tasks** drop-down to export the **Users-Views** SecureSheet. You do this so that you can work with the file in Excel.

Designing Views

Design the settings for each column in each end user view - view only (locked), editable (unlocked), or hidden (hidden). Specify columns that you desire to be filtered.

1. Open the exported Users-Views Excel file. Click the **Views** tab. The initial list of Views may be overwritten.
   NOTE: The column settings on the standard administration views do not need to be adjusted.
2. Confirm the name and descriptors for each View (Columns A, B, C).
3. For each column in each View, select a value from the drop-down indicating the column setting as UnLocked, Locked, Hidden. These are defined as:
   - **Locked** – column is visible and not able to be updated by users; columns with formulas should be locked (or if you allow users to override columns, share that with the SecureSheet Supoprt team)
   - **UnLocked** – column visible and able to be updated by users
   - **Hidden** – column is not be visible to users
4. Enter an ‘x’ for each column Filter/Sort setting.

NOTE: If you do not identify, sort will be turned on for each column, and the SecureSheet Support team will set filters on demographic data and any non-calculated columns. You may alter filter settings in views throughout testing.

Considerations:

- If all users on a particular view will filter the same way, like using the value in the manager ID column, identify the Manager ID column in Column C on the Views tab.
- If each user needs to filter on different value(s) in a specific column in the same view, like a specific location name or a combination of location name and department name, identify each user's specific value(s) on their row in the yellow column section of the **Users** tab.
- IF you have dependent dropdown(s) functioning in your Excel model, the dependent column(s) must be visibe in each end user view where they are expected to work (otherwise SecureSheet won't know what the list is dependent on).

Identifying Users

Users are anyone in your organization who will access the SecureSheet. Every user must be set up on the Users tab for User security cross-referencing in SecureSheet at login.

1. In the Users-Views Excel file, click the **Users** tab.
2. In Columns A – C:
    - Fill-in the Employee information for each end user who will work with the SecureSheet.
    - Each user email **must be listed only once** in the Users tab.

    NOTE: Please do not change the order of the columns as you fill-in user information.
3. In Column D:
    - Identify a User Group. User Groups are optional. Identify them according to how you refer to your end users. For example, HR, Admin, Senior Leader, etc. This may make it easier to work with SecureSheet sharing and to communicate with groups of users later in the process.
4. In Columns J – L (and additional columns as needed):
    - Include data values that may be needed for securing access to the data in SecureSheet.
        - For example, in their HRBP view in SecureSheet, your HRBPs may access data based on location values that are stored in Column K on your main SecureSheet tab. If this is the case, on the Users tab in Column J, you would label it **Location (Col K)**, and identify the exact values from Column K - Location on your main data tab for each user who has Location-level security. Delimit multiple values by three asterisks: e.g., Chicago***New York***Philadelphia).
5. In Column S – list the end user views you designed on the **Views** tab:
    - List each View Name that you defined on the Views tab (in Column A) starting in Column S, and across as many columns as needed (i.e., the **Views They Need** section on the Users tab).
6. For each User, under the **Views They Need** section, select an 'x' from the drop-down if the user will need to have access to that View.

    NOTE: Remember, the View names listed on the Views tab should match the names of the views in the **Views They Need** section of this Users tab.

NEXT STEPS:

- When you have completed the Users-Views set-up, import your updates to your Users-Views

SecureSheet.

- Send an email to your SecureSheet Support contact to let them know you have refreshed the Users-Views file.

Test Users and Views

After the initial model is created in SecureSheet, administrator testing can begin. This is an iterative process where SecureSheet administrators test the set up by impersonating users - at least one for each security profile.

NOTES:

- Only SecureSheet administrators have the option to impersonate end users directly from the Admin Tasks drop-down list.
- Non- administrators may be setup to test - entering data on behalf of a user for testing purposes - by setting up an impersonation list.
  - If non-administrators need to participate in testing, the SecureSheet must be unhidden and in the **Active section** of the site for non-administrators to access it.

Test SecureSheet Set Up

1. Run the Verify User Views report to use in conjunction with impersonation testing.
2. Impersonate at least one user per security profile, and all unique user security profiles, and verify the following (as applicable to your SecureSheet setup):
   - **Views:** Locked, UnLocked, and Hidden columns are working as expected.
   - **Security:** User data is restricted per View as expected, i.e., only rows based on the user's security are being shown.
   - **Logic:** Calculations, data validations, conditional formats are working as expected.
   - **Summary Totals:** Updating accurately upon data entry.
   - **Employee Status:** Row status is filtering out as expected (e.g., inactive / terminated employees are not appearing in view(s)).
   - **Dynamic Row Locking:** Cells are being locked when ineligibility logic is applied to the row.
   - **Multi-level Approvals:** Status tracking and row locking is functioning as expected.
   - **Statements:** Pulling column values correctly from the main SecureSheet tab based on all scenarios built into (each) Statement.
3. Run the Verify Formulas process to confirm results in a calculated SecureSheet match the results in an Excel file that has been exported from SecureSheet.

Video Resources:

- Verify User Views

Verify User Views

When a SecureSheet is loaded, views are created, and users are shared to their respective views, it is time to confirm that the security is working as it should by filtering the correct rows in each view for each user. Use this report to verify resulting rows in each user's view(s) against your organization data/expected results for each user.

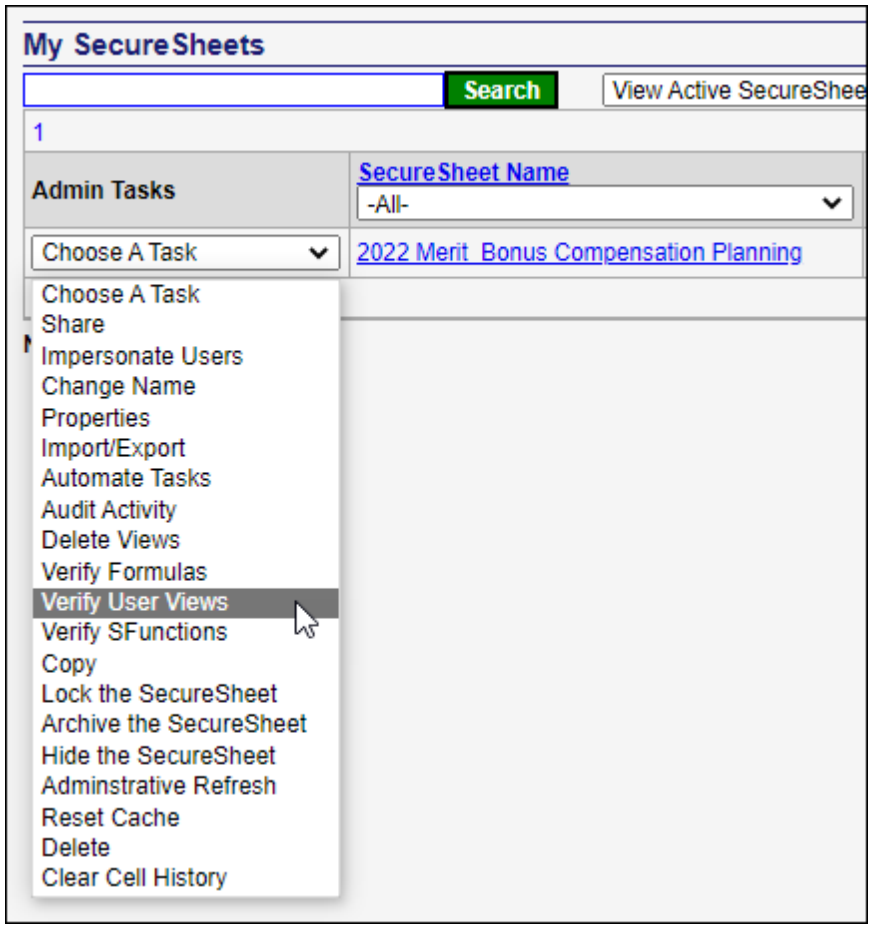
In conjunction with impersonation testing, SecureSheet has a Verify User Views report that contains the number of rows returning per user per view, as well as the security filter information and column settings for each view. This report allows you to verify rows returning for each user in each view that you have given them permission to access without having to impersonate every user.

You may also extend the functionality of the Verify User Views report to include key values from two columns in your SecureSheet. This will help you validate that the correct data is returning for users.

Video: Verify User Views

Verify User Views - Basic

1. Select **Verify User Views** from the **Admin Tasks** drop-down next to the SecureSheet you want to verify.



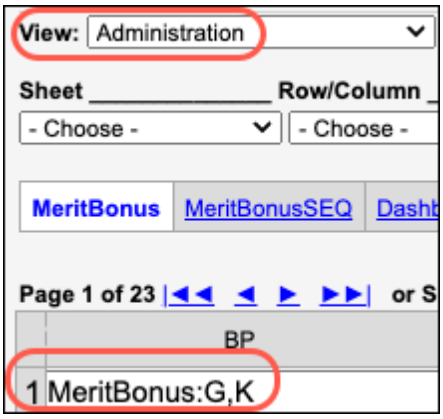
2. Click **Verify**. SecureSheet will run the report (this may take some time depending on the number of users and views).

3. When the report is ready, the **Click here to export the list to Excel** link will appear. Click to export the file.

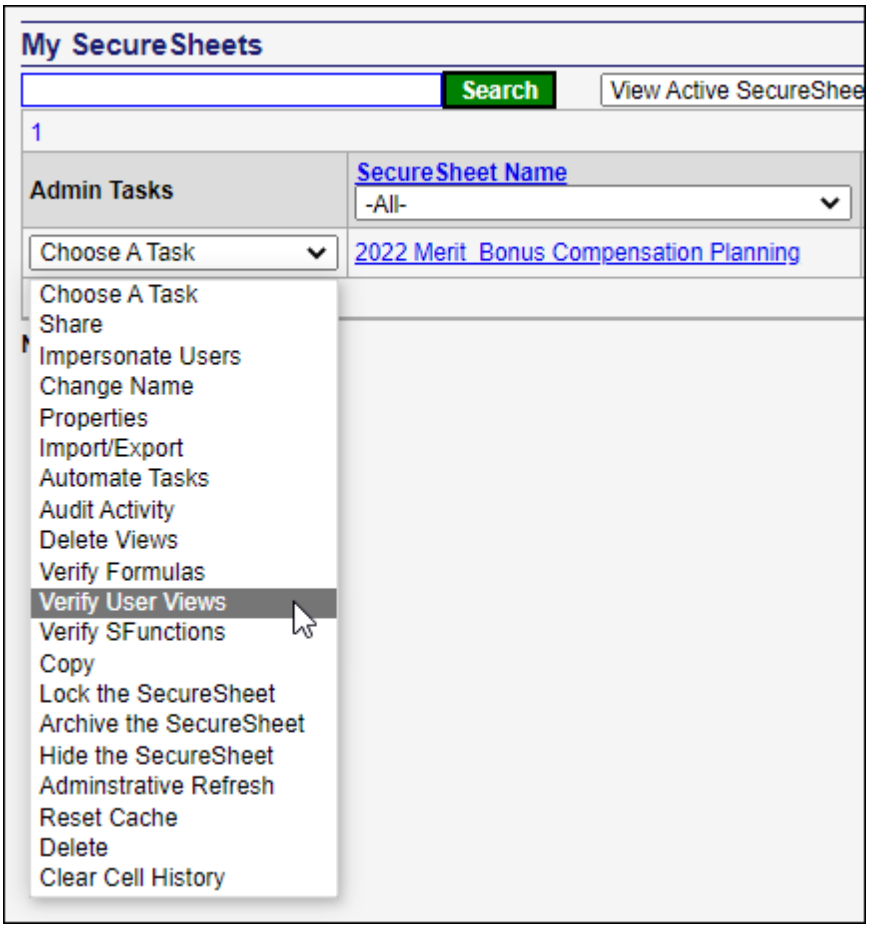
4. Open the report in Excel. Filter and sort the report as needed.
    - Filter on the main tab in Column A.
    - Filter out the Permission of "A" (for administrator) in Column C.
    - Filter to the names of your end user views in Column D (e.g., not "Letter1").
    - Use Column E contains the number of rows that return for each user in each view.
5. In SecureSheet, click **<<Go Back** to return to your SecureSheet Home Page.

Verify User Views - Extended

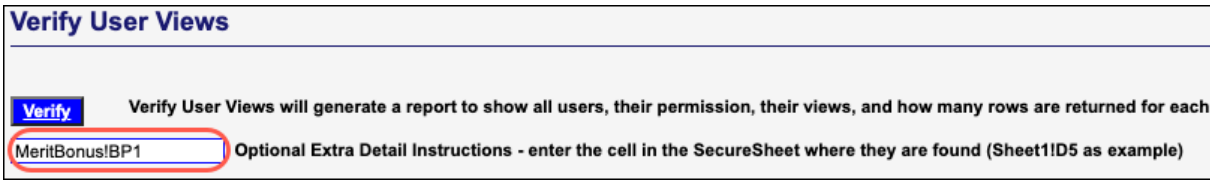
1. To set this up, in your main SecureSheet, goto the Administration view and add the following syntax to any cell on any tab that is not visible to your end users:
   MeritBonus:G,K
    - Where:
        - MeritBonus is the tab name of the main tab in your SecureSheet
        - G and K are the two columns that contain the key values you want to see for each user in the report
    - In this example, for each user in each view they are shared to on the MeritBonus tab, the values found in columns G and K on the MeritBonus tab will be added to the Key Value columns on the Verify User Views report.



2. To run the report, select **Verify User Views** from the **Admin Tasks** drop-down next to the SecureSheet you want to verify.

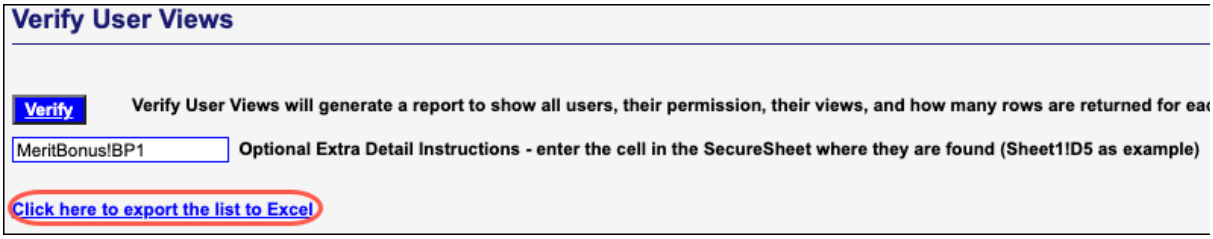


3. In the text box, enter the syntax that aligns with your tab name and the cell where you put the detailed instructions for the key value columns:



4. Click **Verify**. SecureSheet will run the report (this may take some time depending on the number of users and views).

5. When the report is ready, the **Click here to export the list to Excel** link will appear. Click to export the file.



6. Open the report in Excel. Filter and sort the report as needed.
   - Filter on the main tab in Column A.
   - Filter out the Permission of "A" (for administrator) in Column C.
   - Filter to the names of your end user views in Column D (e.g., not "Letter1").
   - Column E contains the number of rows that return for each user in each view.
   - Columns F and G show the key value columns that were reported and the resulting

values.

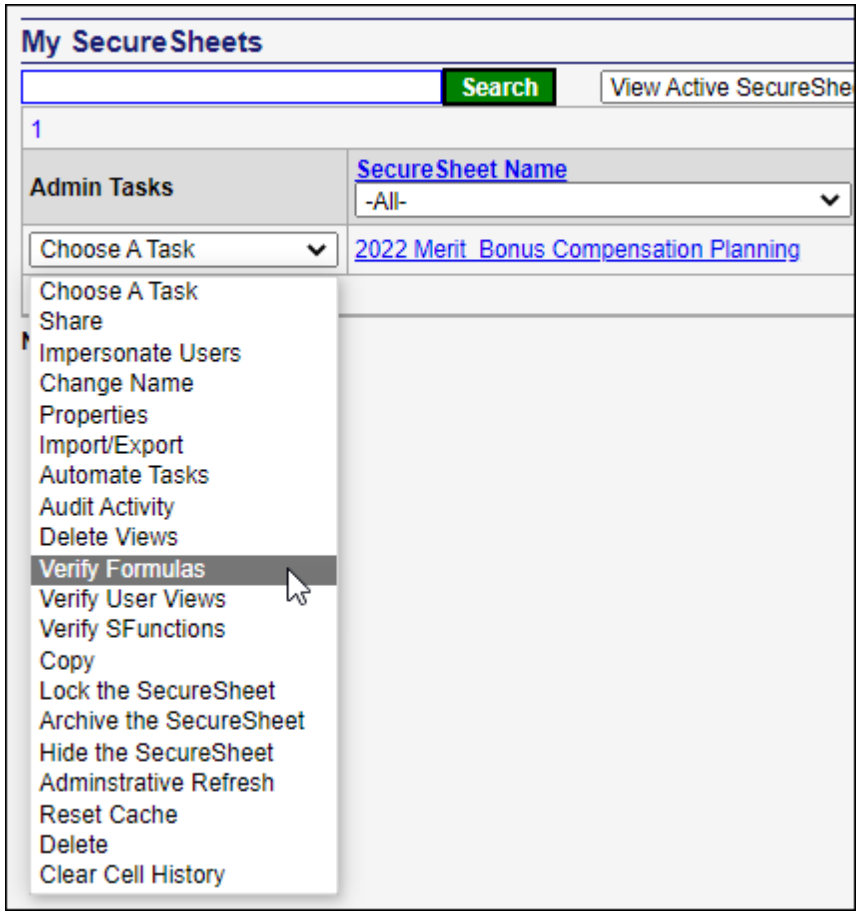
	A	B	C	D	E	F	
1	SHEET	EMAIL	PERMISSION	VIEW	NUMBER OF ROW	KeyColum	KeyValues
2	MeritBonus	allison.felton@acme.com	Update	.Direct Reports	19	G,K	G = Juan Hamann K = East // G = Craig Decarlo K = East // G = Martin Chrisman K = East // G = Ellen Albanese K = Ea
8	MeritBonus	erika.bettino@acme.com	Update	.Direct Reports	2	G,K	G = Gina Hernandez K = East // G = Natalie Turner K = East
18	MeritBonus	eugene.coe@acme.com	Update	.Direct Reports	10	G,K	G = Eva Hoch K = West // G = Richard Delong K = West // G = Amber Neel K = West // G = Sheri Countryman K = We
25	MeritBonus	gina.hernandez@acme.com	Update	.Direct Reports	3	G,K	G = Todd Falco K = East // G = Robert Boatwright K = South // G = Eugene Coe K = West
32	MeritBonus	jack.falkner@acme.com	Update	.Direct Reports	16	G,K	G = Cindy Brumley K = Midwest // G = Vincent Gallego K = Midwest // G = Juana Albrecht K = Midwest // G = Ralph
35	MeritBonus	john.jaworski@acme.com	Update	.Direct Reports	34	G,K	G = Jacob Caruthers K = East // G = Dennis Bowman K = South // G = Wendy Solberg K = South // G = Jane Hendrick
38	MeritBonus	jude.portelli@acme.com	Update	.HRBP	49	G,K	G = Jimmy Mcmulin K = East // G = Jack Watts K = East // G = Juan Hamann K = East // G = Craig Decarlo K = East //
40	MeritBonus	lainey.daniel@acme.com	Update	.HRBP	64	G,K	G = Ernest Stauffer K = South // G = Johnny Shay K = South // G = Stella Sherlock K = South // G = Jason Pina K = So

7. In SecureSheet, click **<<Go Back** to return to your SecureSheet Home Page.

Verify Formulas

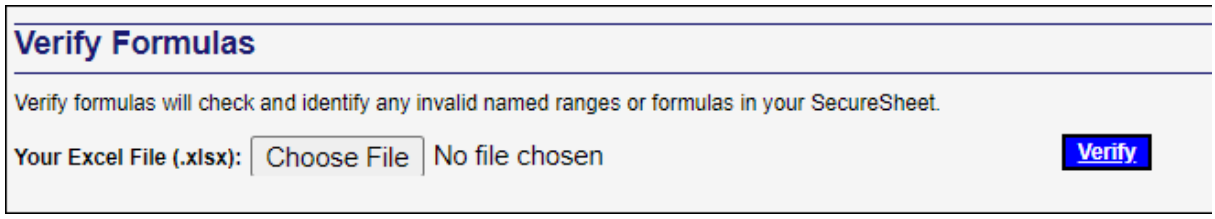
When a SecureSheet is initially created, it is a best practice to verify that the formulas from Excel that have been loaded into SecureSheet are resulting in the same values in both Excel and SecureSheet. The Verify Formulas tool is available to verify that the results in a calculated SecureSheet match the results in an Excel file exported from SecureSheet.

1. Recalc the SecureSheet by clicking the Recalc link on the main tab of your SecureSheet. If you do not have a Recalc link (typically in Row 1 to the right near the SecureSheet audit columns), you may add it to a "spare" cell that your end users will not see. Use this syntax for adding a Recalc link to any unused cell (that is hidden from end users): **vexit/recalc/Recalc**
2. Export your entire SecureSheet using the Export Values/Formulas/Formats tool.
3. Open your exported SecureSheet in Excel. Remove the password from the export file, save it, and close it.
4. In SecureSheet, select **Verify Formulas** from the **Admin Tasks** drop-down next to the SecureSheet whose formulas you want to verify.



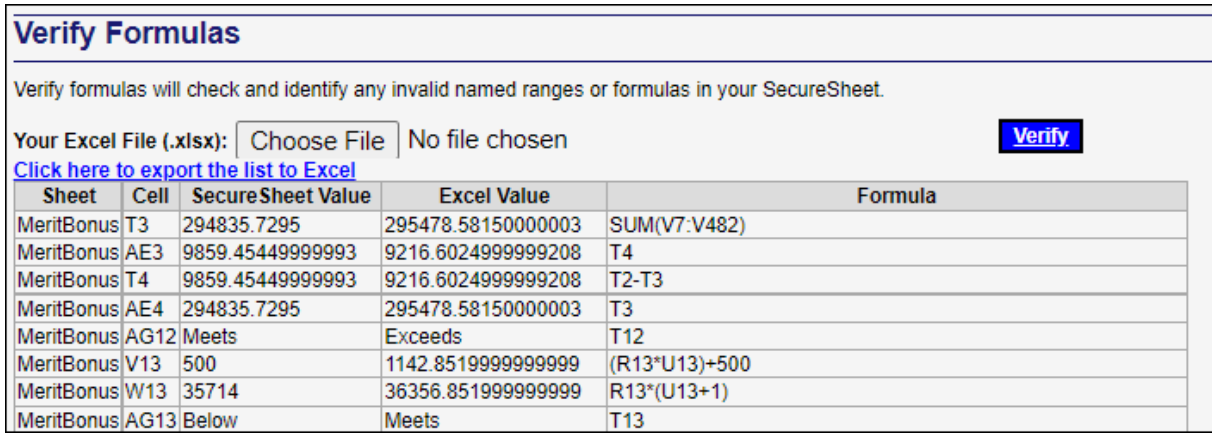
5. Click Choose File and browse to the exported SecureSheet in your file system, select it, then click

Verify.



6. Click **Verify**. SecureSheet will run the report (this may take some time depending on the number of users and views).

7. If there are no discrepancies between SecureSheet and Excel results in cells, you will get a message that results match. If there are discrepancies, you will see a listing that you can export. When the report is ready, the **Click here to export the list to Excel** link will appear. Click to export the file.



Sheet	Cell	SecureSheet Value	Excel Value	Formula
MeritBonus	T3	294835.7295	295478.58150000003	SUM(V7:V482)
MeritBonus	AE3	9859.45449999993	9216.6024999999208	T4
MeritBonus	T4	9859.45449999993	9216.6024999999208	T2-T3
MeritBonus	AE4	294835.7295	295478.58150000003	T3
MeritBonus	AG12	Meets	Exceeds	T12
MeritBonus	V13	500	1142.8519999999999	(R13*U13)+500
MeritBonus	W13	35714	36356.851999999999	R13*(U13+1)
MeritBonus	AG13	Below	Meets	T13

8. In SecureSheet, click **<<Go Back** to return to your SecureSheet Home Page.

If you have questions about resolving the discrepancies, contact the SecureSheet Support Team.

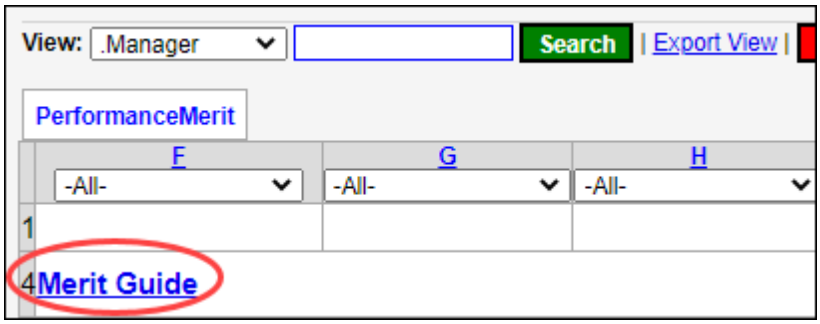
End User Instructions

End User Instructions

There are multiple approaches available to provide end user instructions. Use or combine any of the options to meet the needs of the users in your organization.

- Direct users to SecureSheet Help as their navigation guide.

- Provide user instructions in a PDF file that users can access through a link in your SecureSheet.
    - Use the SecureSheet Help documentation as a starting point for user-specific instructions - copy, paste, then modify with screen shots and process steps unique to your organization. The link can be placed in a header row on your planning tab, for example:



- To add a link to a pdf file of end user instructions:
  - Upload your user instructions PDF file to the files folder in File Attachments.
  - In whatever cell(s) you want the end user instructions link to appear for your end users, add this syntax to those cell/s:
    - sfile/folder name/file name in file attachments/text to display where:
      - folder name is the name of the folder in File Attachments where your user instructions file is stored,
      - file name in file attachments is the exact file name of your end user instructions pdf file that you have uploaded into the folder in file attachments (note: you may link to different instruction files by view if needed),
      - text to display is the text that will appear in the link. The link text is your choice.
        - For example: sfile/files/SecureSheetUserInstructions.pdf/See Merit Guide Online
          - This instruction file link will popup the instructions in another browser tab. If you download the file, it will have an .aspx.pdf file extension (or some other file type) when it is downloaded, and the file name will be from the file viewer in the browser (not the name of the file as it is stored in the Files folder in SecureSheet). You may go to your Downloads folder in the file system and rename the file to change the extension from .aspx.pdf to yourfilename.pdf.
        - For example: sfile/files/SecureSheetUserInstructions-Download.pdf/Download Merit Guide
          - If you want to give your users an option to download the instruction guide without having to change the name (and not have it popup in another browser tab), you may save your instruction file with the word "download" in it,

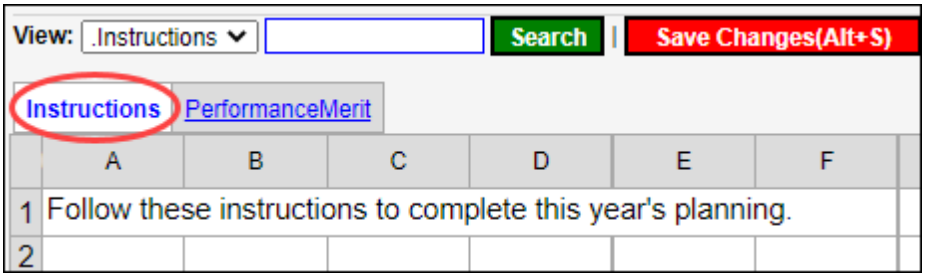
and the link will then download the instruction file without popping it up in a browser.

- **NOTE:** You may have two instruction files in the Files folder in File Attachments - one that is for accessing instructions online, and the other that is to download the instructions (without having to change the file name or type).

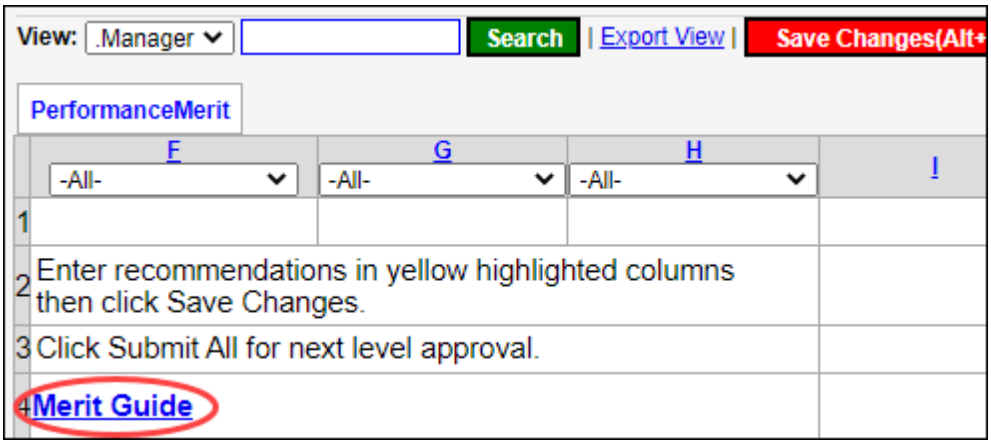
- If you have a different set of instructions based your different groups of users, you may provide different instructions per view in SecureSheet. If this is the scenario, instruction links may be added to different header rows (and hidden on views as needed) or they may be added using the Summary Calcs field on each view. Discuss your scenario with the SecureSheet Support Team as needed.

- Link to a portal/internal webpage in your organization.
  - In whatever cell(s) you want the link, use this syntax:
    - https://www.ourhrhelpportal/somethingelse/thislocationonline.aspx/DT=Click to access Compensation Guidance portal
      - where your internal online location address is first
      - and the text you want displayed for end users to click is next

- Add an Instructions tab to your main SecureSheet (named whatever you would like: e.g., Guidelines, Process, Instructions) and provide instructions there, for example:



- Use a few header rows to give targeted end user instructions, and include a link to a pdf file, for example:



Links to the Most Common End User Task Topics

Here are some links to the most common end user help topics that can be copied/pasted/exported to PDF and converted into word and customized with your own screen shots as needed for your end users:

- Login to SecureSheet
- Navigate in SecureSheet
- Search Tips
- Export to Excel
- Import Values by View
- FAQs (the first several questions on this list are just a different way of getting at the same information in the topics above but may be helpful)

Set Up a SecureSheet for Training Demos

If you are planning to roll-out SecureSheet by conducting online webinars for your end users, you may want to use demo data for this purpose. In order to do this, you can create a copy of your SecureSheet and import a demo data set to use for training.

Follow these steps after you have tested your SecureSheet set up and are confident that the security filters are working as you would expect. The SecureSheet Suppport team will only troubleshoot and support the set up of the SecureSheet that your end users will use in your live compensation cycle, so it is important that if you choose to make a training SecureSheet, you are at a point where there will be minimal changes to view set up and security.

Set Up a SecureSheet for Training Demos

1. For Users to use for training demos:
   A. Use Users from your current Users tab in your current Users-Views for training demos.
   OR
   B. Add Users to your current Users tab for training demos and share them to appropriate views your training demo SecureSheet.
2. Copy your main SecureSheet to a Demo SecureSheet.
3. Rename your Copied main SecureSheet.
4. Move your copied SecureSheet to the Hidden section of your site (accessible only by administrators).
5. Import the demo data into the Demo SecureSheet.
6. Impersonate your demo users to be sure it is working as you desire.
7. When you are ready to demo, move your SecureSheet to the Active section of your site.

> **NOTE:** If you decide to copy your Users-Views to create a demo-specific Users-Views SecureSheet, update the security filters across all of your end user views to the SecureSheet ID for the new Users tab.

Steps for Go-live

After SecureSheet testing is complete and you are confident that User security is working as you expect it to, prepare your final data before opening up SecureSheet to your end users.

> **NOTE:** The formulas in your Excel model must be finalized and loaded into SecureSheet at least five (5) business days before go-live.

Preparation for Go-Live

1. Run the Verify User Views report from the **Admin Tasks** drop-down on your SecureSheet Home Page.
    A. Verify that the number of rows that result in each view for each user are what is expected.
2. Impersonate one user from each of the security profiles you have set up for your users.
    A. Verify that the default view is what you expect.
3. Confirm sharing permissions are as expected in SecureSheet
    - Export Sharing from SecureSheet.
    - Review the Users tab in your **Users-Views** SecureSheet.
    - Ensure there are no duplicate emails in column A in your Users tab.
    - Update, add, or delete users as necessary.
4. Review summary calculations in your header rows to ensure that they cover all the data rows in the sheet.
    - You may extend the end range past your last row of data in case you add any employees after go-live. This way the calculations will already be set up to include added rows, and SecureSheet will ignore any rows past your last row of data.
5. Remove test data from your SecureSheet.
    A. As you tested, if you did not delete values you entered during testing, be sure user-entered value-based columns are clear of test data and ready for your users' input:
        i. Export your SecureSheet. Save a copy on your local system or network.
        ii. Open the file in Excel.
        iii. Remove any test data / refresh value-based columns as necessary.
        iv. Be mindful not to overwrite your formula columns - unless you have to update a formula at this point.
        v. If you allow users to overwrite formulas in user-entered columns, be sure your formulas roll all the way down the column and have not been overwritten with test data.
        vi. Clear the Last Updated By and Last Update columns all the way to the right of your data (the SecureSheet audit columns).
    B. Import the final Excel to SecureSheet.
6. Clear cell history.
    - Select this task from the **Admin Tasks** drop-down on your SecureSheet Home Page.
7. Confirm the number of users you have shared are covered by your licenses (contact SecureSheet

Support if needed).

8. Unhide the SecureSheet. This moves the SecureSheet to the Active section of your site where your users can access it from their SecureSheet Home Page.

Notes about maintaining SecureSheet once you open it to users:

- To maintain cell history, do not export and delete rows or export and reorder rows and then import. If you do, you will lose the cell history. Note: If you desire to reorder rows and maintain cell history after go-live, contact SecureSheet Support to turn on a property for your SecureSheet that allows the row order to change, and preserves cell history. The row count on imported files, however, must stay the same throughout a cycle; new rows must be added through the Add Rows view.
- If you need to update a value column in your compensation data for any reason, you can use the Import Values by View tool so that you do not have to export and import the entire SecureSheet.
    - First, set up a view with just the value-based data columns that you need to update.
    - Then, run the Import Values by View.
    - If you need assistance with this process, contact SecureSheet Support.
- If you do need to perform some maintenance on the SecureSheet after go-live (e.g., formula change), put the SecureSheet in maintenance lock first so your export/import process does not contend with your users entering data.
    - If a scenario arises and you have questions about the best approach to update formulas or data in a live SecureSheet, contact SecureSheet Support to review beforehand.

FAQs

Here are some questions in two sections - one for end users and another for SecureSheet administrators:

End User Questions	Quick Tips
How do I login?	
How do I reset my password?	
What happened to the changes I made?	You must click the red Save Changes button at the top of the Save Changes often.
When I filter and sort and want to get back to no filter or sort, how can I do that?	Click the Refresh link on the top right of the screen.
How do I sort my view?	
How do I filter my view?	
Can I control the font size on the screen?	Yes. Click the Zoom drop-down on the top right of the screer or decrease the font size in your browser window.
How can I tell where I need to enter information?	The cells where you can enter information are outlined hav

Can I default the Zoom setting to something other than 100%?	No, the Zoom setting is set by user. If a user changes their Zo that setting on successive logins. Users can also use their bro
Will the screen time out if a user takes over a certain amount of to close the page / hit save changes?	If a user leaves the session open, it will timeout after an hou
Is there an auto-save option?	There is no auto-save.
Can both an HRBP and a manager be in the SecureSheet making udpates at the same time?	Yes. All users can be working in a SecureSheet at any time. Cl other users until they are saved. If two users are editing simi time, they will not see one anothers changes until they eithe view.
Can I download a SecureSheet, make edits and upload back into SecureSheet?	End user permissions to export from / import into SecureShe organization's process owners and internal SecureSheet adm

Administrator Questions	**Quick Tips**
How do we change data once our SecureSheet is live?	Data management is based on the scenario. Updating cell va administrators at any time while the system is live in the All Administration view. The Data Management topic has many
I get a message that licenses have expired. How can we add licenses?	Contact SecureSheet Support.
Can managers only see and update their data?	Yes. You can set up secured Views that are authorized to spe address or special filters tied to a column in your master she what data a user is allowed to see and update in SecureShee work on the same sheet accessing only their specific informa
For managers to see their whole organization (roll up), does it work by Employee ID or by name?	SecureSheet can automatically infer a roll up when there is a Employee and their Manager. SecureSheet uses the Manage automatic rollup. The Manager must also have their own rov demographic info and not salary info if you are including hig not be included as individuals in the compensation planning
How do I set up other users to access SecureSheet?	Share the SecureSheet to them.
Does SecureSheet automatically set up an account for users?	Yes, when a user is shared to a SecureSheet, they are added Administration table in SecureSheet. On your IT side, their er provisioned to your organization's SSO setup (however you r
How do I remove a user from the system?	
How do I change cell formats?	
How do I increase the number of rows that show up on a page?	
Can I freeze rows and columns?	
How do I export SecureSheet to Excel?	
How do I change permission for a user?	
How do I add rows to my sheet?	

How do I add columns to my sheet?	
How do I add a new tab to SecureSheet?	
How do I rename a tab in SecureSheet?	
How do I rename my SecureSheet?	
How do I import values from Excel into SecureSheet?	
How do I paste values from Excel into SecureSheet?	You can copy a range of cells in Excel and paste into SecureSh upper left cell and using the browser paste function (e.g., rig Paste).
How do I paste formulas from Excel into SecureSheet?	From an administrator view (All Data or Administration), click view of your SecureSheet. Highlight a formula in the formula SecureSheet by clicking in the starting upper left cell and usin (e.g., right-mouse click and select Paste). If you have an ent your SecureSheet is active, you will have to lock it and expor formula(s).
How do I add a drop-down list in SecureSheet?	Dropdown lists are a type of Data Validation. These can be ad Excel.
I added new drop-down list values but they are not in the drop-down list. Why can't I see them?	To refresh drop-down lists after adding online, make sure the accommodate the extra rows where you entered new drop
Does conditional formatting in Excel import into SecureSheet?	Yes, and you may administer conditional formatting online w necessary.
How do I lock or protect cells?	
How do I blank out all the values (except my header rows) in SecureSheet?	Export your SecureSheet to Excel and blank out all the values SecureSheet.
Can I set up auto filters in SecureSheet?	
Is there an audit trail to show edit history in SecureSheet?	Yes. If you see an "H" in a cell, you may click into cell history. have questions about cell changes, contact your internal Sec can access the audit trail in SecureSheet.
Can I set up charts in SecureSheet?	Contact SecureSheet Support for assistance setting up charts
Can I set up macros in SecureSheet?	For security reasons, macros are not imported by SecureShee functions to tailor to unique requirements. Contact SecureSh
Can I set up pivot tables in SecureSheet?	Pivot tables are not support by SecureSheet. You can set up S your SecureSheet or on another tab to provide summary view
How can I tell if managers have printed statements for their employees?	Export the Audit Activity for the SecureSheet to see the "Exp shows which statements were exported and by whom.
Is there a unique link that we send to managers when it's time to go live?	Yes, the link your IT team gives you to login through Single Si users an email with the link to the SecureSheet login page a password.

User Management

The power of SecureSheet is that it can be used by multiple people around the world, anytime, anywhere. It is a living, real-time application available to anyone who has a web browser – and who has permission to use it.

When considering user access to SecureSheet, there are two keys that control their permission to get in and what views they see:

1. Maintaining the Users tab in your Users-Views SecureSheet. Without a "row" in the Users tab with their email address, an end user cannot get into a SecureSheet even if they are shared to it. The Users tab is the actual security cross reference for a SecureSheet.
2. Setting up their Sharing profile in the SecureSheet(s) they need permission to access. Sharing identifies what type of permission they are granted (e.g., Administrator, Update, View Only) and what Views they can see. If they are not shared to any views in a SecureSheet, but are in the Users tab, they will not see any SecureSheets when they login.

Users may also be set up to act as an impersonator of another user in the organization. For example, a higher level manager may delegate data entry to a support administrator. SecureSheet administrators can set up and impersonation list for end users to accomplish this.

These are the main tasks you perform to manage users:

- Adding User(s) for the First Time
- Updating the Sharing Profile for a Group of Users
- Updating the Sharing Profile for an Individual User
- Adding a New User to the Users Tab
- Using the Copy/Add All Sheets Share Tool
- Managing User Emails
- Lock Views from Users
- Troubleshooting User Login Error Messages
- Set up an Impersonation List for End Users

Video Resources:

- Run the Verify User Views Report
- Add users to sharing for the first time
- Update sharing for an individual
- Refresh Sharing
- Adding new user(s) using the Copy/Add All Sheets tool
- Locking Views Using a Lock Date and Time (on a View)
- Lock Each User with a Lock Date (on the Users tab)
- Set Up Impersonation List for End Users
- Impersonating a User for End Users

Manage Users and Sharing

Anytime you are adding a new user to SecureSheet, they must be in the Users tab in your Users-

Views SecureSheet, and also shared to their applicable views in your main SecureSheet. These are the main tasks to manage users:

- Maintaining Users in the Users-Views SecureSheet
    - Adding a New User to the Users tab in the Users-Views SecureSheet
- Sharing a SecureSheet to Users
    - Preparing for Sharing - Export and Sort Your Users-Views SecureSheet
    - Adding User(s) for the First Time
    - Updating the Sharing Profile for a Group of Users
    - Updating the Sharing Profile for an Individual User
    - Using the Copy/Add All Sheets Share Tool

Video Resources:

- Add users to sharing for the first time
- Update sharing for an individual
- Adding new user(s) using the Copy/Add All Sheets tool

Maintaining the Users Tab in the Users-Views SecureSheet

You fill out the Users tab with some required fields that SecureSheet uses for security set-up for each user:

- EEID
- Email Address
- First Name
- Last Name

For accurate tracking and ease in managing sharing, also maintain the views a user has permission to on the Users tab (Setting Up Users-Views).
Only remove a user from the Users tab if they are no longer part of the planning cycle or have left the organization.

Adding a New User to the Users Tab

When adding a new user to SecureSheet, they have to be on the Users tab in your Users-Views SecureSheet.

1. Click the **Users-Views** SecureSheet.
   NOTE: The Users-Views SecureSheet will likely be in the **Hidden SecureSheets** area of your SecureSheet site.
2. Go to the **Users** tab.
3. Select the **.Add Users** view from the View drop-down.
4. Fill in the user's information (if you are adding more than one new user, you may enter multiple rows at the same time).
5. Click **Save Changes**.
6. Continue with the instructions for Adding User(s) to Sharing for the First Time to share your new user to the SecureSheet they need to access.

Sharing a SecureSheet

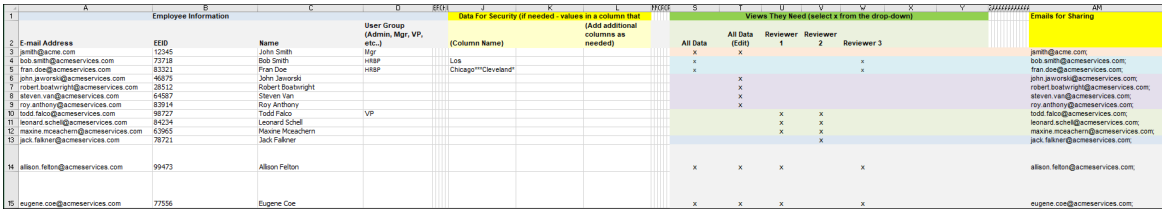
- You must have administrator permission to manage users and user sharing in SecureSheet.
- When you initially add users to a SecureSheet or change sharing settings for a group or groups of users, it is helpful to have them grouped on your Users tab (from your Users-Views SecureSheet) to copy/paste them into the Sharing box.
- Follow the steps below to prepare your Users tab for sharing or skip to:
    - Adding User(s) to Sharing for the First Time
    - Updating the Sharing Profile for a Group of Users
    - Updating the Sharing Profile for an Individual User

Preparing for Sharing - Export and Sort Your Users File

Group your users on your Users tab by following these steps:

1. Export your Users-Views SecureSheet and open in Excel.
2. Sort the users by View. This groups users with common Sharing profiles.
    - Optionally, highlight each common group with a different color. This may be visually helpful when copying emails to the Sharing box in the next steps, but it is not required.

NOTE: When working with Sharing for a group of users, their email addresses must be delimited by a semi-colon. The **Emails for Sharing** column is set to concatenate a semi-colon to the email address found in Column A. If you do not see this column in your export or it is not concatenating properly, add the Emails for Sharing column with this formula: =A2&";" and then highlight common groups.



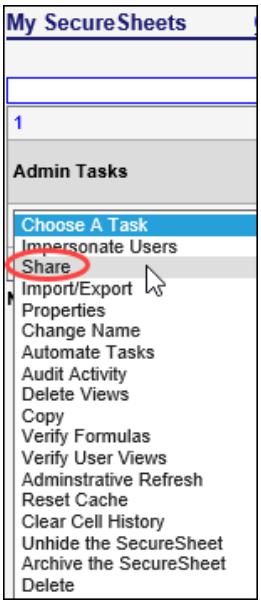
	A	B	C	D	J	K	L	S	T	U	V	W	X	Y	AM
1	Employee Information				Data For Security (if needed - values in a column that			Views They Need (select x from the drop-down)							Emails for Sharing
2	E-mail Address	EEID	Name	User Group (Admin, Mgr, VP, etc..)	(Column Name)		(Add additional columns as needed)	All Data	All Data (Edit)	Reviewer 1	Reviewer 2	Reviewer 3			
3	jsmith@acme.com	12345	John Smith	Mgr				x	x						jsmith@acme.com;
4	bob.smith@acmeservices.com	73718	Bob Smith	HRBP	Los			x				x			bob.smith@acmeservices.com;
5	fran.doe@acmeservices.com	83321	Fran Doe	HRBP	Chicago""Cleveland"			x				x			fran.doe@acmeservices.com;
6	john.jaworski@acmeservices.com	46875	John Jaworski						x						john.jaworski@acmeservices.com;
7	robert.boatwright@acmeservices.com	28512	Robert Boatwright						x						robert.boatwright@acmeservices.com;
8	steven.van@acmeservices.com	64587	Steven Van						x						steven.van@acmeservices.com;
9	roy.anthony@acmeservices.com	83914	Roy Anthony						x						roy.anthony@acmeservices.com;
10	todd.falco@acmeservices.com	98727	Todd Falco	VP						x	x				todd.falco@acmeservices.com;
11	leonard.schell@acmeservices.com	84234	Leonard Schell							x	x				leonard.schell@acmeservices.com;
12	maxine.mceachern@acmeservices.com	63965	Maxine Mceachern							x	x				maxine.mceachern@acmeservices.com;
13	jack.falkner@acmeservices.com	78721	Jack Falkner								x				jack.falkner@acmeservices.com;
14	allison.felton@acmeservices.com	99473	Allison Felton					x	x	x		x			allison.felton@acmeservices.com;
15	eugene.coe@acmeservices.com	77556	Eugene Coe					x	x	x		x			eugene.coe@acmeservices.com;

Adding User(s) to Sharing for the First Time

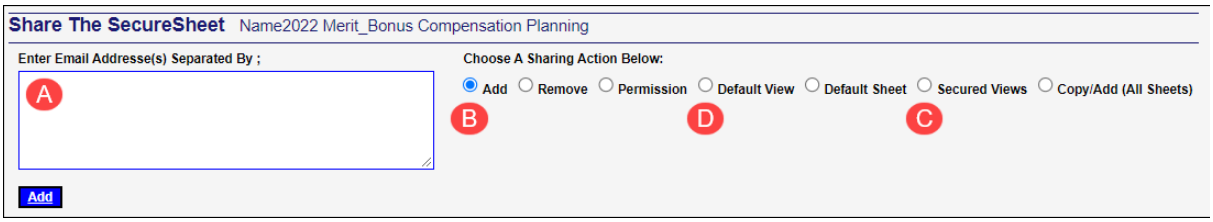
NOTE: When adding a new user(s) to SecureSheet, they have to be on the **Users tab** in your Users-Views SecureSheet, as well as be given access to secured views through Sharing in your main SecureSheet. Use the **Add Users(s)** view on the Users tab to add a new user.

To see a video on sharing users to to a SecureSheet for the first time, click here.

1. Open the SecureSheet that you want to share.
2. Select **Share** from the Admin Tasks drop-down or click **Share** from within the SecureSheet.



3. The Share page appears. Follow these steps to add users for the first time:



A. Enter the email address(es) in the Sharing box at the top, separated by a semi-colon.

NOTE: Refer to your exported and formatted Users tab. Copy the email addresses for a group of users with a common Sharing profile from the **Emails for Sharing** column and paste them into the Sharing box. Remember, when working with a group of email addresses, they need to be delimited by a semi-colon (e.g., samsnead@acme.com; alicewonder@acme.com).

B. The system defaults the Sharing Action to **Add.** Click the **Add** button below the box with the email address(es). The email address(es) will appear in the Sharing table.

C. With the email address(es) still in the box, click **Secured Views** at the top.

a. Select the Views from the drop-down list that you want the user(s) to be able to access.

b. Click the **Change Secured Views** button below the box with the email address(es). The Secured Views will now be visible in the Sharing table.

D. With the email addresses still in the box, click **Default Views** at the top.

a. Select the View from the drop-down list that you want the user to see as their first view when they login to SecureSheet. If no View is selected, the view order will be alphabetical.

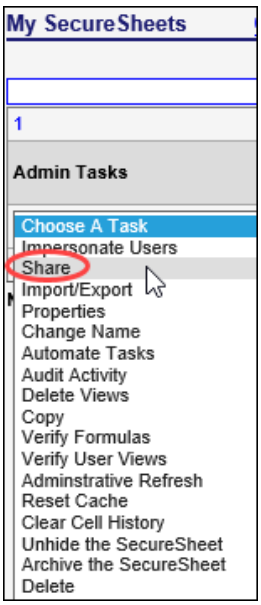
b. Click the **Change Default View** button below the box with the email addresses. The Default View you selected will now be visible in the Sharing table.

Repeat steps **3A – 3D** for each group of users with common Sharing profiles.

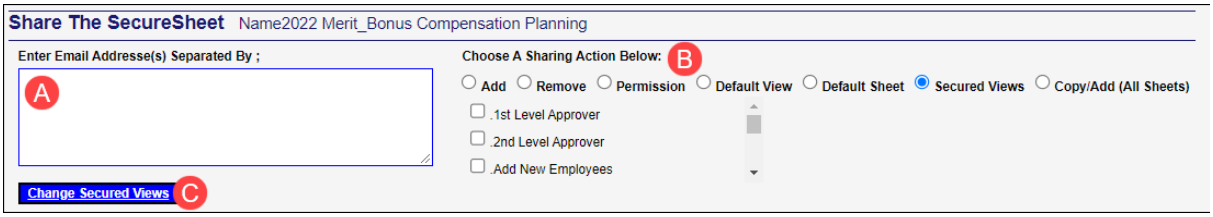
NOTE: User Permissions are usually set to Update or View Only. If you need to extend other capabilities to a group of users, contact help@securesheet.com.

Updating the Sharing Profile for a Group of Users

1. Open the SecureSheet that you want to share.
2. Select **Share** from the Admin Tasks drop-down or click **Share** from within the SecureSheet.



3. The Share page appears. Follow these steps to update the Sharing profile for a group of users:



A. Enter the email addresses in the Sharing box at the top, separated by a semi-colon.

NOTE: Refer to your exported and formatted Users tab. Copy the email addresses for a group of users with a common Sharing profile from the **Emails for Sharing** column and paste them into the Sharing box. Remember, they need to be delimited by a semi-colon.

B. Click the respective Sharing Action button that you want to update for this group.

- **Remove** – Removes the users from this SecureSheet tab.

  NOTE: User permissions are setup on each tab in a SecureSheet. If you have to remove a group of users, check to be sure they are removed from each tab they may have had permission to access.

- **Permission** – Defines what users can do on the sheet:

  - **Administrator** - allows user to access all administrator and end user views in a SecureSheet. In order to impersonate an end user as an Administrator, a user must be shared to all of the tabs in a SecureSheet. Administrator access is controlled at the SecureSheet level. This means that you may have different administrator groups across functional

areas/business untis acting as administrators only on the SecureSheet(s) relevant to their functional area/business unit.

- **Update** - allows user to update unlocked columns in the secured view(s) they have been given permission to access (most common permission granted).
- **Update/Import View Values** - allows user to import values into a view that has been setup for them to do so. Typically granted to users with a large organization or business partners who are updating massive amounts of data. For more information about this, click to import values by view.
- **View Only** - allows user to only view data in a secured view(s) they have permission to access in a SecureSheet. Even if columns are unlocked in a secured view, with **View Only** permission, a user cannot update unlocked columns in any view.

NOTE: User permissions are most often set to Update or View Only. If you have questions about permissions for your users, contact help@securesheet.com.

- **Default View** – The Secured View that defaults for the users when they access this tab in SecureSheet. This cannot be set until at least one Secured View has been saved for the user. If no tab is specified, they will default to the leftmost tab in the SecureSheet.
- **Default Sheet** – The tab that the user will default to after selecting the SecureSheet from their SecureSheet Home Page. If no tab is specified, they will default to the leftmost tab in the SecureSheet.
- **Secured Views** – Click the checkbox(es) next to the view names on or off to control the Views the user can access to see and/or input data.

C. Click the respective sharing action blue button beneath the Sharing box to enable your change. You will see your Sharing change in the Sharing table.

Repeat steps **3A – 3C** for each group of users with common Sharing profiles that you need to update.

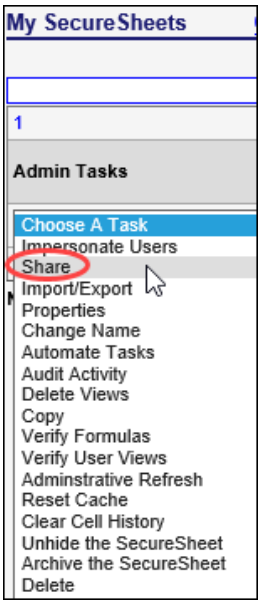
Updating the Sharing Profile for an Individual User

To see a video of updating an individual sharing profile, click here.

1. Open the SecureSheet that you want to share.

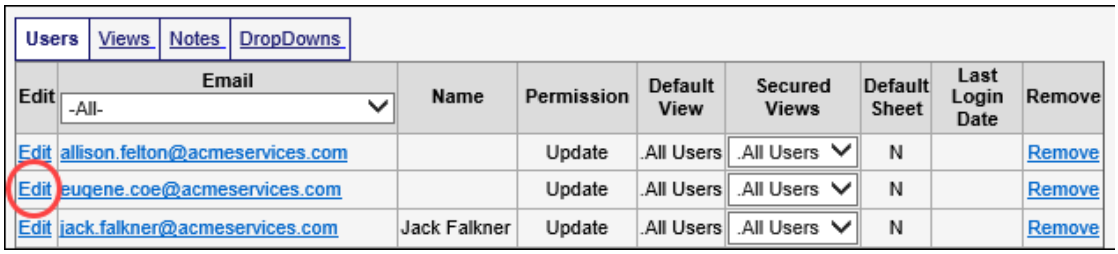
   NOTE: You can also change individual email addresses by clicking the **Edit** link next to the email address of the user you want to change. This will unlock the row and allow you to make desired changes. Press the **Update** link on the row when done (or **Cancel** to discard changes).

2. Select **Share** from the Admin Tasks drop-down or click **Share** from within the SecureSheet.

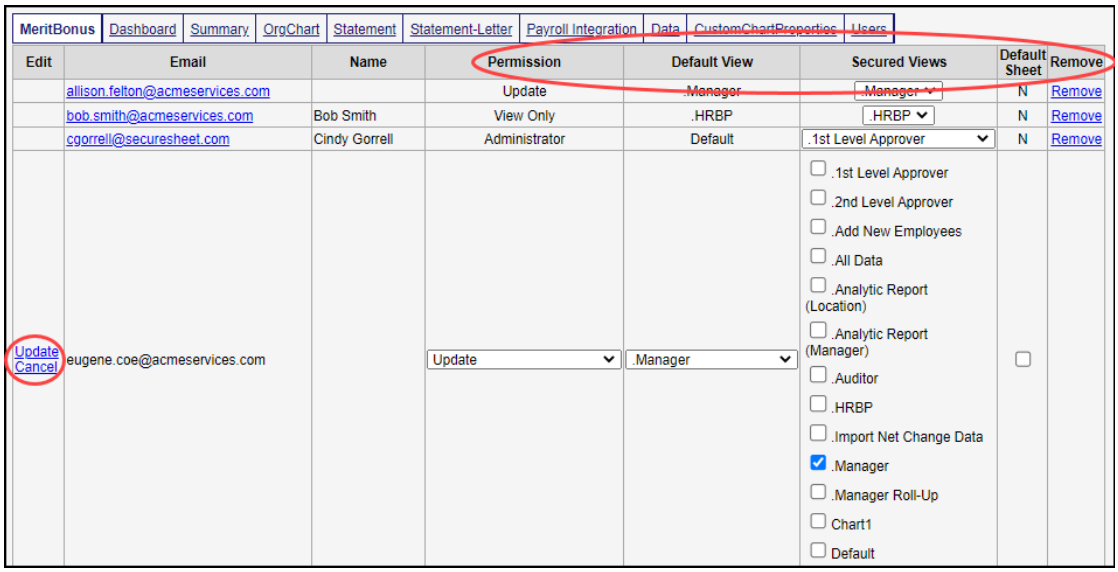


3. The Share page appears. Follow these steps to update the Sharing profile for an individual user:

A. Click the **Edit** link next to the user's email address.



B. Change the user's sharing profile as needed:



- **Permission** – Defines what users can do on the sheet:
  - **Administrator** - allows user to access all administrator and end user views in a SecureSheet. In order to impersonate an end user as an Administrator, a user must be shared to all of the tabs in a SecureSheet. Administrator access is controlled at the SecureSheet level. This means that you may have different administrator groups across functional

areas/business untis acting as administrators only on the SecureSheet(s) relevant to their functional area/business unit.

- **Update** - allows user to update unlocked columns in the secured view(s) they have been given permission to access (most common permission granted).
- **Update/Import View Values** - allows user to import values into a view that has been setup for them to do so. Typically granted to users with a large organization or business partners who are updating massive amounts of data. For more information about this, click to import values by view.
- **View Only** - allows user to only view data in a secured view(s) they have permission to access in a SecureSheet. Even if columns are unlocked in a secured view, with **View Only** permission, a user cannot update unlocked columns in any view.

NOTE: User permissions are most often set to Update or View Only. If you have questions about permissions for your users, contact help@securesheet.com.

- **Default View** – The Secured View that defaults for the users when they access this tab in SecureSheet. This cannot be set until at least one Secured View has been saved for the user. If no tab is specified, they will default to the leftmost tab in the SecureSheet.
- **Secured Views** – Click the checkbox(es) next to the view names on or off to control the Views the user can access to see and/or input data.

  NOTE: If you take off the view that was set as the Default View, you will have to click Update, select a new Default View, and click Update again.
- **Default Sheet** – If you select the checkbox, the user will default to this tab after selecting the SecureSheet from their SecureSheet Home Page. If no tab is specified, they will default to the leftmost tab in the SecureSheet.
- **Remove** – Removes the user from this SecureSheet tab.

  NOTE: User permissions are setup on each tab in a SecureSheet. If you have to remove a user, check to be sure they are removed from each tab they may have had permission to access.

C. Click the **Update** link next to the user's email address to save your changes.

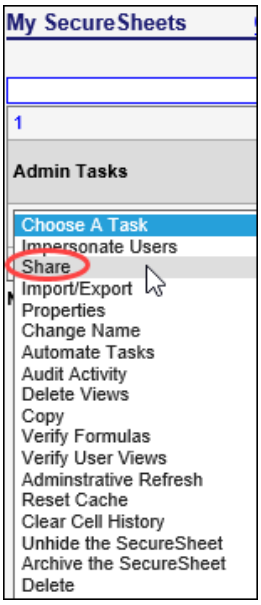
D. If needed, make additional individual user sharing updates following Steps **A – C**.

Using the Copy/Add All Sheets Share Tool

On occasion, it is helpful to copy an existing user's sharing profile to another user or group of users in need of the exact same profile. The Copy/Add All Sheets share tool makes this process simple. This can be useful after go-live when you have to add an additional user (s).

To see a video on adding new users using the copy/add all sheets tool, click here.

1. Open the SecureSheet that you want to share.
2. Select **Share** from the Admin Tasks drop-down or click **Share** from within the SecureSheet.



3. The Share page appears. Follow these steps to copy an existing user's profile to an individual or group of users in need of **the exact same** sharing profile:

A. Enter the email address(es) in the Sharing box at the top, separated by a semi-colon if more than one.

B. Click the **Copy/Add (All Sheets)** Sharing Action button.

C. Select the email address whose Sharing profile you want to copy to the email address(es) listed in the Sharing box.

D. Click the **Copy/Add (All Sheets)** blue button beneath the Sharing box to enable your change. You will see your Sharing change in the Sharing table.

E. Click **<<Go Back** when you are finished updating Sharing.

Impersonate Users for Admin Testing

During a SecureSheet implementation, the core project team needs the ability to fully test the end user experience prior to go-live.

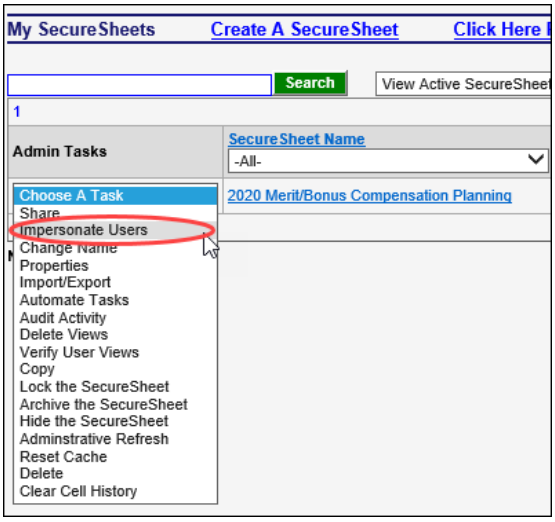
In SecureSheet, administrators can impersonate another user in their organization and see exactly what that user has been given permission to see based on their security and the views they are shared to in the SecureSheet. This allows administrators to validate that your security is setup properly before go-live.

After go-live, impersonating users is a powerful support tool that allows administrators to troubleshoot issues without having to access another computer or set up a video conference. You can impersonate a user even while the user is logged into SecureSheet.

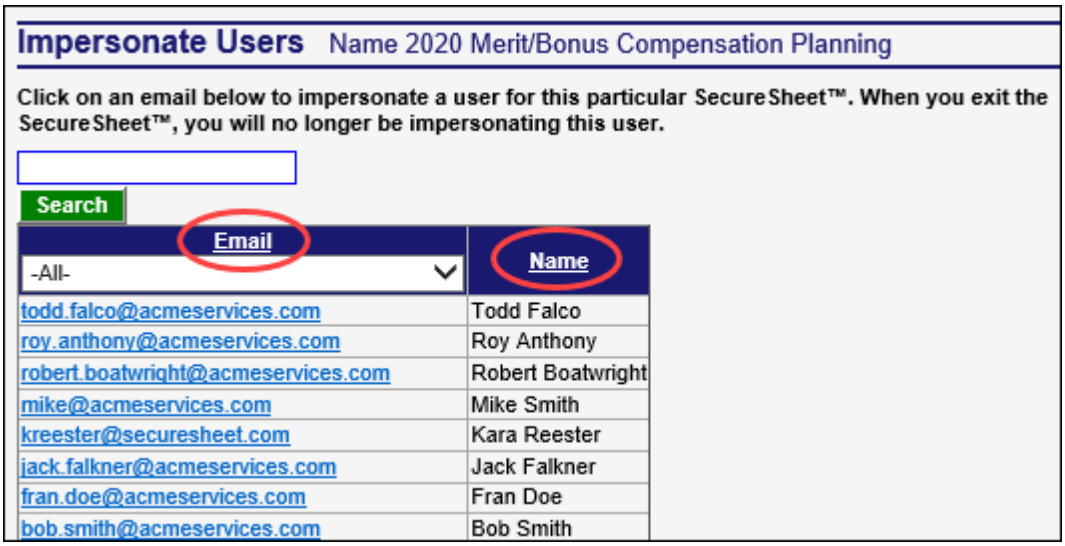
> **NOTE:** SecureSheet's audit history logs any changes made by an administrator while impersonating a user.
> **NOTE:** SecureSheet administrators must be shared to every tab in a SecureSheet in order to impersonate a user.

Impersonating Users for Admin Testing

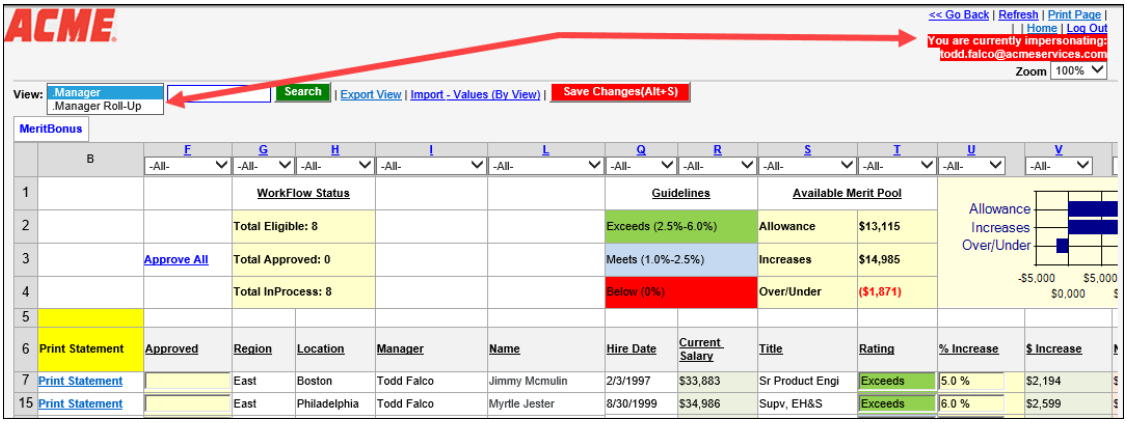
1. Login to SecureSheet.
2. Select **Impersonate Users** from the **Admin Tasks** drop-down next to the SecureSheet Name you are testing.



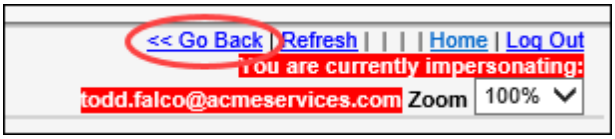
3. Select the email of the user you want to impersonate from the Impersonate Users list. The Impersonate Users list contains every user that has been shared to the SecureSheet.
   - Use the Search functionality to locate a specific user.
   - You can sort on either the Email or Name column, ascending (first time you click on heading) or descending (second time you click on heading).



4. The Views for the user that you are impersonating will be available from the Views drop-down. The name of the user that you are impersonating will be highlighted in red in the upper-right (as a reminder that you are impersonating).



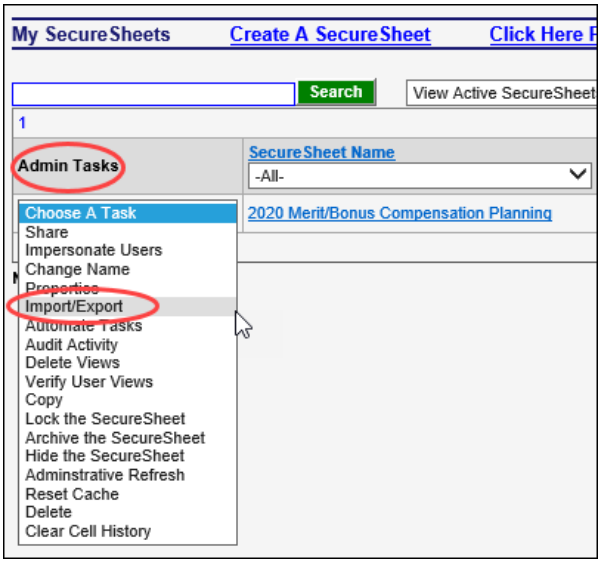
5. To return to your user permissions, click **<< Go Back**.



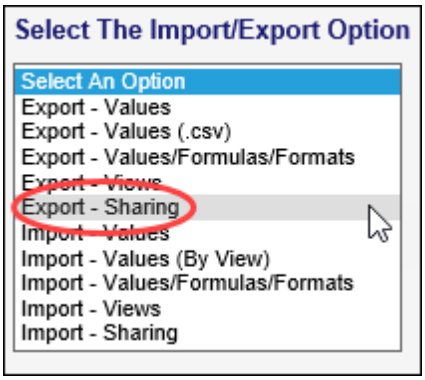
Export Sharing

The Import/Export tools in SecureSheet includes an export of sharing. This export shows you the sharing setup for a SecureSheet. You can see the permission, the default view, and the secured views for each user that has been shared to the SecureSheet.

1. Select **Import/Export** from the **Admin Tasks** drop-down next to the SecureSheet you want to export.



2. Click **Export - Sharing**.



3. Click **Export** to export the file to Excel.

4. The Sharing export will open in Excel.
5. In SecureSheet, click **Reset** to continue using Import/Export tools, or click **<<Go Back** to return to your SecureSheet Home Page.

Set Up Impersonation for End Users

When you have an employee(s) who need to assist with data entry for another team member, you may set up an Impersonation List to allow an employee to act on behalf of another. An impersonator may be set up to impersonate more than one user. The employee(s) set up as impersonators will have the same permissions as the user(s) they have permission to impersonate.

> **NOTE:** If an end user will only be impersonating other end users and not have any views related to their role, they will not be shared to the SecureSheet, and they will not need to be added to the Users tab in the Users-Views SecureSheet. Their email address will need to be added to the Email (User) Administration file in order for them to access SecureSheet as an impersonator.

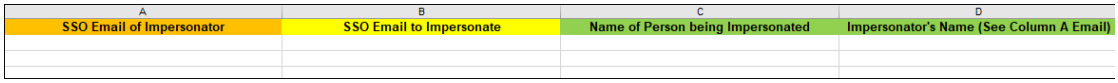
Video: Set Up Impersonation List

Setting Up an Impersonation List for End Users

An Impersonation List SecureSheet has been set up for your organization and can be found in the Hidden SecureSheets area.

1. Login to SecureSheet.
2. Go to the Hidden SecureSheets section of your site.
3. To fill out the list:

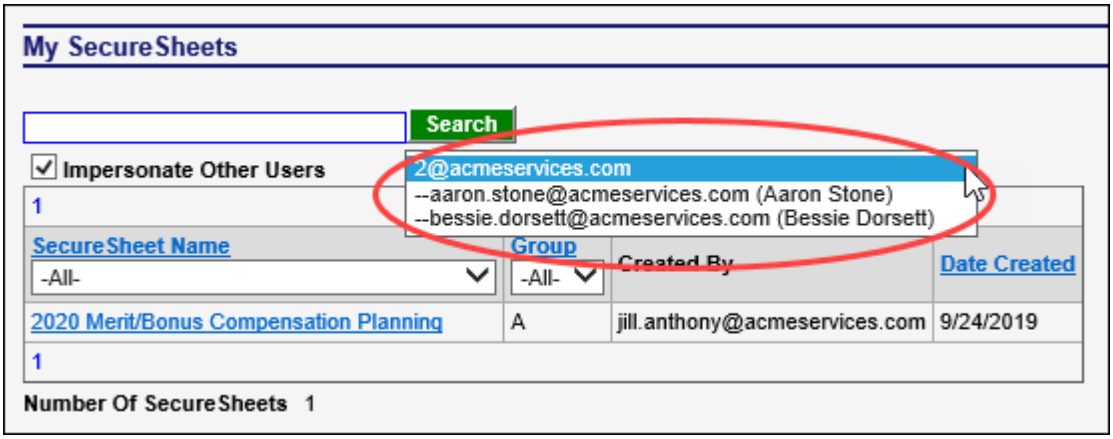
A. Export the Impersonation List SecureSheet (refer to Import/Export instructions as needed), fill it out in Excel, and import.
   OR
B. Fill in the Impersonation List on-line in the **.Add Impersonator** view. Remember to click **Save New Rows** periodically as you are entering data.



A	B	C	D
SSO Email of Impersonator	SSO Email to Impersonate	Name of Person being Impersonated	Impersonator's Name (See Column A Email)

Click **<< Go Back** or log out of SecureSheet when you are done setting up the Impersonation List.

NOTE: End users will have an Impersonate Other Users checkbox on their home page and a dropdown list to select any of the people they have been permissioned to impersonate based on the Impersonation List you set up.



NOTE: In order for the impersonation list to work for end users, there are two system properties on your Organization Profile: Impersonation Group ID and Impersonation Grid ID. These properties are identified in the Sheet Name of your Impersonation List SecureSheet and can only be set on your Organization Profile by the SecureSheet Support Team. An example of these Sheet Properties: 5 - 1, where 5 is the Group ID and 1 is the Grid ID.

Email (User) Administration

SecureSheet is a self-registering system. No system administration is required to add users. An email (user) is automatically added to your SecureSheet main Email (User) Administration file whenever an email is added through SecureSheet Sharing (i.e., you are sharing at least one view to a user within a specific SecureSheet).

An email (user) may be added manually through the Email (User) Administration tool, though Sharing is the primary way emails are automatically created as users in SecureSheet.

An email (user) may also be granted System administrator permission which allows that specific email system-wide access to your SecureSheet site.

The following tools are available to maintain email (user) addresses individually in Email (User) Administration:

- Reset Password
- Remove Sharing
- Copy Sharing
- Add Email Address

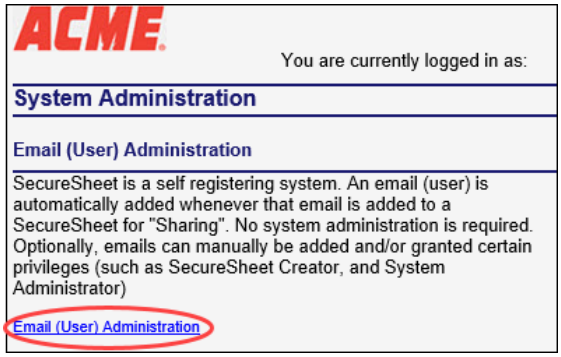
- Change Email Address
- Delete Email
- SecureSheets Where Used
- Share Admin to All Sheets

Over time using SecureSheet, you may find that you need to delete email addresses from your main Email (User) Administration file to remove email addresses that are no longer needed by the system.

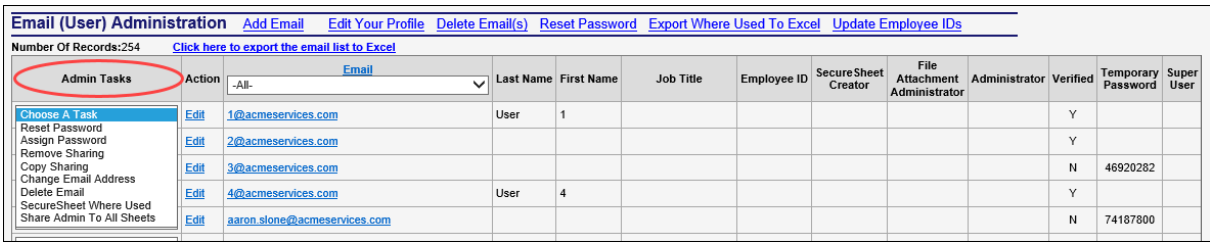
Maintaining Email (User) Administration

1. Login to SecureSheet.
2. Click **System Administration** in the upper right navigation on your SecureSheet home page.

3. Click **Email (User) Administration**.



4. You may manage a user's set up through the tasks in the **Admin Tasks drop-down** (steps for each task provided below):



OR

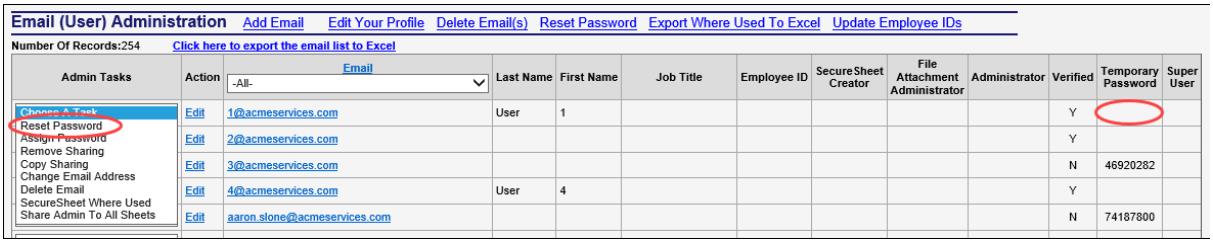
You may **Edit** an individual user's row to maintain their user information and administrator privileges:

A. Click **Edit** next to the user's row you want to update. The row will become updatable.
B. Update the user's Last Name, First Name, Job Title and/or Employee ID fields.
C. Check the **File Attachmentadministrator** checkbox to allow the user to use File Attachments in SecureSheet (often reserved for the project team).
D. Check the **administrator** checkbox to allow the user administrator privileges across your organization's entire SecureSheet site.
E. Click **Upd** to save your changes.

Reset Password

If your organization users are logging in through SecureSheet's login page, you may create a new temporary password for a user if needed. If your organization is using Single Sign-On (SSO), you will not need to reset passwords for users, as their authentication will be managed through SSO.
It is recommended that users logging in through SecureSheet's login page manage their own passwords. If a user forgets their password, they may click the "Forgot Your Password?" link on the login page to receive a temporary password from the system. However, in special scenarios, a user may require a manual reset.

1. Select **Reset Password** from the **Admin Tasks** drop-down for the user whose password you want to reset. The Temporary Password column will be blank.



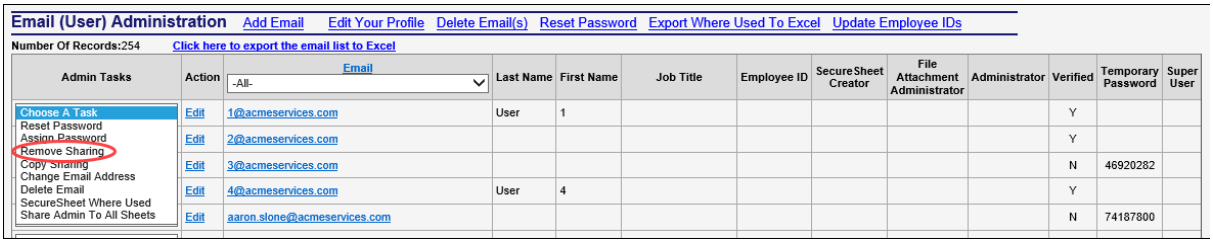
2. The Temporary Password column will fill in with a Temporary Password that you may copy and send to the user.

> **NOTE:** You will know when the user has logged in and reset their Temporary Password when the **Verified** column is **Y** and the Temporary Password column is blank.

Remove Sharing

Remove a user from all SecureSheets that they are shared to in your organization. You must complete this task before you will be able to delete an email from the system.

1. Select **Remove Sharing** from the **Admin Tasks** drop-down next to the user whose sharing permissions you want to remove.

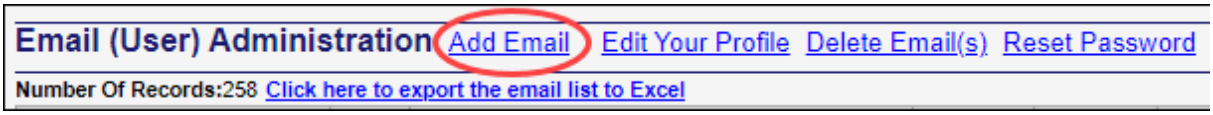


2. You will be automatically returned to the user list. If this user should not be able to access SecureSheet any longer, be sure to delete them from the system.

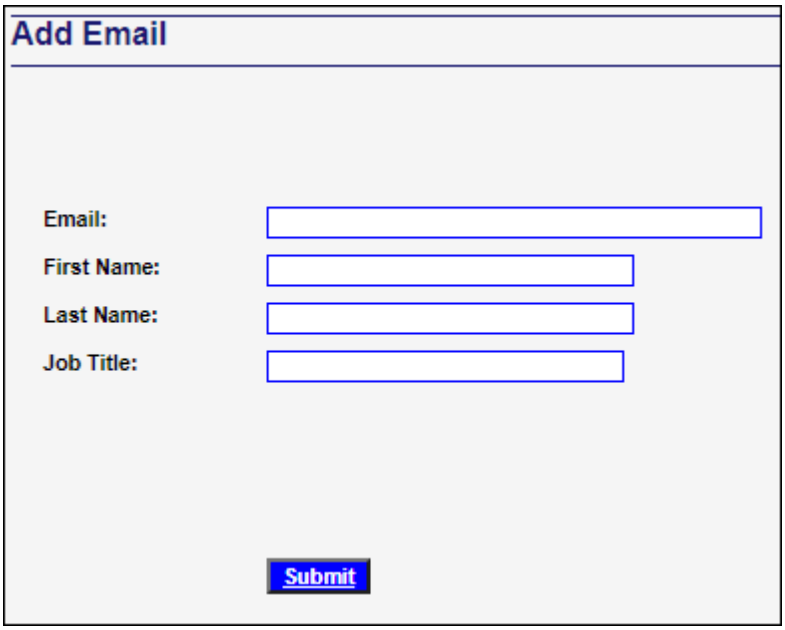
Add Email Address

Add an email address for a user. You may use this tool if you are adding a user who will only impersonate another end user in SecureSheet and not have any other views related to their role. Their email address needs to be in the system so that they may login and impersonate as an end user (which you would setup separately.

1. Click **Add Email**.



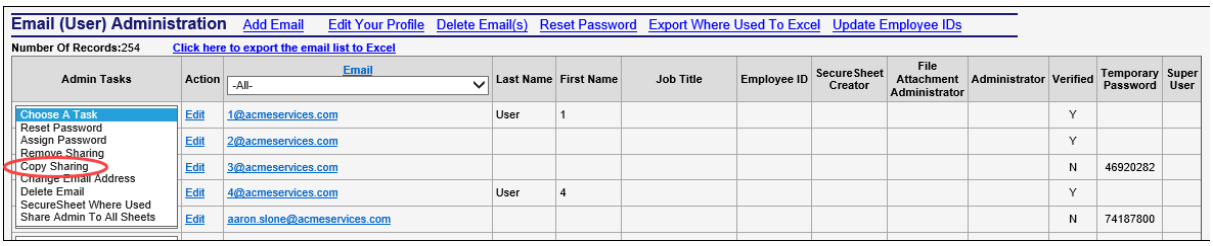
2. Fill out the details on the **Add Email** screen.
3. Click **Submit**. The email address is now in the Email (User) Administration file for your site.



Copy Sharing

Copy one user's sharing profile to another user who requires the same security access.

1. Select **Copy Sharing** from the **Admin Tasks** drop-down next to the user whose profile you want to copy TO another user.

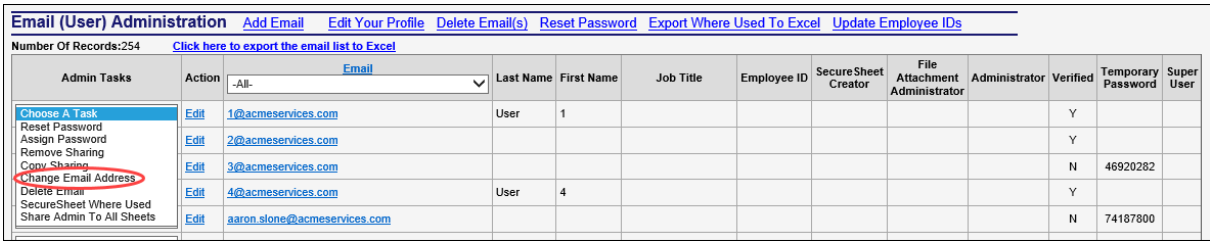


2. The user profile you select to copy will default to the **From Email** field.
3. Select the user you want to copy the sharing profile to from the **To Email** drop-down.
4. Click **Copy**.

Change Email Address

Change the email address for a user. Their Sharing security remains the same. The email address you change from will be deleted.

1. Select **Change Email Address** from the **Admin Tasks** drop-down next to the user whose email you want to change.

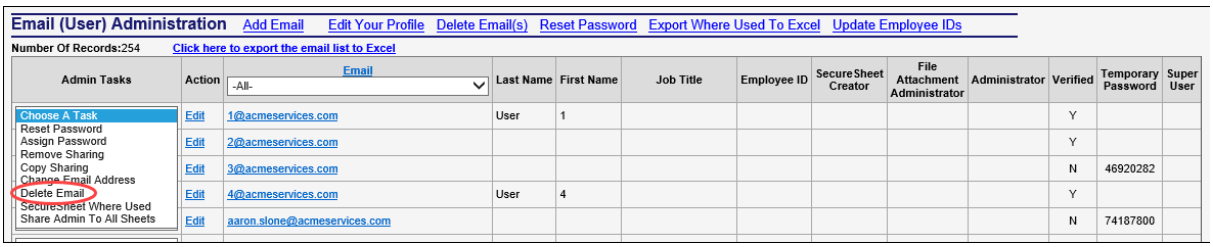


2. The **From Email** will default to the user's existing email.
3. Enter the updated email address in the **To Email** field.
4. Click **Change**.

Delete Email

Delete a user from the system. In order to delete a user from SecureSheet, you must first Remove Sharing from their email address.

1. Select **Delete Email** from the **Admin Tasks** drop-down next to the user you want to delete from SecureSheet.



2. You will be automatically returned to the user list and the email address will have been deleted from the system.

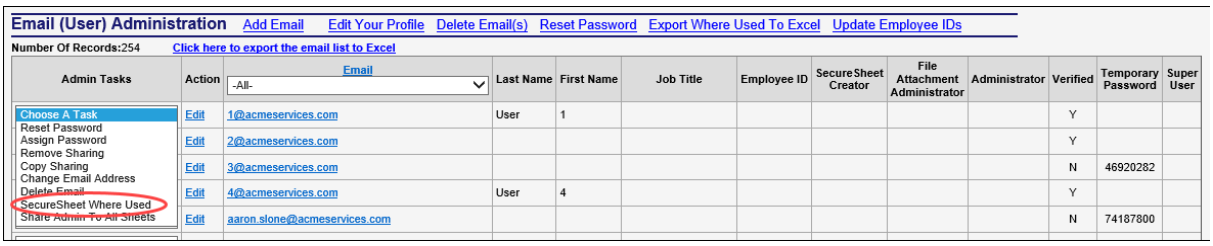
NOTE: If you delete an email from the Email (User) Administration table in SecureSheet, the user may still be on the Users tab of a Users-Views SecureSheet(s). Even if they remain on the Users tab, they will not have access to SecureSheet(s) because you removed sharing and deleted their email

address here.

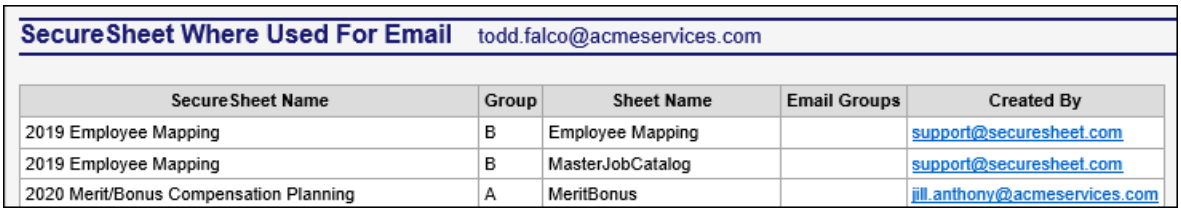
SecureSheets Where Used

Display a list of all the SecureSheets and tabs within each sheet currently shared to a user.

1. Select **SecureSheet Where Used** from the **Admin Tasks** drop-down next to the user whose Sharing you want to see.



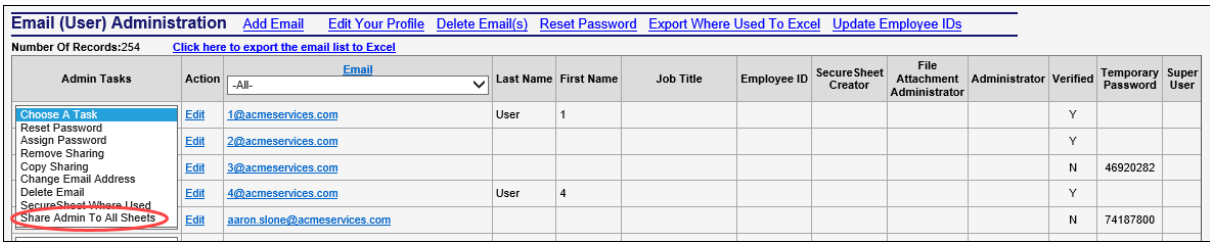
2. You will see a list of all SecureSheets and tabs (Sheet Name) within each SecureSheet shared to this user.



Share Admin to All Sheets

Grant administrator permission to all SecureSheets and tabs within each sheet to a user.

1. Select **Share Admin To All Sheets** from the **Admin Tasks** drop-down next to the user who you want to grant administrator permission.



2. You will be automatically returned to the user list. This user will have administrator access to all SecureSheets and all tabs within each SecureSheet in your SecureSheet site.

Delete Unused Email Addresses in Bulk

When you use SecureSheet year over year, changes to your workforce or updates to your IT infrastructure (e.g., email address changes) may impact your SecureSheet users.

To perform this maintenance of email addresses, you review the email addresses that are in your SecureSheet main Email (User) Administration file in Excel by taking an export of your main Email (User) Administration file, note those that are no longer needed, and then delete them from SecureSheet using the Delete Email(s) tool.

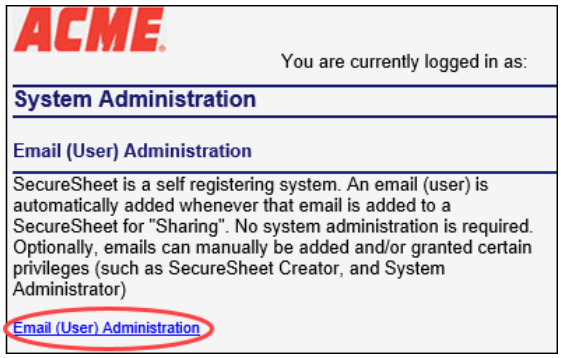
NOTE: If you delete emails from the Email (User) Administration table in SecureSheet, users may still be on the Users tab of a Users-Views SecureSheet(s). Even if they remain on the Users tab, they will

not have access to SecureSheet(s) because you removed sharing and deleted their email address here.

Deleting Email Addresses in Bulk

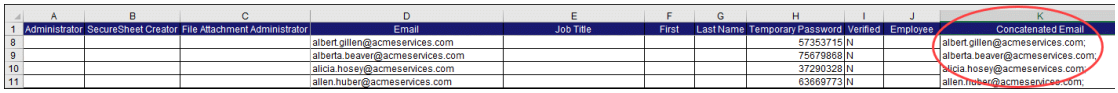
1. Login to SecureSheet.
2. Click **System Administration** in the upper right navigation on your SecureSheet home page.

3. Click **Email (User) Administration**.



4. This is your main Email (User) Administration file; it contains all the email addresses for users of SecureSheet. Click the link to **export the email list to Excel**.

5. Open the exported file in Excel and remove all the rows containing email addresses that you want to **keep**. Your goal is to have a list of email addresses that you need to delete from SecureSheet.
6. Once you have the list of email addresses to delete, format them to easily delete in bulk in SecureSheet:
   - Add a column in Excel that concatenates a semi-colon to the end of the email address using a formula like:
     =D2&";"
     where D2 is the column that contains the email addresses. You will copy this column into the Delete Email(s) tool in SecureSheet.



7. Go back into SecureSheet to the Email (User) Administration file (see Step 4) and click **Delete Email(s)**.

8. Copy the rows from the Excel email address list with the semi-colon concatenated emails that you want to delete.
9. Paste the list of semi-colon concatenated emails into the **Enter Email Address(es) Separated By ;** box.
10. Click **Delete**.

11. You will see an alert that changes are saved successfully.
12. Click **<< Go Back** to return to the Email (User) Administration file.
13. Click **<< Go Back** again to return to the System Administration tools.

Lock Users from Updating Data

During your planning cycle, you may want to prevent a user or a group of users from entering data into SecureSheet and/or seeing data in SecureSheet for a certain time period. Scenarios may include:

- Lower level managers input their data before upper level managers, and you want to lock out upper level managers until it is their turn.
- The deadline for data entry has passed, managers may view data but not make any changes.
- Managers cannot see data during the calibration phase.
- Managers can only view data during the calibration phase before exporting statements to communicate compensation changes.
- A manager is in transition mid-cycle.

SecureSheet has different approaches to prevent users from making changes to data in SecureSheet; you may choose to apply one approach or multiple approaches depending on your process:

1. Set the Lock Date on each end user view. Users can still access their views, but depending on the way you set the lock date, they will be able to see their rows of data or only see column headings in their view(s) with no data rows. This supersedes the UnLock settings on the columns in the view. This also applies to every user who is able to access this view. If you need to be more specific in your locking approach, consider approach 4 below.
2. Lock the SecureSheet. Users will be able to see their rows of data but not be able to make any updates. Locking a SecureSheet supersedes the UnLocked setting on the columns in the view.
3. Set all UnLocked columns to Locked. (Note: In next year's cycle, you will have to adjust the column settings back to UnLocked).
4. Set a Lock Date on your Users tab for each user to customize locking each user from each view individually (in your Users-Views SecureSheet).
5. Lock users by updating their sharing permission. (Note: The other locking options are

more commonly used; this approach is an "extra" admin step for your reference/consideration).

6. If you do not want end users to see the SecureSheet at all before they are able to export statements, hide the SecureSheet.

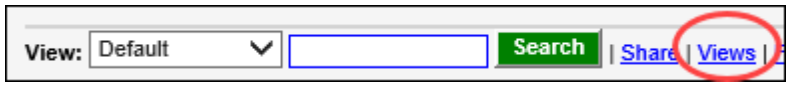
Video Resources:

- Locking Views Using a Lock Date and Time (on a View)
- Lock Each User with a Lock Date (on the Users tab)

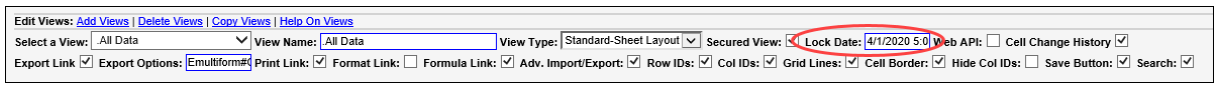
Locking Views Using a Lock Date/Time

When you apply View locking, the locking rule is set for all Users with access to that View. You can update the locking rule on any View at any point in your planning cycle.

1. After logging in, click **Views**.



2. Select the View from the **Select a View** drop-down list to update its locking rule.
3. Set the **Lock Date** on the View according to the Lock Date and Time Rules below.



Lock Date and Time Rules	
Lock Date Example	**Result for End User**
11/8/20 12:01 PM	Locks and hides the rows
11/8/20 12:02 PM	Locks the rows
11/8/20 12PM	Locks the rows
11/8/20	Sets to 11/8/20 12:00AM – Locks the rows

4. Click **Save View**.
5. Repeat Steps 2 – 4 for each View that needs a locking update.

Lock Each User with a Lock Date on the Users Tab

On the Users tab, in each view's respective lock date column, add the lock date you want per user. If no lock date, the view stays open. If needed, a different lock date can be set per user per view.

Name	User Group (Admin, Mgr, VP, etc..)	SVP Lock Date	VP Lock Date	Manager Lock Date
Todd Falco	SVP	6/29/2023		6/29/2023
Allison Felton	VP		6/24/2023	6/24/2023
Maimie Townley	Manager			6/23/2023

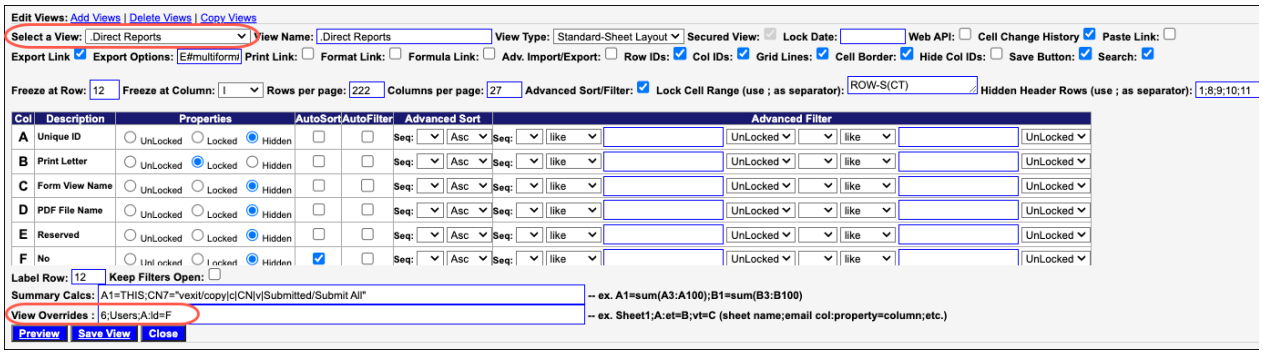
In this example, the SVP Lock Date for Todd Falco will lock the SVP view on 6/29/2023 at 12:00AM ET. If you don't want a user to see the data in the view, setup the lock date as 6/29/2023 12:01AM. This will suppress the detail rows from the view. Either way, the user will see a message that the view is set to view only.

When using this appraoch, the following syntax needs to be added to the View Overrides line in the View Setup on each end user view:

6;Users;A:ld=F

Where:

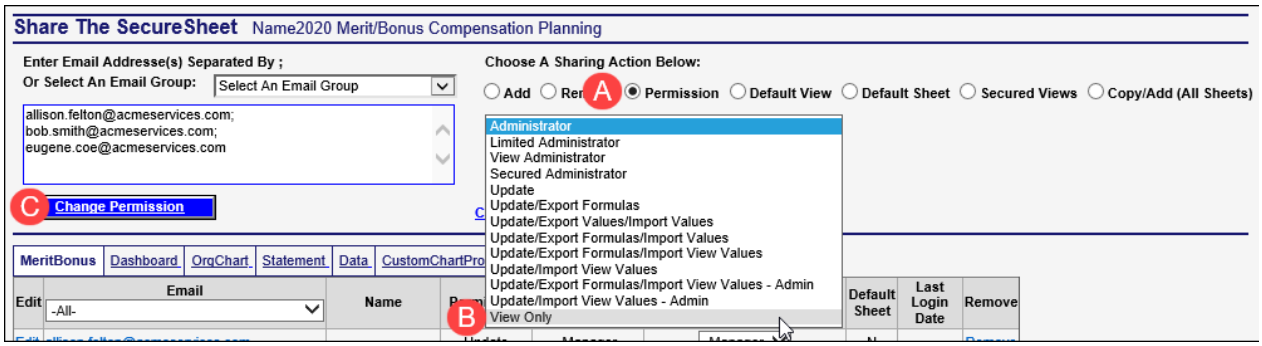
- **6** is the SecureSheet number of your Users-Views-2023
- **Users** is the name of the tab where the lock date will be found in column F for the view (in your Users-Views SecureSheet)
- **A** is the column with the user's email on the Users tab
- **ld** stands for "lock date"
- **F** is the column where the lock date is located on the users tab for this view



Locking Users through Sharing Permission

When you want a user or a group of users to be able to view their data and not make any updates, you may change their permission to View Only by updating their Sharing profile. This allows you to leave a subset of users with Update permissions if you need to, in case they need to make last-minute changes, for example.

1. After logging in, click **Share**.
2. The Share page appears. Follow these steps to update Permission to View Only for a group of users:



A. Enter the email addresses in the Sharing box at the top, separated by a semi-colon.

B. Click the **Permission** Sharing Action button.

C. Click **Change Permission** beneath the Sharing box to enable your update. The permission for each of the users in the Sharing box changes to View Only in the Sharing table.

When you are finished, click **<< Go Back** or log out of SecureSheet.

Troubleshoot User Login Error Messages

Troubleshoot User Login Error Messages

Scenario:

- A User cannot log in, but all other views are okay. Administrators may impersonate, access other sheets, etc.

Action:

- If you see that all other views are functioning as expected, it is likely an issue with the View Properties.
- Export Views in the Import/Export tools and look at the filters and Summary Calc in the view. That is where you may find the issue.

View Management

Overview of Views

- A View is a slice of the data on a tab in your SecureSheet that is designed with specific columns visible for the user(s) of that view.
- For each column in a view, you specify whether or not the user(s) can updated or just view data in each column they may see.
- A View also controls the filtering of the data that each user is given permission to access in the view.
- Each tab in your SecureSheet may have multiple Views.

You have the flexibility to design as many different views of the columns in the sheet as you need for the people in your organization who may need to see different slices of the data.

For instance, you may have many columns in your spreadsheet that are for compensation planning administrative use only and never need to be shown to your planning managers (end users). You may hide those columns from your end users as needed.

Setting Up Views

When you create a SecureSheet for the first time, you follow the process for setting up Users-Views to document the design of your Views and identify the security parameters for the users who will have permission to each view that you design. You have to be an administrator to set up and maintain Views in SecureSheet.

After your SecureSheet is created, you may set up and manage the Views in it. The main tasks are:

- Column Settings in Views
- Setting Maximum Rows for a View
- Properties of a View
- Add an Approve or Submit All Link to a Column
- Adding a new View
- Copying an existing View
- Editing a View
- Deleting a View
- Changing the Name of a View
- Set Up an Add Rows View
- Set Up a View to Import or Paste Values Into
- Set Up a View to Export Values
- Set Up a View to Export with Formulas
- Set Up a Summary View
- Verify User Views
- Using Special SecureSheet Filters in a View
- Find the SecureSheet ID for Advanced Filters

Video Resources:

- Standard Administrator Views in a SecureSheet
- Adjust Column Settings in Views

Add, Edit, Copy, or Delete Views

When you are adding views to your SecureSheet initially, you will follow the design you have laid out in the Views tab of your Users-Views file.

TIP: If more than one of your views share similar properties, after you add one of them and set up its properties (e.g., column settings and filters), it may be helpful to use that view as the base for the other views by copying it to a new view.

Quick links:

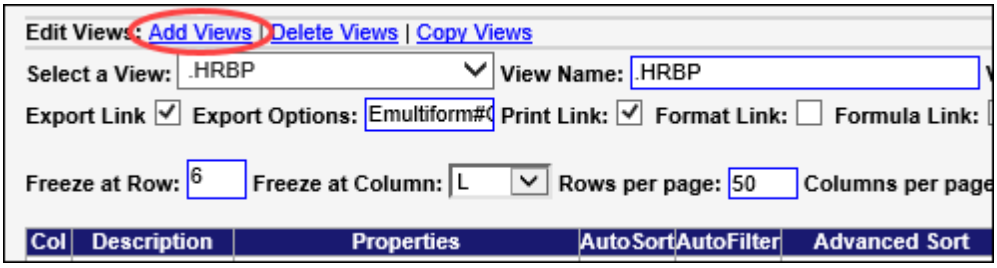
- Add a new View
- Copy an existing View
- Edit an existing View
- Change the Name of a View
- Delete a View

- Modify View Properties

Adding a New View

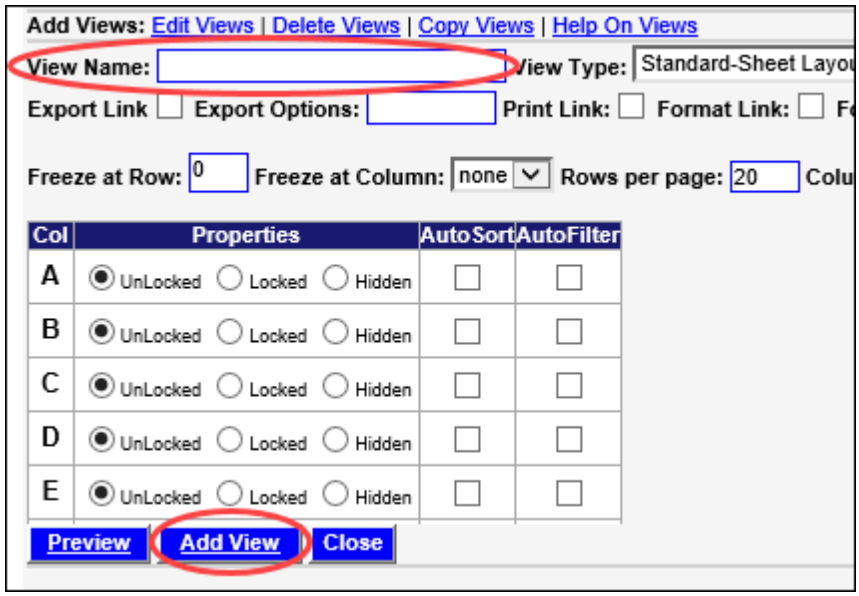
1. Select the SecureSheet from your home page.
2. Click **Views**. This puts you into View design.

3. Click **Add Views** to create a new view.



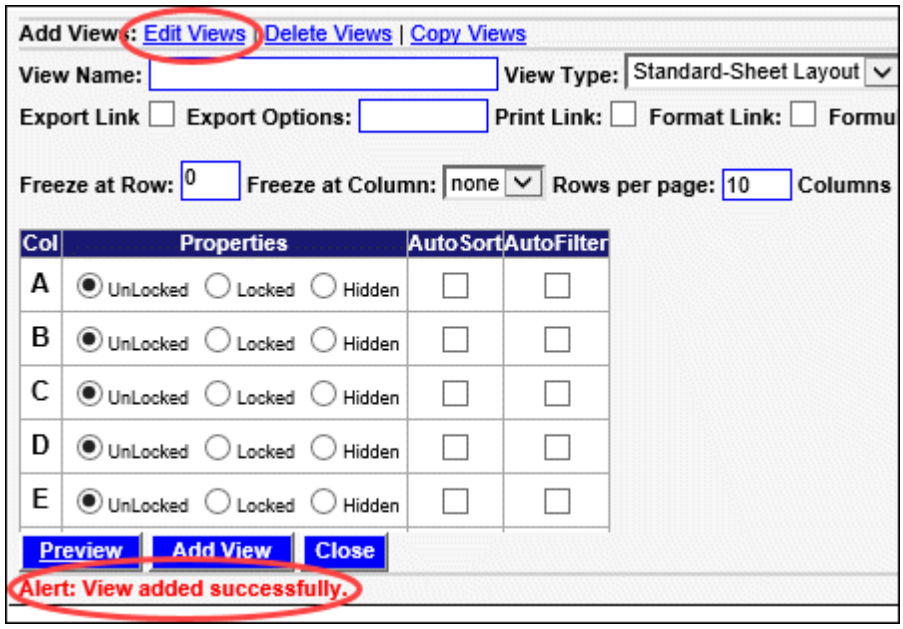
4. Enter a name in the **View Name:** field and click **Add View**.

   NOTE: If you have more than one view to add, repeat Step 4 for each new view.



5. Click **Edit Views** to open the view properties and edit as needed.

   NOTE: Security filters must be added to the new view and tested.



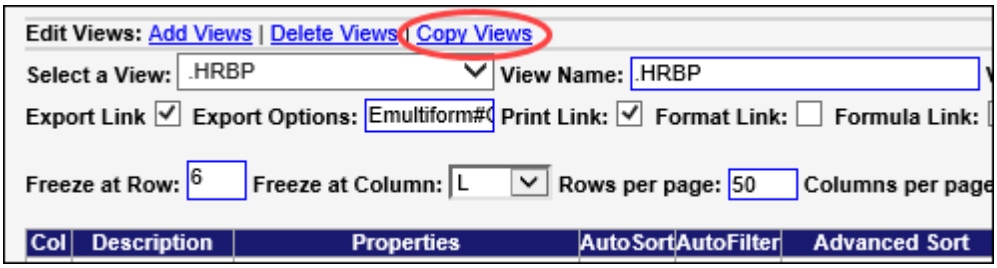
OR

Click **Close** to leave View design mode.

Copying an Existing View

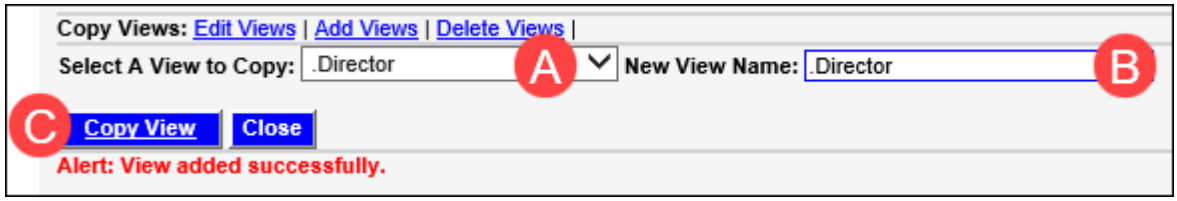
1. Select the SecureSheet from your home page.
2. Click Views. This puts you into View design.

3. Click **Copy Views** to copy an existing view and its properties to a new view.



4. The "Alert: View added successfully" message will appear.
   A. Select the view you want to copy from the **Select A View to Copy:** drop-down.
   B. Enter the name for your new view in the **New View Name:** field.
   C. Click **Copy View**.

   NOTE: If you have more than one view to copy, repeat Step 4A through 4C.



5. Click **Edit Views** to open the view properties and edit as needed.
   NOTE: Security filters must be updated and tested for the newly copied view.

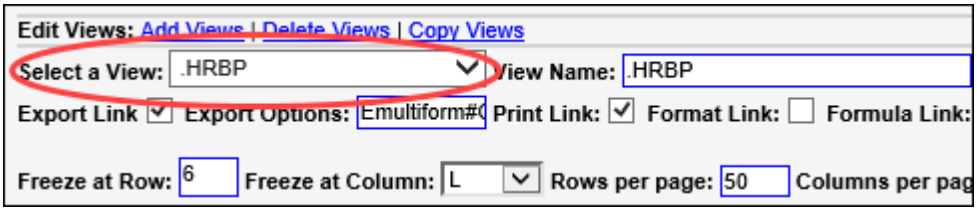
OR

Click **Close** to leave View design mode.

Editing an Existing View

1. Select the SecureSheet from your home page.
2. Click Views. This puts you into View design in the Edit mode.

3. Select the view you want to work with from the **Select a View:** drop-down.



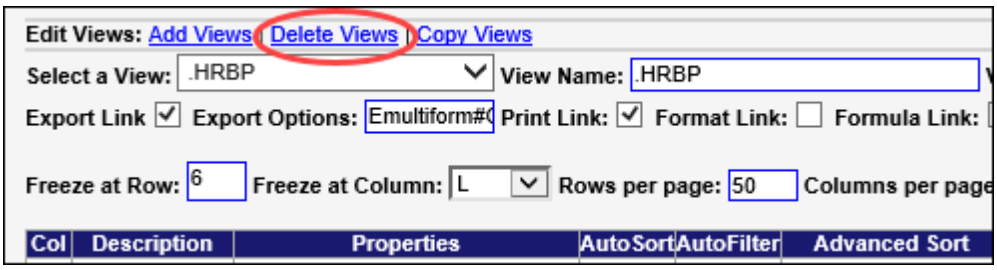
4. Modify the view properties as needed.

   NOTE: If you want to **change the name** of the view, update the **View Name:** field. When you click **Save View**, the view name will be updated everywhere you see it in the SecureSheet.
5. Click **Save View** to save any changes you make to the view.
6. Click **Close** to leave View design mode.

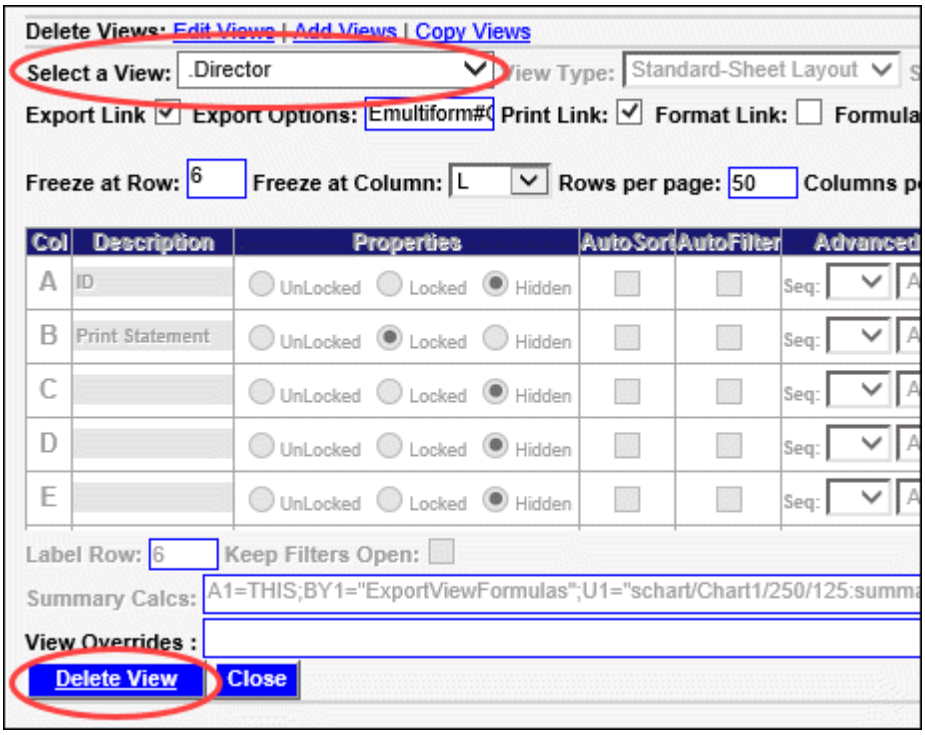
Deleting a View

1. Select the SecureSheet from your home page.
2. Click Views. This puts you into View design in the Edit mode.

3. Click Delete Views.



4. Select the view you want to delete from the **Select a View:** drop-down.



5. Click **Delete View** to save any changes you make to the view.
6. Click **Close** to leave delete view mode.

Column Settings in Views

In each View in SecureSheet, columns may be UnLocked, Locked or Hidden from end users who are shared to the view. Column settings may be adjusted at any time after your initial SecureSheet is created.

To see a video on adjusting column settings, click here.

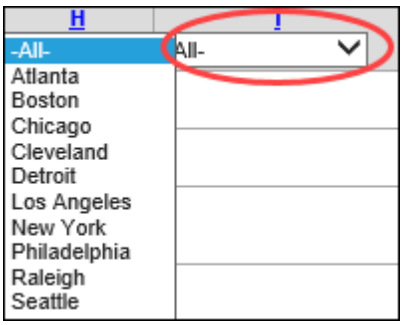
Column settings are defined as:

- **UnLocked** – column is visible and can be updated by user
- **Locked** – column is visible and cannot be updated by user

  NOTE: Columns with formulas should be locked.
- **Hidden** – column is not visible to user

Additionally, columns can be set with **Filter** and/or **Sort** settings. Filter and Sort is defined as:

- **Filter** – puts a drop-down below the Column ID to filter by values in the column.

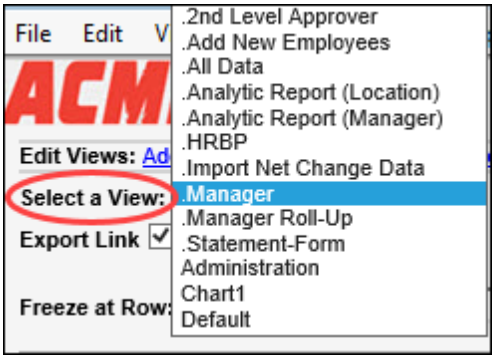


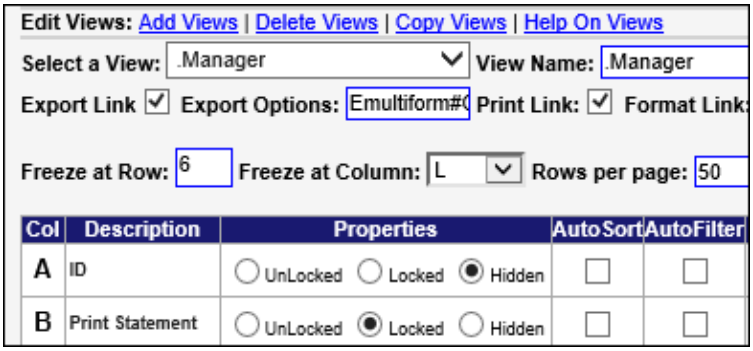
- **Sort** – puts a link on the Column ID that allows the column to be sorted in ascending or descending order.

Setting Up Columns in Views

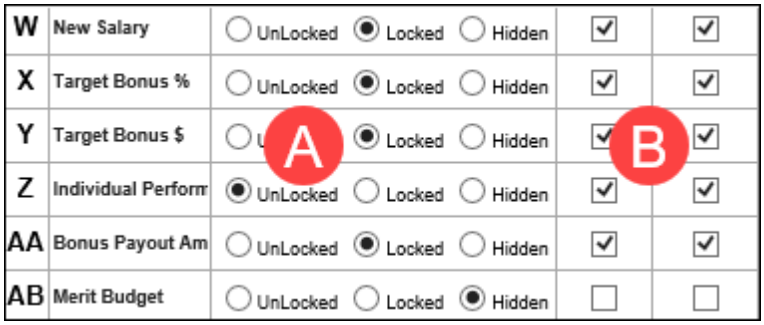
1. Login to SecureSheet.
2. Select the SecureSheet from your home page.
3. Click **Views**. This puts you into the view design.

4. Select the View you want to work with from the **Select a View** drop-down list to work with its settings.

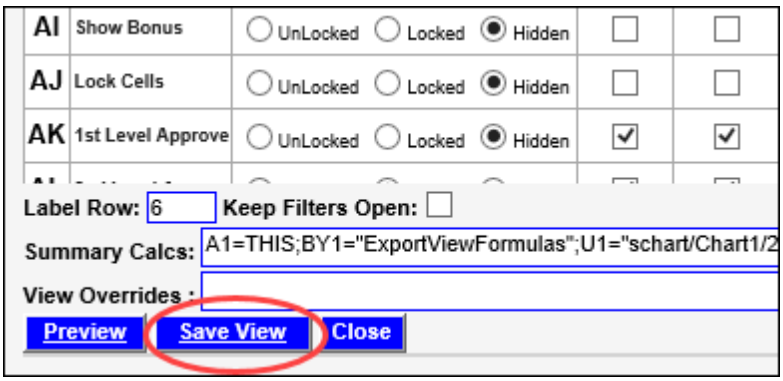




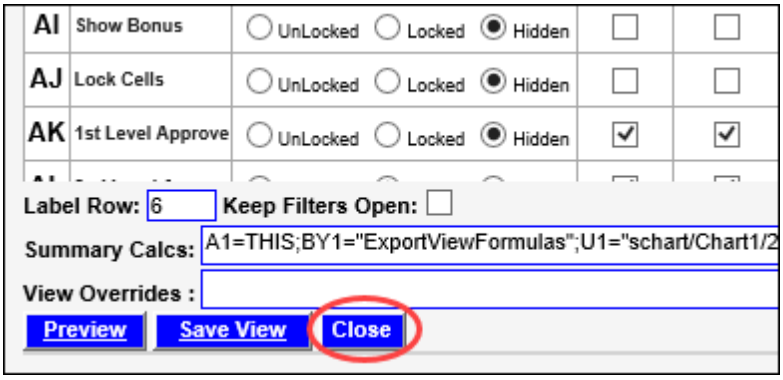
5. Scroll through the columns and adjust the settings as you desire for the users of the View you are working in:
   A. Set the columns to **UnLocked**, **Locked** or **Hidden**.
   B. Click the check box to turn on/off Auto Sort / Auto Filter.



6. Click **Save View** when you are done working with the column settings.



7. Click **Close** to exit the view design.



Set Maximum Rows and Columns for a View

Rows and columns can be increased to 10,000 cells as the maximum number of combined rows and columns allowed in any given view. Most often, users want to be able to scroll horizontally through all the columns they can see on one page.

These steps show how to find the maximum number of rows per page based on the visible columns (both locked and unlocked) in a specific view.

- The goal is for the user to be able to scroll horizontally through all the visible columns in the view on one page without having to navigate to additional columns using **Columns Next >>** and **<< Prev Columns**.
- The set-up in the example uses an .HRBP view.

Setting Maximum Rows and Columns for a View

1. Click Views to enter View design mode.
2. Select a View from the Select a View drop-down list. In the example, we are in the design mode for the .HRBP view.

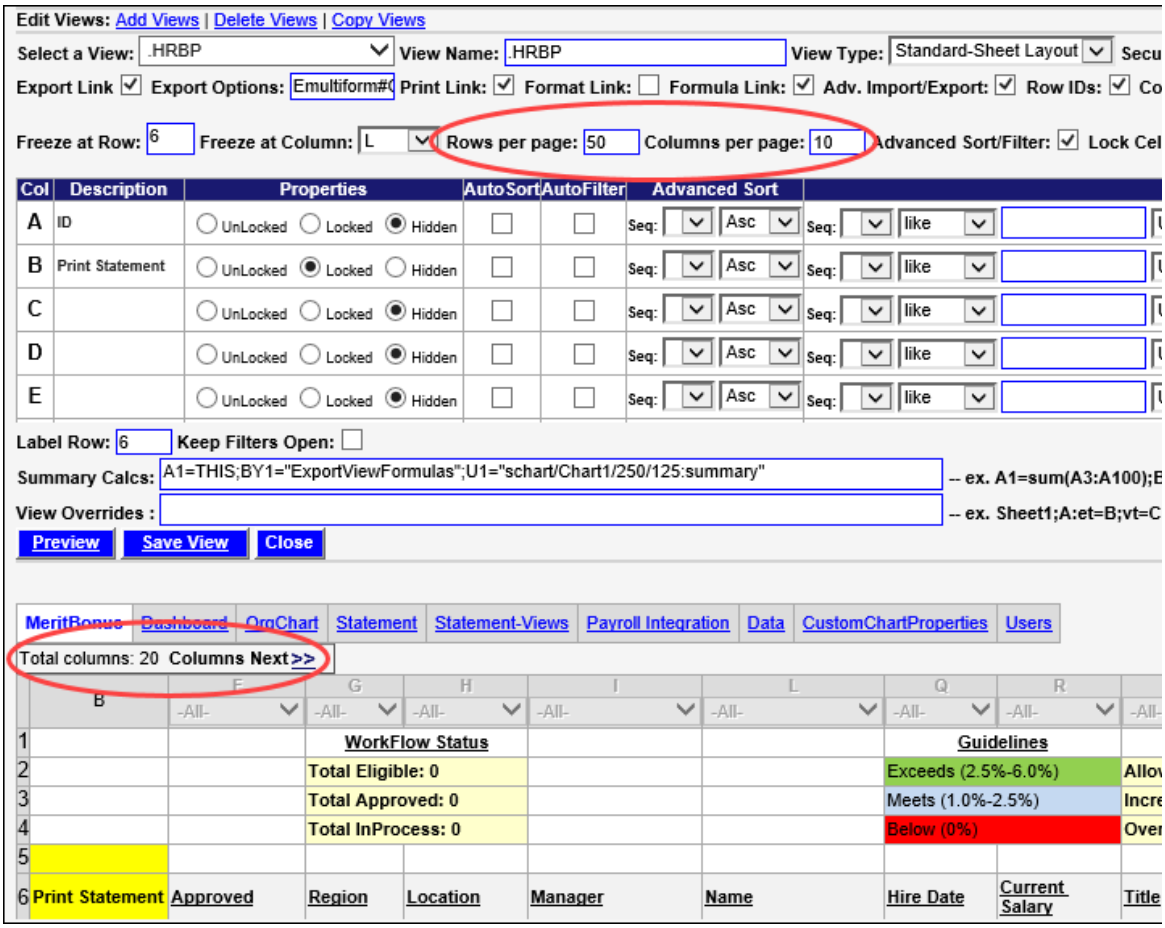
   NOTE: Rows per page is 50 and columns is 10, and there are 20 total columns set to be visible (Locked or UnLocked) in this view, which you can see below the tabs in the SecureSheet.

   NOTE: To find the Total Columns that are visible (Locked or UnLocked) in this view, set Columns per page to 1, Click Save View and you will see the Total Columns under the tab(s).
3. Divide the total possible cells (10,000) by the total columns (20) to find the maximum rows per page setting (500).
4. Update **Rows per page** to 500 and **Columns per page** to 20.
5. Click **Save View**.

NOTE: Setting the Columns per page to 20 also means that users will be able to scroll horizontally to see all the columns in the view (and not have to use the arrow navigation to get to the next set of columns).

6. Repeat Steps 2 - 5 in any view to set the maximum number of rows based on the visible columns.

   NOTE: If it is not priority to have users scroll horizontally through all visible columns on one page, increase the number of rows and then users will page through the columns.



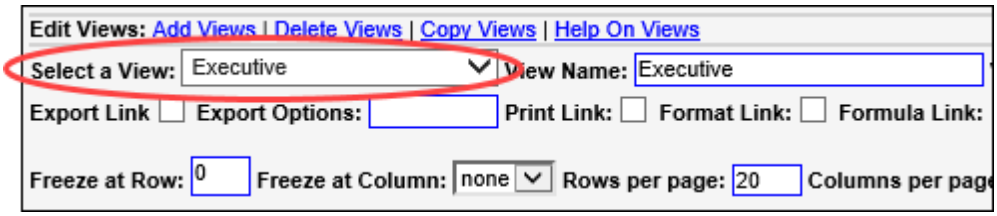
Properties of a View

You have to be a SecureSheet administrator to set up and maintain Views.

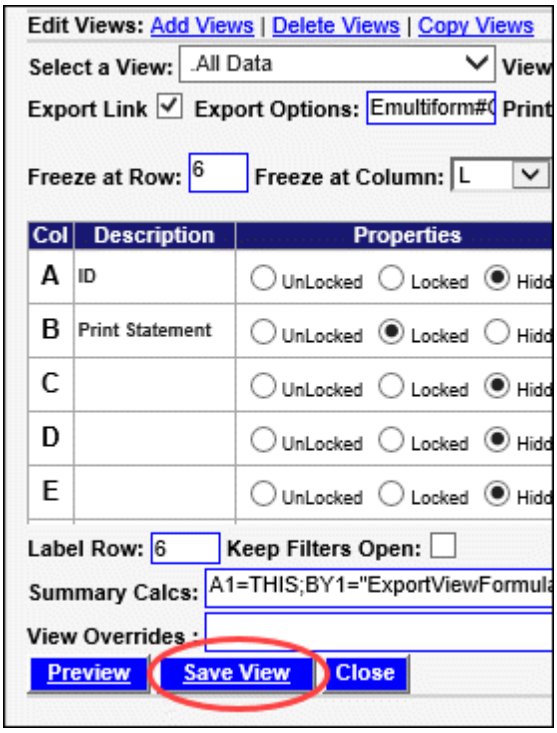
Setting Up View Properties

1. Login to SecureSheet.
2. Select the SecureSheet from your home page.
3. Click Views. This puts you into View design.

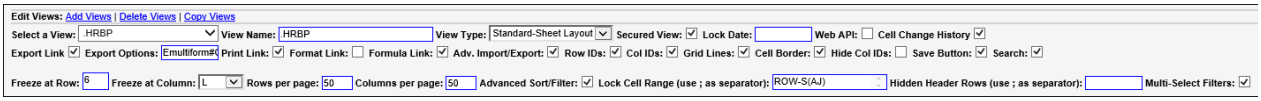
4. Select the View you want to work with from the **Select a View:** drop-down.



5. Set or modify the View Properties described below.
    - Some general guidelines for setting up new views:
        - Hide the last three columns from end user views
        - Turn on Cell Border on end user views – this puts a beveled edge on UnLocked columns and can be a helpful visual cue
        - Turned off the Advanced Import/Export checkbox from End User views (keep on in administrator views unless setting up a view to use for an Import Values by View)
        - Adjust each view to show the maximum rows possible based on visible columns
        - Set the Administration view to be able to see all columns in the SecureSheet
6. Click **Save View** to save all the view properties you updated.



View Properties

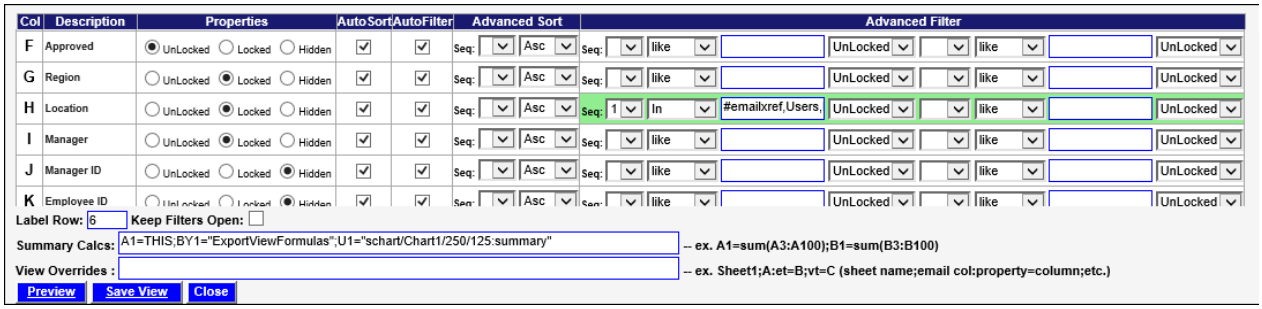


View Design Properties	Description
Add Views (link)	Click to create a new view from scratch.

View Design Properties	Description
Delete Views (link)	Click to delete an existing view.
Copy Views (link)	Click to copy an existing view and all of its property settings to a new view. Then, give the newly copied view a new name and edit the view properties as needed.
Select a View (drop-down)	The currently active view. The drop-down lists all existing views for a sheet in the SecureSheet. Select a view from the drop-down to work with a different view's design.
View Name	The name of the currently active view. The view name may be updated here at anytime, and it will be changed everywhere in SecureSheet.
View Type	Standard-Sheet Layout is the view type used most often. This layout is a typical spreadsheet view that displays rows and columns based on the sorting and filter criteria that are defined in the view. Most view requirements are met by using this view type. As an administrator, if you need to create additional view and have questions about your requirements, contact SecureSheet Support.
Secured View	All views are secured. This property cannot be updated.
Lock Date	May be set to control whether the view is either visible with all cells locked, or visible with only the header row displayed to all users shared to it. Once the current date is greater than or equal to the lock date, the view will be locked based on the Lock Date syntax used.
Web API	If a view is used in the Import Values by View process, this setting should turned on so that the view becomes available in the views to import to when you are importing values by view through the Import/Export tool.
Cell Change History	When this setting is on, you may access cell history from the view. And underlined 'H' will appear in any cell that has been changed. Clicking the 'H' shows the history of every change made, who made the change, when it was made, and the starting and ending values. History is always tracked even if this is not selected. Changes made outside SecureSheet are not tracked.
Export Link	Allows user to export the data they see from the view. An "Export View" link will be made visible at the top of view.
Export Options	Specify which formats are allowed to be exported from the view. The options are HTML (H), Excel (E), PDF (P). To allow more than one format, list each letter with no delimiter, for example, EP will provide optionsn to export in Excel and PDF formats. NOTE: If you need to export a view with formulas, refer to the Set Up a View to Export with Formulas instructions. NOTE: If you want to export a chart, you must set up the view to export in HTML format and then choose HTML format on the export. Charts will not appear in an export to Excel.
Print Link	Allows user to print screen in a new tab, putting a “Print Page” link in the

View Design Properties	Description
	navigation at the top right of the screen.
Format Link	Usually turned on only for views used by administrators. Puts a quick link to the administrator cell formatting tools.
Formula Link	Usually turned on only for views used by administrators. Puts a quick link to the administrator "Formula" view where all formulas may be seen and single cell formula updates may be made.
Advanced Import/Export	Usually turned on only for views used by SecureSheet administrators. Puts a shortcut link at the top of the view to the Import/Export tools that may also be accessed from the Admin Tasks drop-down on an administrator's home page.
Row IDs	Displays row numbers on the left side.
Column IDs	Displays column letters across the top.
Grid Lines	Shows grid lines across the data set. It is recommended that borders in the data rows are turned off when initially creating a SecureSheet from Excel and grid lines are turned on in SecureSheet views.
Cell Border	Shows a beveled edge around the unlocked cells in a view that may be edited by the end user.
Hide Column IDs	Hides all column letters except those columns with Auto Filter and/or Auto Sort settings turned on.
Save Button	Puts the red "Save Changes (Alt+S)" button on the view that allows users to save their changes. Defaults to on setting.
Search	Puts the "Search" button and search input field to its left at the top of the view to allow search functionality in the view.
Freeze at Row	Freezes the view at this row number when scrolling up or down. All rows above and including your specified row number are called header rows. Header rows will be displayed at the top of each page. Header rows are not included in sorts or filters. Header rows may be hidden per view.
Freeze at Column	Freezes the view at this column when scrolling left or right. The column you specify, as well as those to the left of this column, will display on the left side as you scroll or move through pages in the view. See Columns per page.
Rows per page	The number of rows, including header rows, that you want to display on each page of the view. The maximum number of cells per page is 6,000 (visible combined rows and columns). If there are more rows than this, a will display page number drop-down will be available for users to page through results. You may set maximum rows for a view depending on the visible columns being displayed on one page, or your users paging through columns.
Columns per page	Number of columns (including frozen columns) that you want shown in each page. The maximum number of cells per page is 6,000 (visible combined rows and columns). If you have want more rows displayed, you may need to have

View Design Properties	Description
	columns break across pages if you cannot get them all on one page. If there are more total visible columns than the number you enter here, SecureSheet will display left and right scroll arrows (<< >>) to page left and right.
Advanced Sort/Filter	Shows the Advanced Sort and Filter options for the view. When you turn this setting on, you can see the column descriptions, which are helpful when setting columns to locked, unlocked or hidden.
Lock Cell Range	Used in conjunction with advanced row locking. If your business process requires advanced row locking logic, SecureSheet Support will build the solution.
Hidden Header Rows	Hides header rows in the view. Hidden header rows may be specified per view. Enter row numbers delimited by a semicolon with no spaces in between, for example, 1;2;5;7.
Multi Select Filters	Allows multiple levels of sort and filters to be used by the end user in the view. Works based on the Auto Sort and Auto Filter settings defined in the view. Defaults to on setting.



View Column and Filter Settings	Description
Col	The column letter on the sheet.
Description	The column header from the row in your spreadsheet identified as the label row. The description will not appear until the label row is specified (beneath the filter settings table) and the view is saved.
Properties	Controls the visibility and ability to edit each column on the sheet by setting it to Locked, UnLocked, or Hidden.
Auto Sort	Puts an ascending and descending alphabetical sort on the column.
Auto Filter	Puts a drop-down filter on the column.
Advanced Sort	Defaults the view sorted by the advanced sort settings which may include up to three columns. Assign a sort priority sequence by selecting 1, 2, or 3 from the Seq drop-down. Select Asc for ascending sort order or Desc for descending sort order.

	NOTE: If advanced sort is set on a view, it will override the ability to auto sort in ascending or descending alphabetical order on any other columns in the view.
Advanced Filter	Fields used to design advanced security filters for the view. Up to three Advanced Filters may be set per view using criteria such as: like, =, <>, <, >, <=, >=, In, Not In, not like, compared to data values. There are additional SecureSheet special filters that may be applied to enable functionality beyond value comparisons.
Label Row	The row number that contains the column header. Once specified, the Description column in the View Properties will populate with the column headers. It is much easier to set columns to Locked, UnLocked, or Hidden when you can see the description (or at least the start of it).
Keep filters open	When using certain SecureSheet special filters, filter comparison criteria can be selected and a real-time query run against the data set with those criteria applied. When these filters are in use, filter criteria prompts will appear in the view. If you turn on Keep filters open, the prompts will remain on the screen after the query runs. If Keep filters open is off, users can select a 'Change Filters' link to return to the filters and re-run the query.
Summary Calcs	On most views, this will be set to A1=THIS to dynamically calculate all equations in the header rows. It is also used for setting up dynamic equations, labeling, and additional custom functionality depending on requirements.
View Overrides	Used for advanced dynamic view set up. If your process requires this type of logic, SecureSheet Support will build the solution.
Preview	Shows the changes you made to column settings. If you set more columns to Hidden, this is a good way to see how many columns your users will see in the view and what the header rows will look like, and may reveal some adjustments you might have to make to the header rows.
Save View	Click to save any changes you made to the view. Remember to click Save View for your changes to apply. If you click Close without clicking Save View, your changes will not be automatically saved.
Close	Closes you out of view design and takes you back to your default view. Any changes you made without saving will not be automatically saved.

Add an Approve or Submit All Link to a Column

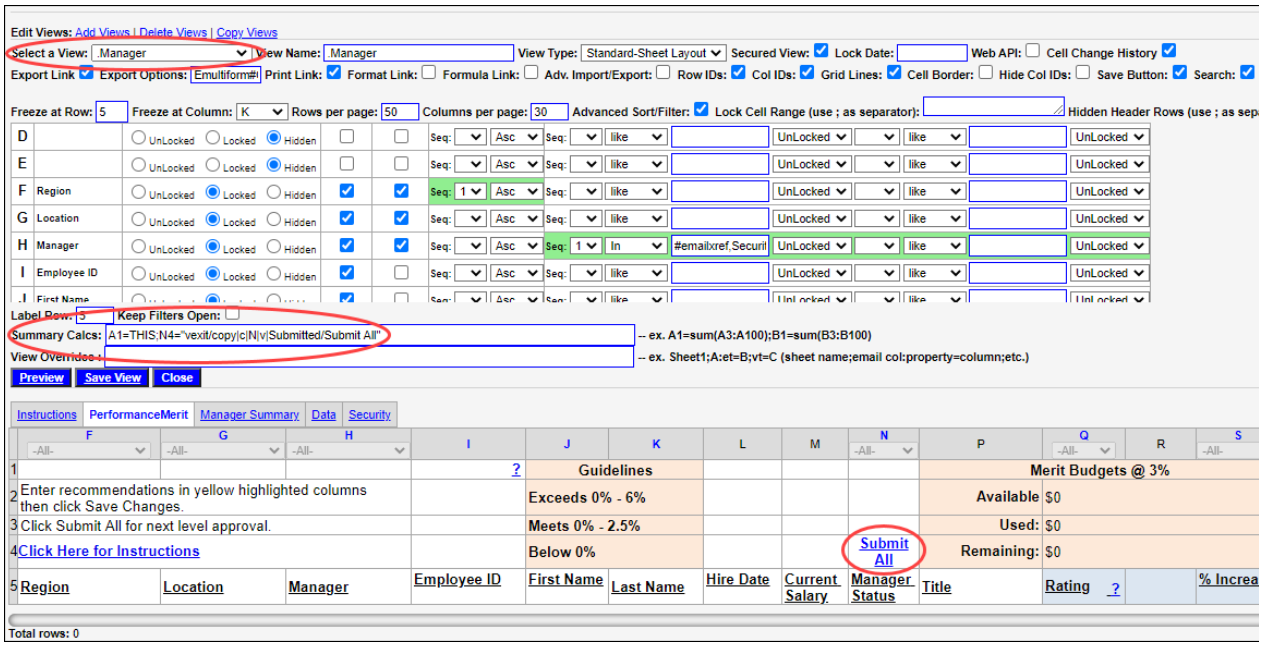
If your process includes you planning managers acknowledging submittal of their input, or approval of recommendations, at one or many levels, you may have status columns built into your structure. It may be convenient for your planning managers to have a "Submit All" or "Approve All" option, so that they can set the status for all rows in their view at the same time. The label can be whatever word(s) you set up in the link.

The "Submit All" link may be set up per view.

Add a "Submit All" Link to a Column

1. Click **Views** to enter View design mode.
2. Select the view you want to add the link to from the **View** drop-down list.
3. In the **Summary Calcs** field, add the following syntax to create the link: A1=THIS; N4="vexit/copy|c|N|v|Submitted/Submit All" where:
   - N4 and N are the specific cell where you want the link placed and N is the column that will be filled with the value you specify.
   - Submitted is the value that will populate the column when the user clicks the link is clicked.
   - Submit All is the link label that will appear in the cell you specified.
4. Click **Save View**.
5. Repeat steps 2 - 4 for each view where you want to add a link. The status column will change from view to view, so you will modify the syntax accordingly.

   Note: To prepare for supporting end users, add the "Submit All" link to your All Data (Edit) view, and also follow the steps to add a "Un-Submit All" link to your All Data (Edit) view.



Add an "Un-Submit All" Link to a Column for administrators

As a preventative step for the time when an end user clicks the "Submit All" column but was not ready and needs to reverse it, set up an Un-Submit All link on one of your administrator views (e.g., All Data (Edit)) so that you can take away the status in this scenario.

1. Click **Views** to enter View design mode.
2. Select the All Data (Edit) view from the **View** drop-down list.
3. In the Summary Calcs field, add the following to the syntax: A1=THIS; N4="vexit/copy|c|N|v|Submitted/Submit All";**N4="vexit/copy|c|N|v|/Un-Submit All"**
4. Click **Save View**.

Set Up Add Rows View

Once a SecureSheet is live, you may need to add rows if a team member(s) need to be included in your active planning cycle. As part of standard setup, your SecureSheet will have an Add Rows view that you use may use to easily add team members to SecureSheet.

When a SecureSheet is live, it is very important that any additional team members (i.e., new row(s) with employee data) are added online and not through an export/import with a different row count than what exists online in SecureSheet. If you import a different row count than what exists in SecureSheet, the SecureSheet cell history will be cleared at that point in time.

Create a data maintenance view called Add Rows. Characteristics of this view include:

- Only value-based columns are set to UnLocked.
- All columns with formulas must be Hidden.

When you save the new rows, SecureSheet will automatically copy down all the formulas from the template row to the new row(s) and any calculations in formula columns will take affect at that time.

Once the view is set up, you can:

- Enter values directly into the value-based columns and save the new row(s).
- Copy values from Excel and paste them into the view, then save the new row(s).

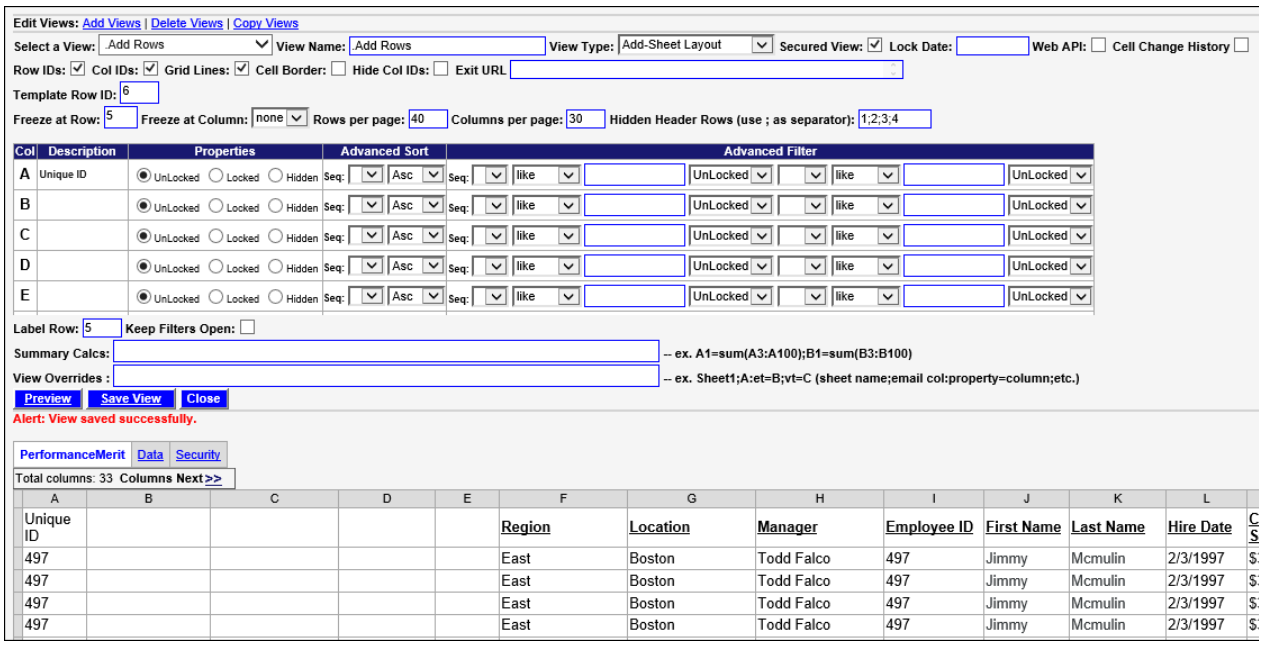
Notes on the number of rows in an Add Rows view:

- If you are adding rows to a tab where there are no existing data rows beyond the template row that has your formulas in it, there will only be one row in the Add Rows view. As rows are added, the number of rows available in the Add Rows view will increase (so you could copy/paste values for multiple new rows at once).
  - When this is your scenario (no existing data rows), the alternative approach to having multiple template rows available from the start is to designate several rows as "template" in your excel structure, and leave their values empty. They would always be in your SecureSheet exports as "template" rows, but these rows can be filtered out of the main end user views.
- If you already have many rows of data on the tab where you are adding new rows, the number of rows displayed in the view will equal what you have specified in the Add Rows view properties (Rows per page).

Set Up an Add Rows View

1. Have an exported copy of your SecureSheet available for reference. As you create this view, you will need to identify all of the value-based columns versus the columns that are driven by formulas.
2. Add a new view. Name it clearly so that you know what it will be used for, e.g., Add Rows.
3. Select **Add-Sheet Layout** from the **View Type:** drop-down.
4. Enter the first row of data in the **Template Row ID:** field.
5. List any header rows before your column label row in the **Hidden Header Rows:** field.
6. Click **Add View**.
7. Edit your new view.

8. Set the columns Properties to UnLocked or Hidden so you end up with only UnLocked value-based columns in the view accordingly:
    - Set every column that is driven by a formula to **Hidden**. Use your Excel file to check which columns are formula-driven.
    - Set every column that is extra/blank to **Hidden**.
    - Leave every column that is a value only set to **UnLocked**.
9. Click **Save View**.
    - In the preview section of the view, you should see the column labels for only value-based columns.
    - You will see the data values from the Template Row you identified for the view on several of the rows. This is okay.
10. Click **Close**.



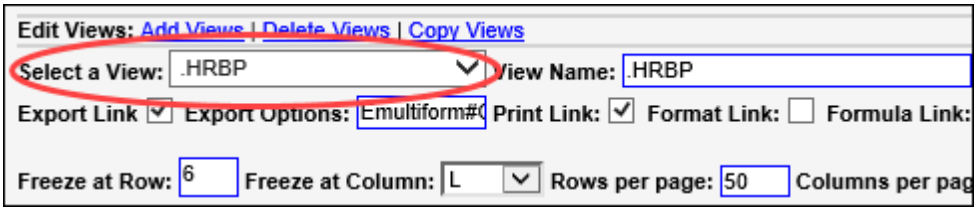
Special SecureSheet Filters for Views

There are special filters in SecureSheet that are used to set up security for and filtering in a view. These are set up in the Advanced Filter section and may be accessed when you edit a view.

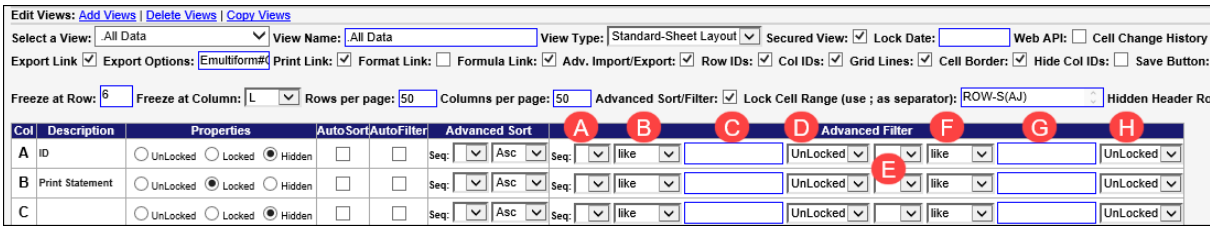
Special Filters in SecureSheet

1. Select the SecureSheet from your home page.
2. Click **Views**. This puts you into View design in the Edit mode.

3. Select the view you want to work with from the **Select a View:** drop-down.



4. Modify the advanced filters as needed.



A. Assign a **Seq**: to the advanced filter. Up to three (3) columns can have advanced filters in a view.

B. Select the condition to be used for the comparison , e.g., like, equals (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=), In, Not In, not like.

- If you have a list, IN or NOT IN. **In** will return an exact match of your comparison text only. This logic says something is **in** the list.
- If you have a partial string, LIKE or NOT LIKE. **Like** or **not like** assumes a wildcard prefix and suffix are assigned to the comparison text you enter. This logic looks for an exact match of the string found in the filter.
  - **Like** searches for a match inside the entire string, whereas **In** searches for a match on values separated by commas.
- Use **Not In** to exclude value(s) from a column.
- If you have a value as your comparison text, use a numeric operator (=, <=, >=, <>).

C. **Comparison text** is the value that you want to compare the column to. In addition to normal values such as characters, numbers and dates, there are several special SecureSheet comparison filters that may be used. They are always bracketed by the number sign (#).

D. **UnLocked/Locked** will lock or unlock the cells in this row if it is displayed by this filter comparison. This allows some rows to be displayed and the cells in the row unlocked for the user, while other rows may be displayed but all the cells locked for the user.

E. **Connector** is used if you are applying more than one filter for the column. Select and/or to use with the next set of criteria.

F. See Step 4B.

G. See Step 4C.

H. See Step 4D.

SecureSheet Comparison Filter	**Description**
#email#	Displays only those rows where the column contains the email address that matches the current login email address (as well as any blank rows). This is useful when you are trying to restrict the rows to a given user by their email address.
#now#	Applies the condition for the comparison against the current date/time. For example, "show me all rows where Column C is less than now".
#today#	Similar to #now#, except the comparison ignores time. Applies the condition for

	the comparison against the current date. For example, "show me all rows where column C is less than today's date (no time)".
#?#	This is a "dynamic filter" that will dynamically prompt the user for the filter values in the view. This allows the values of the filters to be chosen at run-time by the user.
#list#	Similar to #?# with the addition of a drop down list. This will dynamically prompt the user with a drop-down list to allow the user to select from existing values in the sheet for that specific column. This allows the value of the filters to be chosen at run- time by the user o When you use dynamic filters (#?# or #list#) in the **comparison text** field, the system will prompt the user for the filters at run time and use the label row (i.e., column header) to go get the descriptive text for the prompt (e.g., "Where Hire Date > ???"). o When you select dynamic filters (#?# or #list#) in the **comparison text** field, the system will prompt the user for the filters at run time and then display the rows that meet that criteria. o Normally, after the query is run, the filter panel will close and the user will have to select a "Change Filters" link to re-open the panel. To keep filters open after a query is run, turn on the Keep filters open setting.
#cell, cell address#	Applies the condition for the comparison against the cell value referenced. The cell address is used to find the value on the sheet that will be used in the filter. As an example, #cell,A5# would use the value in cell A5 for comparison in the filter.
#emailxref,name,email column,xref value column#	A comparison used to filter the rows of this sheet to the values in another sheet that are cross-referenced by email address. The email address of the person logged in will be used to find those filter values in the cross-referenced sheet. For example, a user may only be authorized to certain department codes and you only want to show rows to that user that have those department codes. • For example: **#emailxref,14;Users,A,B#** o Filter parameters are: ▪ #emailxref - this is the filter name and should not be changed. ▪ 14 - or the SecureSheetID being referenced (only needed when a separate SecureSheet is being reference, e.g., the Users tab in the Users-Views SecureSheet). ▪ name - this is the name of the tab in the SecureSheet (or a separate SecureSheet) that contains the cross-reference between email addresses and the corresponding valid values that they are able to see. NOTE: The sheet name will like be **Users** from your Users-Views SecureSheet, and you must enter the SecureSheet ID (which can be found in Organization Statistics) followed by a semi-colon, and then the tab name. ▪ email column - this is the Column ID (e.g., A, B, C …) in the

	cross reference sheet that contains the email address. ▪ xref value column - this is the Column ID (e.g., A, B, C …) in the cross reference sheet that contains the value to compare to. You can designate multiple values to the same email by entering multiple column numbers separated by a semi-colon (ex. "B;C;D"). Alternatively, in a security set-up column in your Users tab in your Users-Views SecureSheet, you can designate multiple values for a given email for a specific column by separating the value with 3 asterisks "***" in the same column. o Where: ▪ **14** is the SecureSheetID of the Users-Views SecureSheet ▪ **Users** is the name of the tab in the Users-Views SecureSheet being referenced ▪ **A** is the column in the Users tab that contains the user's email address ▪ **B** is the column in the Users tab that is being cross referenced to the main sheet (e.g., EEID to EEID where Column F - EEID in the main compensation sheet contains this cross reference filter in the Advanced Filters) **SCENARIO: When employee should not see themselves in a view** ● When you are filtering on a column that is not an EEID, like a Business Unit or a Department, and the user is not supposed to see themselves in the results, add a second filter to the view (first filter would be on Business Unit or Department) on the EEID column **Seq: x Not In emailxref,2;Users,A,B**. This will automatically exclude them from the list. NOTE: If they are not supposed to see colleagues, this will not solve for that scenario. You would need to use another filter to remove a department, for example, or add a helper column to your main data tab that lists exclusions and filter on that.
#emailsqlxref#	A comparison used to filter the rows of this sheet to two or more security conditions that are required. ● The specific security conditions need to be identified in a security column in the Users tab (in the Users-Views SecureSheet) with a similar syntax to these examples: o (O In ('Chicago','St. Louis','Detroit'))-cols-O o (O = 'Chicago' And S = 'FINANCE')-cols-O,S o (O In ('Chicago','St.Louis') And S = 'OPS')-O,S o (H = 'Active' AND P NOT IN ('Human','HR') AND CF <> 'A')-cols-H,P,CF ● And on the view that needs this security, put an advanced filter on Column A (typically) with the following syntax: **#emailsqlxref,2;Users,A,M#** o Where: ▪ **2** is the SecureSheetID of the Users-Views SecureSheet ▪ **Users** is the name of the tab in the Users-Views SecureSheet

	being referenced ▪ **A** is the column in the Users tab that contains the user's email address ▪ **M** is the column in the Users tab that contains the SQL with the security that needs to be applied SQL can also be used to show a roll-up view of a user's organization. The columns containing the organization structure in your main sheet will be referenced in the SQL statement (e.g., Col-AY = Manager Level 1, Col-AZ = Manager Level 2, etc.) in a security column the Users tab. ● The SQL needs to be identified in a security column in the Users tab (in the Users-Views SecureSheet) with similar syntax to this example: o ="(AY="'&E4&'" OR AZ="'&E4&'" OR BA="'&E4&'" OR BB="'&E4&'")-cols-AY,AZ,BA,BB" ▪ which will find the user name and return rows where the user name is found in any of the hierarchy columns (e.g., AY through BB in this example) ● And on the rollup view, add an advanced filter on Column A (typically) with the following syntax: **#emailsqlxref,2;Users,A,L#** o Where: ▪ **2** is the SecureSheetID of the Users-Views SecureSheet ▪ **Users** is the name of the tab in the Users-Views SecureSheet being referenced ▪ **A** is the column in the Users tab that contains the user's email address ▪ **L** is the column in the Users tab that contains the SQL with the rollup formula
#emailruxref#	An automatic rollup of the organization based on a 1:1 relationship of Employee:Manager. As long as a manager is also an employee in the main data sheet, applying an automatic rollup filter is possible. ● Add a rollup view, and on the column with the first line manager, set up an advanced filter with the following syntax: **#emailruxref,2;Users,A,B,G#** o Where: ▪ **2** is the SecureSheetID of the Users-Views SecureSheet ▪ **Users** is the name of the tab in the Users-Views SecureSheet being referenced ▪ **A** is the column in the Users tab that contains the user's email address ▪ **B** is the Manager ID column in the Users tab ▪ **G** is the column in the main data sheet with the EEID
DISTINCT DISTINCT_ROW	Command that can be used in Summary Calcs on a View to pull unique instances from a column and place them in cells in the header rows, that you can then use in other header calculations. ● The command only has to be placed in one cell and will then list the unique values vertically (DISTINCT) or horizontally (DISTINCT_ROW) for every unique

	instance. • On the **Summary Calcs:** line on the applicable View, use syntax K3=DISTINCT_ROW(F5:F2000) o For example: The budget allocation needs to be the sum of all budgets a budget owner is responsible for, e.g., a manager has multiple departments that roll up to their total budget. o Use DISTINCT_ROW to lookup the unique budget owners. Then, through a formula that references the unique value found, lookup the department budget. Then, sum each department budget that is a match to the budget owner in a Total Budget header calculation that is displayed in their view. • If you use DISTINCT, which will display vertically, and you only have 10 header rows but 20 unique instances, for example, only the first ten unique instances will be displayed. If you need to list each one, consider DISTINCT_ROW as an option. • The DISTINCT results may be displayed or hidden on a view depending on their desired use.

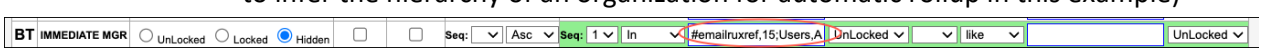
Additional Notes on Special Filters:

- When a filter cross-references a column on the main sheet to the Users tab in the Users-Views SecureSheet, the format needs to be consistent between the columns.
  - If there are leading zeros in the column on the main sheet that you are filtering on, the column in the Users-Views sheet also needs leading zeros.

Find the SecureSheet ID for Advanced Filters

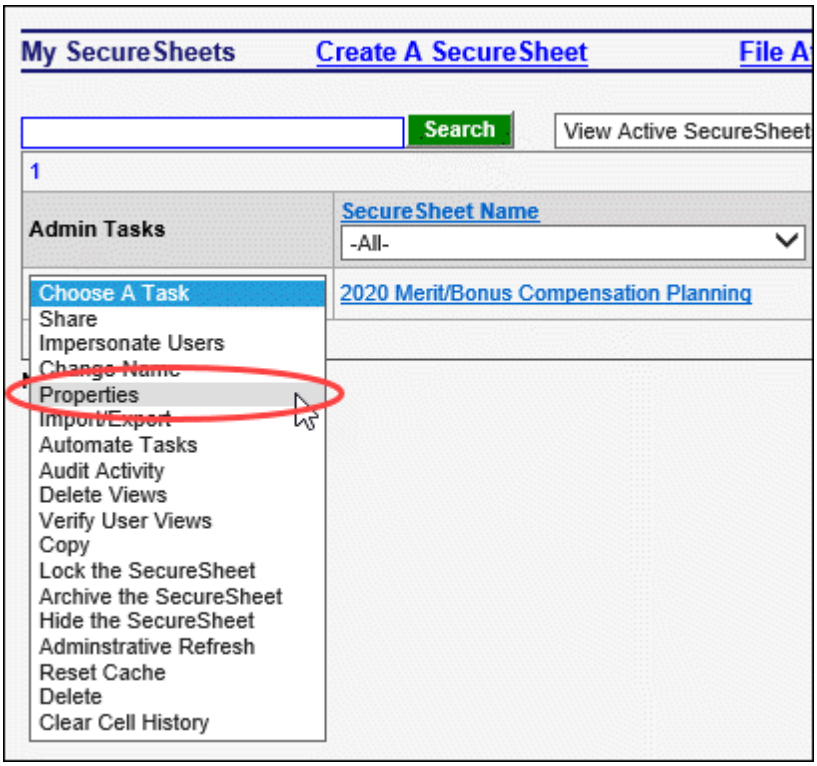
When you set up security cross references using the advanced filtering tools in SecureSheet, the syntax of some SecureSheet special filters includes the SecureSheet ID of your Users-Views SecureSheet.

- For example, using the #emailruxref advanced filter, the filter syntax would look like this: #emailruxref,15;Users,A,B,F#
  - Where:
    - **15** is the **SecureSheetID**
    - **Users** is the name of the tab in the Users-Views SecureSheet being referenced
    - **A** is the column in the Users tab that contains the user's email address
    - **B** is the column in the Users tab that is being cross referenced to the main sheet (e.g., EEID to EEID where Column F - EEID in the main sheet contains this cross reference filter)
    - **F** is the column that contains the EEID on the main tab of the SecureSheet (used to infer the hierarchy of an organization for automatic rollup in this example)

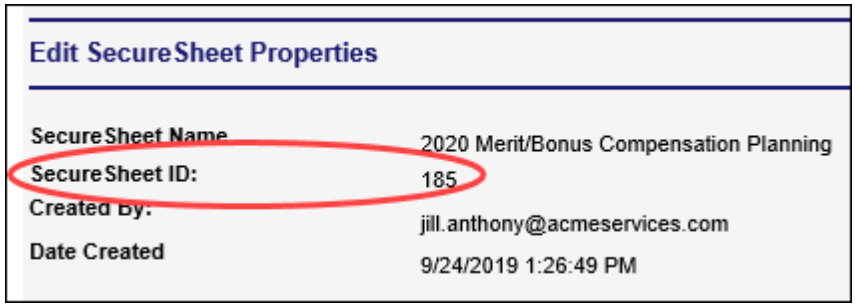


Finding the SecureSheet ID

1. Login to SecureSheet.
2. Select **Properties** from the **Admin Tasks** drop-down next to the SecureSheet whose ID you need to use in the filter.



3. You will see the **SecureSheet ID:** on the Properties page. Make note of it.



4. Click **<< Go Back** to return to your SecureSheet home page.

Set Up a View to Import Values or Paste Values Into

When you are managing data in a live SecureSheet and you need to add or update values in a column or a range of columns, you may set up a view to export and import into, or copy values from Excel and paste directly into SecureSheet in this view.

You set up a data maintenance view in your SecureSheet that is a subset of the columns in your entire SecureSheet. A data maintenance view contains columns that help you filter the data set to a specific group of rows that you need to update (e.g., for adding Performance Ratings by Region or Department), or it may be an update to all rows in your sheet (e.g., for adding Performance Ratings, or Market Data for your entire data set).

NOTE: You cannot use the Import Values by View tool to import formula-driven columns. Formula updates require using the export/import values/formulas/formats tools.

Once the view is set up, you may:

- Use the Export View feature and then the Import Values (by View) tool to import into the specific columns that you need to update. The Import Values (by View) tool can be accessed in the Import/Export Tools for administrators.
- Use this maintenance view directly to copy values from Excel and paste values into the cells.
- If this view will be used by end users, adjust end user permission in the Sharing tools to **Update/Import View Values** for end users who need to have the Import Values (by View) capability.

Set Up a View to Import Values Into

1. Add a new view. Name it clearly so that you know what it will be used for, e.g., Import Col-Q - Perf Rating.
2. Accept the default settings for the view and edit the other view properties accordingly:
    - Turn on the **Web API:** checkbox. This enables this view as an option in the Import Values (by View) tool.
    - Turn on the **Cell Border:** checkbox.
    - Set **Freeze at Row:** to the row with your column labels.
    - Set **Rows per page:** to as large a number as allowed (up to 6000 cells can be displayed on a page).
    - Set **Columns per page:** to include all the columns you have set to Locked or UnLocked in the view.
    - Turn on the **Advanced Sort/Filter:** checkbox.
    - List any header rows before your column label row in the **Hidden Header Rows:** box.
    - Set your **Label Row** to the same as your **Freeze at Row:** setting.
    - Set the **Summary Calcs:** box to **A1=THIS;Z1="ExportViewValues".**
      NOTE: "Z1" is variable. Use a header cell that is not visible in the view and before the last three audit columns in SecureSheet. If you put this syntax in a cell that is visible in the view, "ExportViewValues" will appear in that header column (because Summary Calcs override cell settings in the view).
    - If your exported file refers to a data validation list on another tab, use this syntax instead: **A1=THIS;Z1="ExportViewFormulas: Data"** where "Data" is the name of the tab with your data validation values.
3. Click **Add View**.
    - You can see the Column Descriptions after the view is saved.
    - If you selected too many rows/columns per page, you will see an alert and will have to adjust to get to the 6000 cell maximum per page.
4. Click **Edit Views**
5. Select your newly created view from the **Select a View** dropdown.
    - Turn on the **Export Link** checkbox.
    - Set **Export Options:** to **E**.

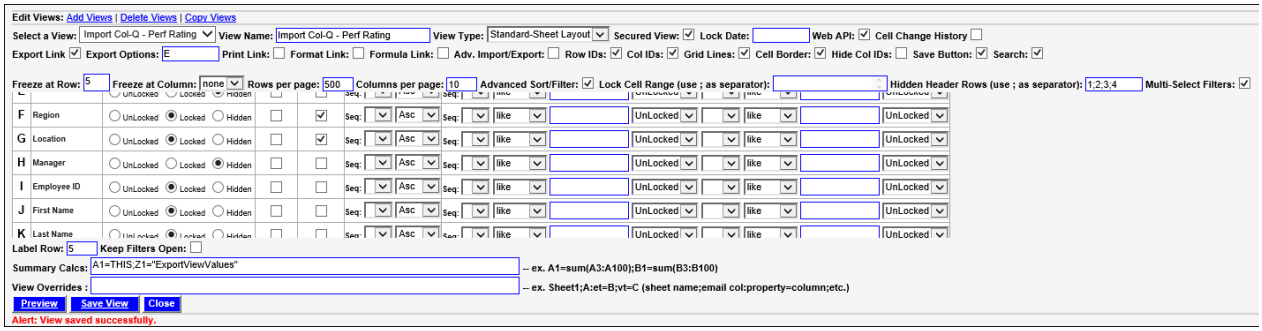
- Turn on the **Adv. Import/Export:** checkbox.

6. Set any columns to **Locked** that will help you filter your data set if you need (or may need) to update a subset of your rows, and, turn on the **Auto Filter** for the columns that will help you filter the data set.
7. Set any columns to **UnLocked** that you want to import or paste values into.
   NOTE: Always set Column A - Unique ID to **Locked**.
8. Set all other columns to **Hidden**.
9. Click **Save View**.
10. Follow the steps to export the view.
11. After making updates in Excel, you can Import Values (by View) or Copy and Paste Values into a Column or Range of Columns.

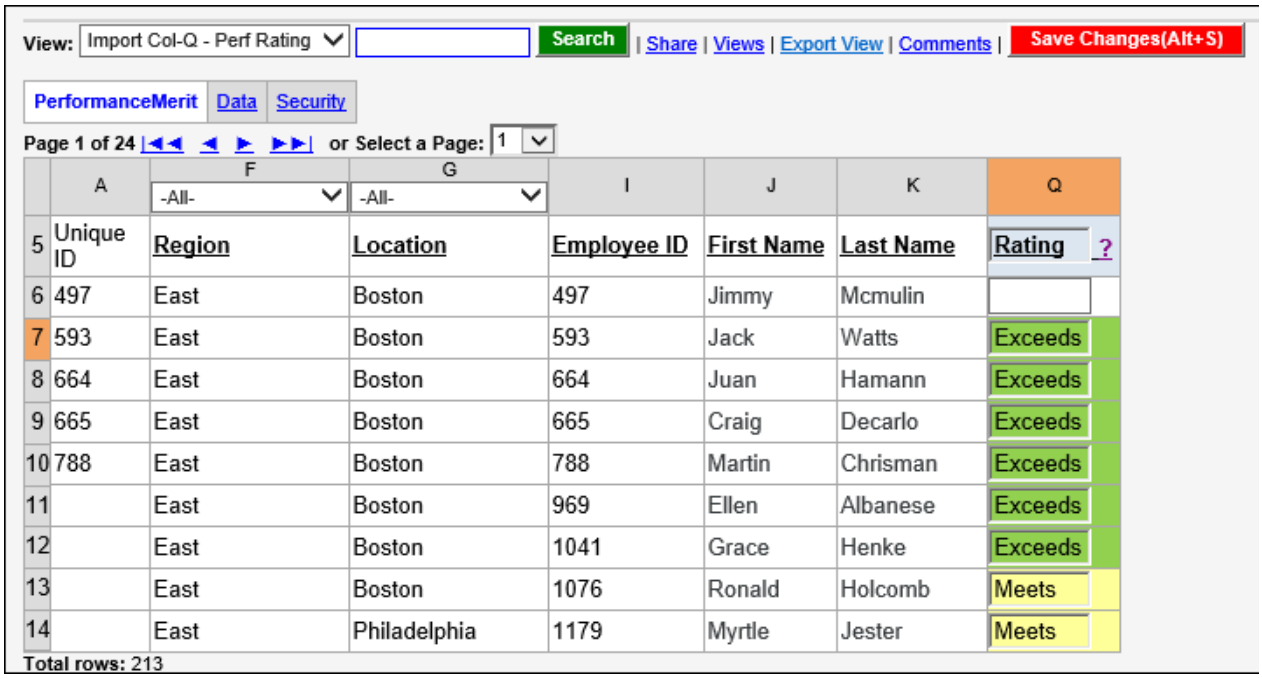
Notes about exporting then importing values by view:

- SecureSheet validates that the columns, column order, and headers, line up exactly on the import; this is why you export first to get your starting point, because it all comes directly from SecureSheet.
- If you need other filters in the view to help narrow the export, make those columns visible (locked) in the view.
- If you happen to unhide the columns in the exported Excel file that are hidden, they are empty, but they are there for positioning the import, so do not delete them.

Your **View Properties** will look something like this:



The **View** in this example looks like this:



Set Up a View to Export Values

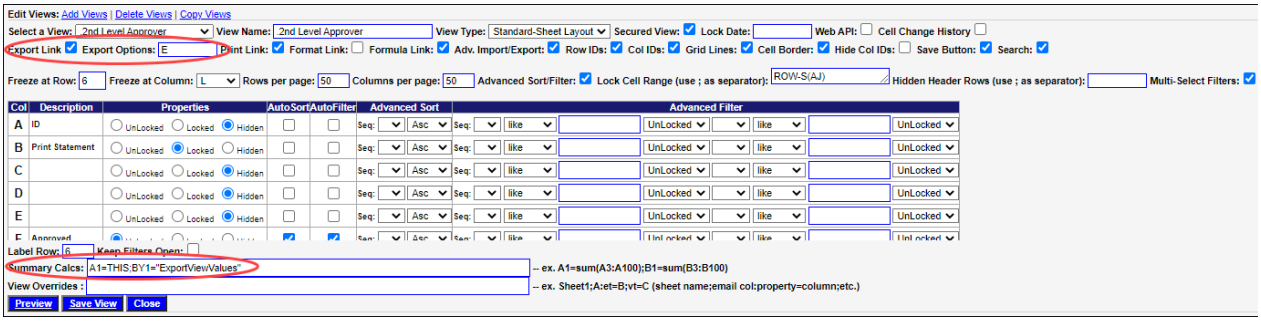
You can setup any view to export with values only or with formulas. The way this is setup depends on what you want managers to do offline in the export Excel file.

Follow these steps if you want to enable an end user to export their view from SecureSheet with values only (no formulas) in the exported file.

- If you want to enable a view to export with formulas, follow the steps to setup a view to export with formulas.

Set Up a View to Export with Values

1. Edit an existing View.
2. Turn on the **Export Link** checkbox.
3. Enter an E in the **Export Options:** box.
4. Turn on the **Advanced Sort/Filter** checkbox (so you can see the Summary Calcs line in the view setup).
5. Set the **Summary Calcs:** line to **A1=THIS;Z1="ExportViewValues"** (this exports values to Excel) or **A1=THIS;Z1="ExportViewValues*history*"** (this exports values and the cell history; useful if a specific use case for an end user requires the view of history in the exported Excel).
    - Note that "Z1" is variable. Use a header cell that is not visible in the view and before the last three audit columns in SecureSheet. If you put this syntax in a cell that is visible in the view, "ExportViewValues" will appear in that header column (because Summary Calcs override cell settings in the view).
6. Click **Save View**.



Set Up a View to Export with Formulas

You can setup any view to export with values only or with formulas. The way this is setup depends on what you want managers to do offline in the export Excel file. If you want users to be able to export from SecureSheet with formulas included in the export file, consider the following when choosing to enable this functionality:

- When a view exports with formulas from SecureSheet, the tabs that support calculations must also be exported so the calculations work properly in the exported file.
    - You identify which tabs are required for an exported SecureSheet to work offline.
    - If there are any columns that you do not want any values to be seen in the exported file, identify columns to be cleared in the export.
    - If there are formulas in columns that you want replaced with values, identify formula-based columns that need to export as values-only.

- If you want to enable a view to export with values only - no formulas - follow the steps to setup a view to export with values.

- If you want to users to import values back into SecureSheet, setup a view to import values (or paste values into). This capability needs to be permissioned to each user, which means that you can grant one or a few or all users permission to export from SecureSheet then import to SecureSheet.

    Note: Even though SecureSheet exports with formulas to Excel with passwords and allows administrators to set a second-layer password, there are ways to hack into an Excel password-protected file that someone who chooses to hack in can pursue. SecureSheet cannot guarantee the security of an Excel file. SecureSheet can guarantee security in SecureSheet, but once data leaves SecureSheet, SecureSheet has no control.

    Note: If you allow users to export a view with formulas and you want to stop any manipulation of columns in the exported excel file (i.e., columns cannot be reordered, additional columns cannot be added, etc.), set a sheet password that freezes the column structure on a view that exports with formulas. This can be set per SecureSheet.

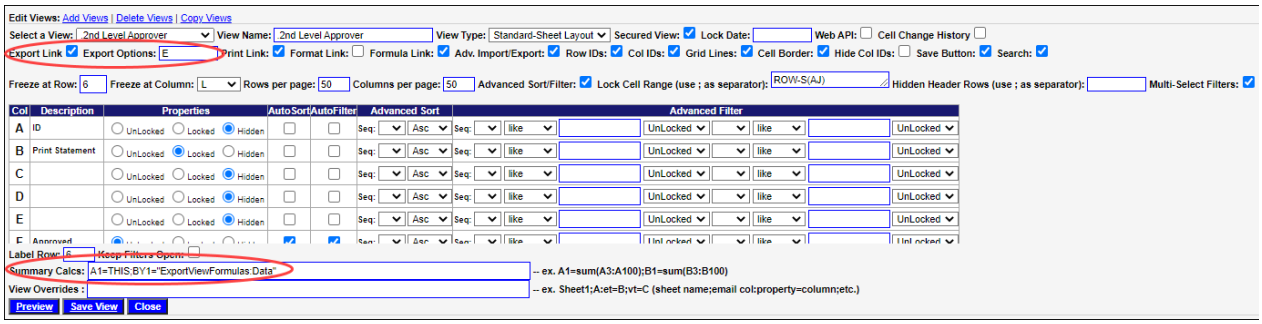
Set Up a View to Export with Formulas

1. Edit an existing View.
2. Set the **Summary Calcs:** box to **A1=THIS;Z1="ExportViewFormulas:Data"** where "Data" is the name of the tab with your data validation values or the values being cross-referenced in calculations on

your main tab.

NOTE: If you have more than one supporting tab that needs to export, use a comma in between tab names, e.g., Data,BudgetMatrix.

3. Turn on the **Export Link** checkbox.
4. Enter an E in the **Export Options:** box.
5. Click **Save View**.



Additional Options when Exporting with Formulas

You may have a scenario where you do not want all the formulas or values in the columns to be exported. You can control the export where formulas are replaced with values and value columns are cleared out, and you can define these settings by view.

- The standard export with formulas includes all columns, by design, as the hidden columns might influence the formulas.
- There is an option to remove data from columns as part of the export.
    - Provide a list of columns (A,B,C,etc...) and they can be set up such that when they export, those columns are empty (this applies to both value-only and formula driven columns).
    - You have to determine what columns impact the formulas so that it does not mess up managers as they are trying to export and work offline.
- There is an option to replace the formula with the value in the column on export.
    - Provide a list of columns (A,B,C,etc...) and they can be set up such that when they export, those columns only have values and not the formulas.
- Consider keeping data validations in an export and not clearing them as data validations can be helpful offline.

Syntax and Examples:

rcs - clear the VALUES out of these columns on export with formulas (NOTE: SecureSheet cannot control the hiding or unhiding of columns in an exported file)

- This would be used for columns that do not impact formulas AT ALL or columns that you do not want users to see
- Syntax example in **Summary Calcs:**
  DA1="ExportViewValues*rcs*A,B,C,D,E,F,G,J,K,L,M,N,O,P,Q,R,V,W,X,AA,AB,AC,AD,AE,AF,AG,AH,AI,AJ,AK,AO,AT,AU,AV,AW,AX,AY,BC,BD,BE,BF,BG,BS,BT,BU,BV,BW,BX,BY,BZ,CA,CB,CC,CD,CE,CF,CG,CH,CI,CJ,CK,CL,CM,CO,CP,CQ,CR,CS,CT,CU,CV,CW,CX,CY,CZ*rce*"

rcfs - replace the FORMULA with VALUE on export with formulas

- Syntax examples in **Summary Calcs:**
  A1=THIS;Z1="ExportViewFormulas*rcfs*AS,CA,DE,DF,DG,DH,DI,DJ,DK,DL,DM,DN,DO,DP,DQ,DR,DS,DT,DU,DV,DW,DX,DY,DZ,EA,EE,FN,FM,FO,FP*rcfe*"
  On a Manager view:
  A1=THIS;Z1="ExportViewFormulas:Data*rcs*A,B,C,D,E,I,K,M,P,R,T,AK,BD,BF,BG,BH*rce*"
  On an HRBP view:
  A1=THIS;Z1="ExportViewFormulas:Data*rcs*A,B,C,D,E,I,K,M,P,R,T,AK,BD,BH*rce*"

Combining clear values and replace formulas with values:

- **Summary Calcs:** syntax example:
  - A1=THIS;Z1="ExportViewFormulas:*rcfs*A,B*rcfe**rcs*C,D*rce*"
    - Where columns A and B are replaced with values and columns C and D are cleared out

Set Up a Summary View

You may have summary data in the header rows on your main spreadsheet tab or you may have a summary tab in your main spreadsheet. When the structure of summary data is more detailed, e.g., department level data that may be shown/hidden, it may be built on a summary tab. If the structure of summary data is at a high level, it may make sense to keep it in header rows on the main spreadsheet tab. Views may be created over summary data on the main spreadsheet tab or on a separate summary tab, and then shared to the users who need access to summary data.

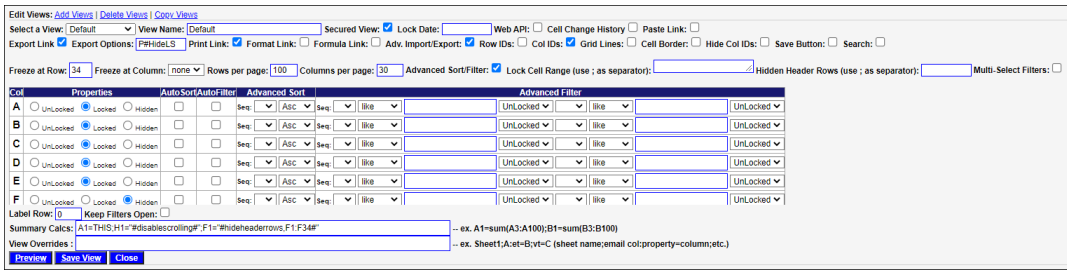
Set Up a Summary View on a Summary Tab

As long as all of the information on a summary tab is built as formulas (that reference your main data tab), you can create views of the summary data that assume the security that you designed in the views for your main tab.

On the Summary tab:

- Create a view that you want to share with managers on the Summary tab.
  View Name: .Budget Summary
  a. **Summary Calcs:** syntax: A1=THIS;B1="#sheetview:Associate Detail***.My Whole Org#";G1="#disablescrolling#";H1="#hideheaderrows,E1:E32#"
     Where:
     i. Associate Detail is the exact tab name on the main tab
     ii. .My Whole Org is the exact view name of the view on the main tab that the security references for this view on the Summary tab
     iii. disablescrolling removes scrolling from the view and allows the calculations to be made across all of the summary rows.
     iv. hideheaderrows encompasses the length of the data set and references the column where Show logic is built (i.e., if you want rows to be hidden based on the values that will return according to the logic of the view you are referencing on the main tab. For example, if a Summary row will return a zero value, you may choose to hide that row)
  b. Set **Freeze at Row:** to the last row of data on the Summary tab
  c. Set an **Advanced Filter** to accommodate the logic built in hideheaderrows, e.g.,

Column E filter set to 1 = Show UnLocked



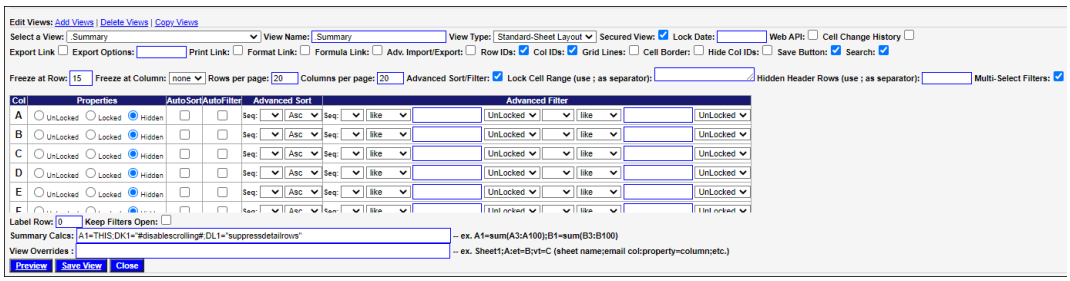
- On the Summary tab, build formula logic into the "Show" column to hideheaderrows as needed.
- Users will need to be shared to the Summary tab as needed.

Set Up a Summary View of Header Rows on the Main Tab

When summary information is at a higher level, sometimes it remains in a table(s) in the header rows in your main tab. You may create views of the summary data that suppress the detail rows so users see just the summary information when they access the summary view. Sometimes this summary data is in header rows to the right of the data set such that they are out of the way of the data; they can be anywhere in the header rows.

On the Main tab:

- Create a Summary view that you want to share with managers.
  View Name: .Summary
    a. **Summary Calcs:** syntax: A1=THIS;AM1="#disablescrolling#";AN1="suppressdetailrows"
       Where:
        i. disablescrolling removes scrolling from the view
        ii. suppressdetailrows hides the detail rows
        iii. AM1 and AN1 are varialbe; these are cells that are hidden in the view. Use any cell that will not display to the end user, that does not already contain a value or a formula, and that is before the last three columns in the SecureSheet (the audit columns).
    b. Set **Freeze at Row:** to your header row (the row with all of your column headings).
    c. Set all columns that do not contain summary calculations to Hidden.
    d. Set all columns that do contain summary calculations to Locked.



- Users will need to be shared to the Summary view as needed.

Data Management

Because data changes the minute you pull it, SecureSheet has tools available for you to manage data

before and after go-live – from complete data refreshes and updating specific column values to adding new employees. Using the various import/export capabilities in SecureSheet, SecureSheet administrators can accommodate and manage your changing data scenarios. Here are some considerations around preserving audit history :

Before go-live:

- Import/Export refreshes to your data as many times as desired or needed.
- When you import a different number of rows, or anything changes about the order of the rows you import, compared to the current data set in SecureSheet, the SecureSheet Cell History will be wiped clean from that point in time. This becomes highly important after go-live, but is rarely an issue before go-live.
- The main consideration for preserving cell history *after* go-live is to accommodate tracking the status of an employee in the structure of your SecureSheet *before* go-live.
    - For example, an Employee Status column can track "Termed" status. If an employee terminates during the open planning period, changing the employee status to "Termed" preserves the cell history.
        - If needed, employees with "Termed" status can be filtered out of manager views such that they do not hit the budget during the process.
- Another consideration is if you have a requirement around the sort order of your data. You may sort your data in any order desired. For on-going data management *after* go-live, if you want to export and resort data, import resorted data, and preserve cell history through the process, make the SecurSheet Support team aware of this requirement.
    - There is a property on your SecureSheet to sync cell history with each row's Unique ID on import, and this can be set by the SecureSheet Support team. The Unique ID is the value that is stored in Column A on the main tab in your SecureSheet.
- If you have minor data adjustments to make, you may update the data values in any value-based column in the **.All Data (Edit)** or the **Administration** views in SecureSheet. When you click Save Changes, your updates will be visible immediately.

After go-live:

- SecureSheet tracks all cell level data changes (before and after go-live). Think of SecureSheet as a big grid with a lock on each and every cell in the SecureSheet structure. This means that SecureSheet knows the cell based on its value and its position in the structure. If the *number of rows* or the *order of the rows* changes from what is in SecureSheet to something different contained in an import file, SecureSheet will infer a different number of rows or a different order of rows as a new file, and will wipe the cell history clean up to that point.
- In order to preserve cell history, the *number of rows* and the *order of the rows* **must** remain consistent through the planning cycle.
    - For on-going data management after go-live, if you want to export and resort data, import resorted data, and preserve cell history through the process, make the SecureSheet Support team aware of this requirement prior to go-live.
    - Any additional rows must be added online, not through an import with additional rows added to an Excel file and then imported.
- If an employee terms during the planning cycle, change the employee status column and do not delete the row. Rows must not be deleted during a planning cycle in order to preserve cell

history. If a row is deleted, cell history will be wiped clean.

- If you have minor data adjustments to make, you may update the data values in any value-based column in the **.All Data (Edit)** or the **Administration** views in SecureSheet. When you click Save Changes, your updates will be visible immediately.

Tools for managing data:

- Import and export changes before and after a SecureSheet is live
- Maintain a Live SecureSheet
- Set up a view to import or copy/paste values into for a column or a range of columns
- Add additional row(s) to an active SecureSheet
- Inserting a Column into a SecureSheet
- Audit SecureSheet activity
- Audit cell change history
- Working with Data Validations
- Copy and paste values into a column or range of columns
- Insert a tab
- Change the name of a tab
- Copy a tab
- Move a tab
- Delete a tab
- Verify Formulas
- End of a Cycle Process

Video Resources:

- Export from SecureSheet
- Import to SecureSheet
- Import Values by View
- Add Rows
- Insert or Delete Columns
- SecureSheet Site Audit
- SecureSheet-Specific Audit

Import and Export

Follow these instructions to use the Import/Export tool in SecureSheet to export and import updates to your values, formulas, and formats (e.g., changes to formulas, refreshing the data set).

Import and Export during Setup

During the initial setup of SecureSheet, after the structure of a SecureSheet has been loaded, it is important to use SecureSheet as the single source of truth for the latest and greatest version of your compensation sheet and your Users tab in your Users-Views SecureSheet.

- This means that any changes you need to make to the sheets offline always start with an export of the SecureSheet to work with the latest and greatest version.
- You update whatever you need to in Excel and then import your updates to SecureSheet.

Import and Export when a SecureSheet is Active

After go-live, when a SecureSheet is active - meaning end users are inputting data into SecureSheet - there are different ways to manage data changes in your live SecureSheet based on the scenarios that arise. There are additional tools available for data management in addition to the Import/Export tool.

- To update data values that may have changed or may have been missing at go-live (e.g., performance ratings for a group of employees greater than 1,000 rows), you may set up a view to import or paste values into, then use the Import Values by View tool.
- Scenarios may arise when the SecureSheet is live where a formula changes or a column order changes, and you must Lock the SecureSheet before you begin maintenance and use the Import/Export tool.

If you have questions about the best approach or tool to use to update your SecureSheet (while preserving your audit history and aiming for minimal maintenance time), contact the SecureSheet Support Team.

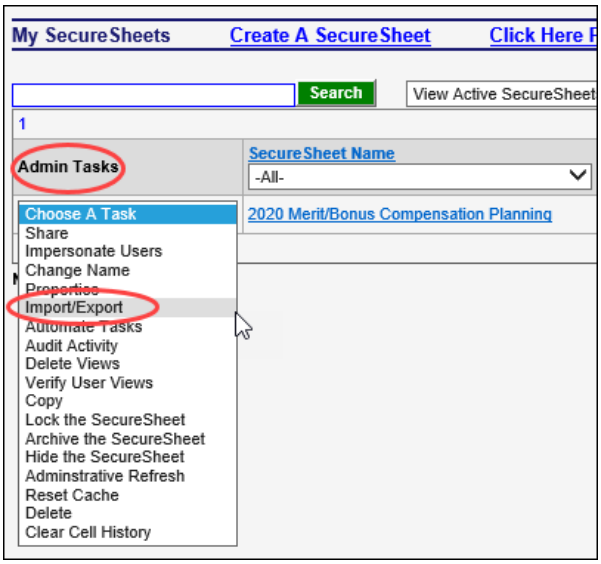
Video Resources:

- Export from SecureSheet
- Import to SecureSheet
- Import Values by View

Exporting a SecureSheet

NOTE: If your SecureSheet is live – meaning end users are entering data into it – refer to the Maintaining a Live SecureSheet instructions before you begin these steps.

1. Login to SecureSheet.
2. Select **Import/Export** from the **Admin Tasks** drop-down list next to the SecureSheet you want to export on your SecureSheet home page.

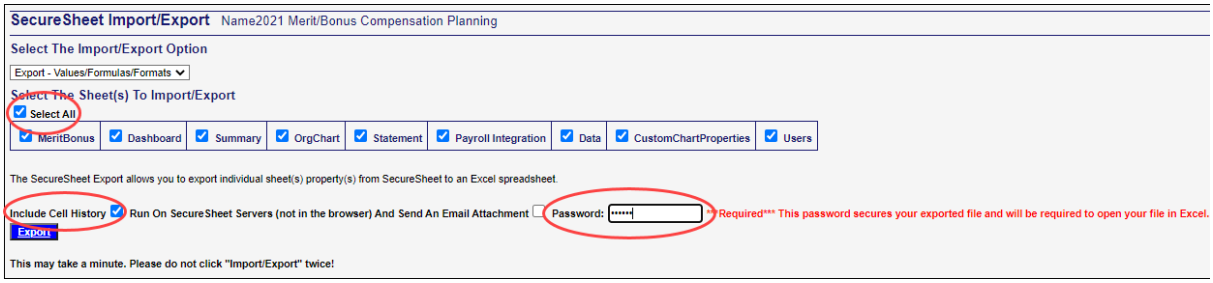


3. Select **Export – Values/Formulas/Formats**.

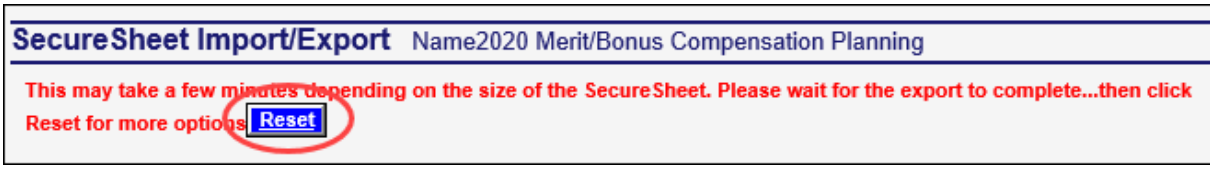
4. Click the **Select All** checkbox to export all of the tabs in the workbook.
    - Even if you are not planning to update all of the tabs in the workbook, export everything. You will ensure you have all the reference tabs that are used in VLOOKUPs or drop-down lists, for example.
5. Click the **Include Cell History** checkbox to export a tab containing all cell history up to the point of the export.
6. Secure your exported file by entering a password in the **Password** field. Remember the password you enter because it will be required to open your exported file in Excel.

    NOTE: Your SecureSheet settings may not require a password on export, so you may see an Optional message. You may enter a password regardless as a best practice to protect your exported data.
7. Click **Export** once.

    NOTE: It may take a few minutes for your file to export. Do not click Export twice.



8. When the export is complete, you will see the password pop-up in Excel where you can enter the password you entered before exporting from SecureSheet, and your file will open in Excel.
9. Click **Reset** to return to the Import/Export Options.



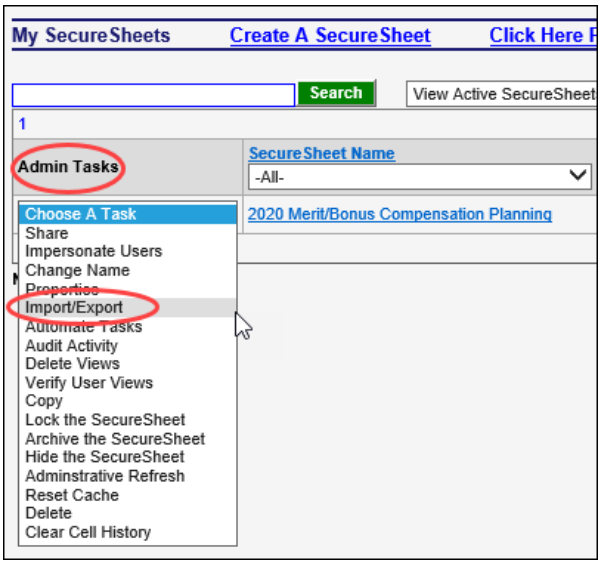
10. Click **<<Go Back** on the top right of your screen to return to your SecureSheet home page.

Importing to SecureSheet

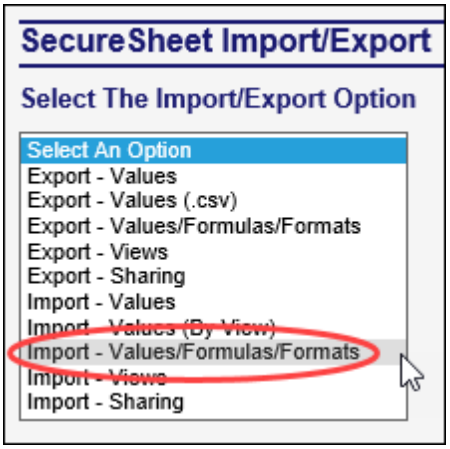
NOTE: If your SecureSheet is live – meaning end users are entering data into it – refer to the scenarios in Maintaining an Active SecureSheet instructions before beginning these steps.

NOTE: Take the password off the Excel file that you want to import and save the file without the password before selecting it to import into SecureSheet.

1. Login to SecureSheet.
2. Select **Import/Export** from the **Admin Tasks** drop-down list next to the SecureSheet you want to import updates to on your SecureSheet home page.



3. Select **Import – Values/Formulas/Formats**.



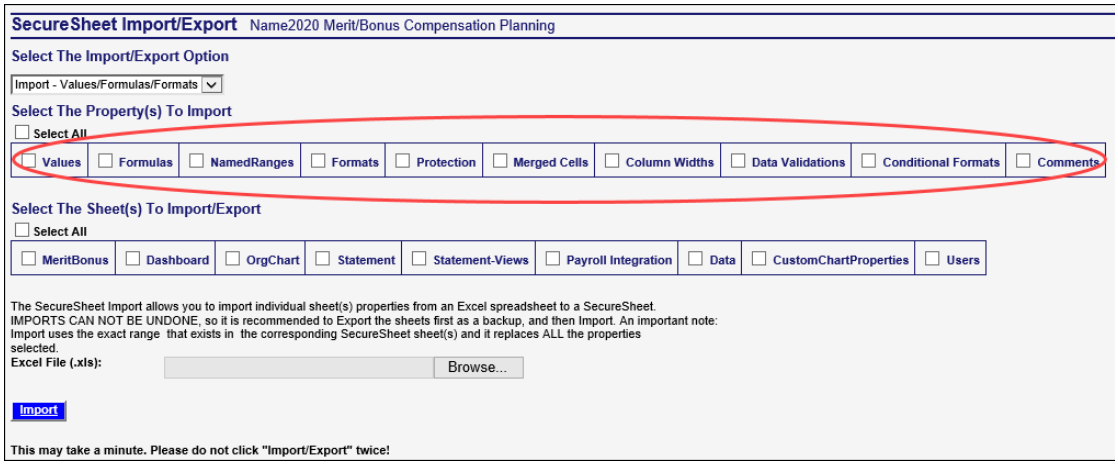
4. Check the **Property(s) to Import** from your source Excel file based on the updates you made. You do not need to import properties that have not changed. If you are importing Formulas, also import Values. If you need to import values only, consider using the Import Values by View tool (e.g., if you have 1,000 or more rows to update).

   - **Values** – Check if you updated value-based columns.
     - For example, you updated values on a supporting sheet used for VLOOKUPs or drop-down lists, or you updated value-based columns on your main sheet.
     - If you only check import values, you will not wipe out formulas.
     - If, for example, you have 15,000 rows in your SecureSheet and you need to update all 15,000 rows, import with the Values property checked.
   - **Formulas** – Check if you updated any formulas.
     - Formulas are never touched on Import *unless* you check the Formulas checkbox. CAUTION: Formulas come from the Excel file; if there are no formulas in the Excel file that you import AND you check the Formulas checkbox on the properties to import,

you will overwrite the cells with blanks.

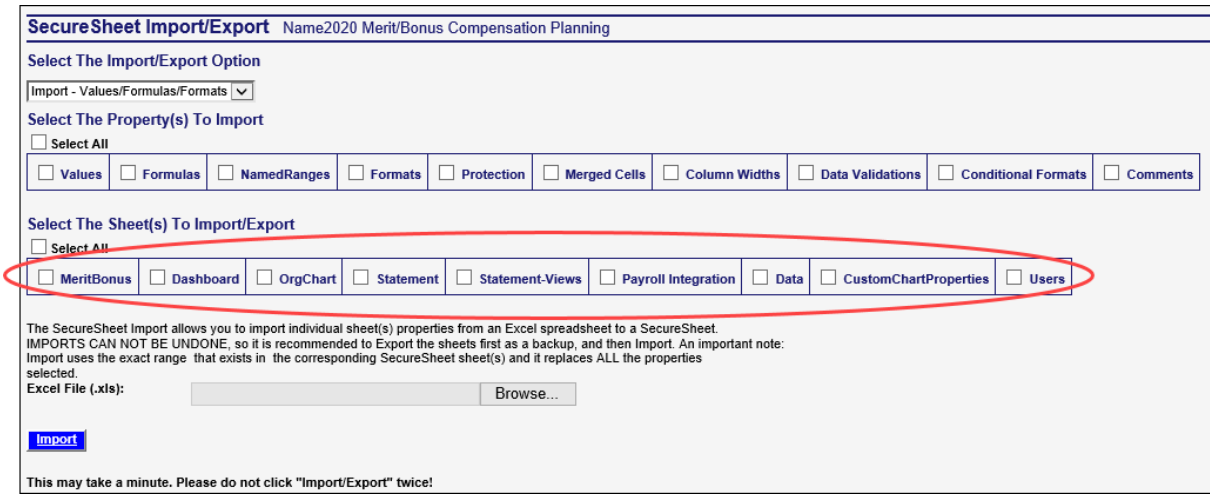
- When you import Formulas, this controls the rows that will be replaced in the existing SecureSheet. The import will have the exact number of rows in your source Excel file with Formulas checked. For example, if you exported a sheet with 1,000 rows, made changes and import a new sheet with only 300 rows, your SecureSheet will only have those 300 rows; you will lose 700 rows.
- Formulas come from the Excel file; if there are no formulas in the Excel file that you import and you click the Formulas checkbox on the properties to import, you will overwrite the formula-based cells with blanks.
- Importing formulas will cause a full recalc of your SecureSheet. This happens after you login to the sheet the first time after import and save a change. As a best practice, you may want to force this recalc (i.e., make it yourself) so your end users are not slowed down by it. After your import is complete, go to the Administration view, enter an "x" in a blank cell, click Save Changes, remove the "x", and click Save Changes again.

- **NamedRanges** – Rarely are Named Ranges used in SecureSheet. Check if you updated any Named Ranges used for drop-down lists or VLOOKUPs.
  - Named Ranges are difficult to manage and maintain when troubleshooting across multiple tabs in a workbook, for example, trying to identify where they are used. If used for anything other than drop-down lists or VLOOKUPS to static data, transition to discrete cell references (e.g., $A$2:$C$500) because these can be easily traced.
- **Formats** – Check if you updated any formatting properties (e.g., font, color, alignment, text wrap).
- **Protection** – Check if you updated any protection settings.
- **Merged Cells** – Check if you updated any merged cells (merge or unmerged).
- **Column Widths** – Check if you adjusted any column widths.
- **Data Validations** – Check if you updated any data validations.
- **Conditional Formats** – Check if you updated any conditional formatting.
- **Comments** – Check if you updated any comments that exist in the worksheet.
  - Comments will appear in their respective cell as a question mark and open in another browser window when the user clicks the question mark.



5. Select **only** the tabs in the workbook that you updated; those will be the only tabs updated through the import.

NOTE: If you did not update every tab, there is no reason to import every tab.



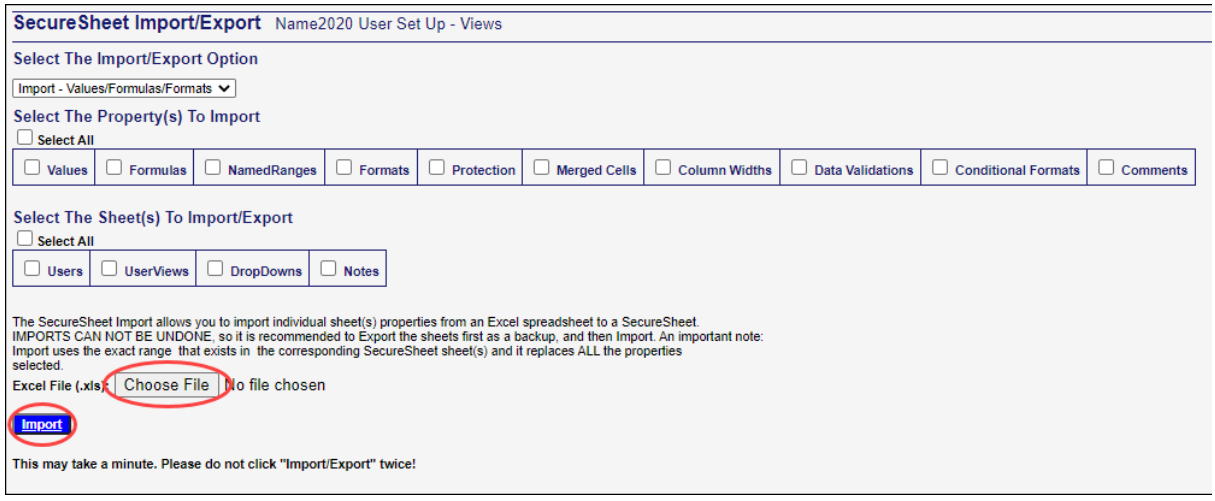
6. Click **Browse** and locate your Excel file for import.

   NOTE: It is very important that the name of the tab(s) in Excel **exactly** matches the name of the tab(s) in SecureSheet. The import will fail if the Excel is different than SecureSheet.

   NOTE: If you have a password on your Excel file, remove it before importing to SecureSheet or you will receive an import error.

7. Click **Import** once.

   NOTE: It may take a few minutes for your file to import. Do not click Import twice.



You will return to your imported sheet in SecureSheet when the import has finished.

8. Click the **Recalc** link.

   NOTE: This link should be in row 1 all the way over to the right in your SecureSheet. If you do not see a Recalc link, you may add it to a spare cell using this syntax: **vexit/recalc/Recalc**

   NOTE: When you import an update to one tab and not your entire spreadsheet, SecureSheet needs to recalculate to accommodate the updates you made in your import. Clicking this link is like making the first save to your SecureSheet, and, depending on the complexity of your model, it may take a moment for that first save. As an administrator, you want that first save to be done by you and not by your end users. If you have any questions about data imports, contact the SecureSheet Support Team.

Import/Export General Notes

- As a SecureSheet administrator for your organization, Export – Values/Formulas/Formats or Import – Values/Formula/Formats are the options you work with most often in the Import/Export tool.
- Do not use Import Values unless you are importing supporting tabs with static values used in VLOOKUPs or for drop-down lists.
- Do not attempt to use the import Views or import Sharing options without direction from the SecureSheet Support Team.
- **Export Views** exports the View design in column format. You may select this option if you want to reference an export of the View design. Follow the prompts that appear when you select this export option. In the Year 2 and Beyond process, you will export views to have an offline record of the view setup for the previous cycle.
- **Export Sharing** exports the Sharing set-up by user in column format. This is a helpful export to reference the Sharing profile of each user. Follow the prompts that appear when you select this export option. In the Year 2 and Beyond process, you export sharing to have an offline record of the sharing setup at the end of the previous cycle.
    - Sharing permissions in the exported sharing report are:
      Y = Update
      N = View Only
      A = SecureSheet Administrator
      R = Update/Import View Values

Maintain an Active SecureSheet

When end users are inputting data into SecureSheet after go-live, there are different ways to manage updates to your active SecureSheet based on the data management scenarios that may arise:

- Make a formula change to an entire column(s):
    1. Put the SecureSheet on Maintenance Lock and export the SecureSheet using the Import/Export tool
    2. Update the formula in Excel
    3. Import the formula update using the Import/Export tool, importing the Values and Formulas properties
    4. Take the SecureSheet off Maintenance Lock
- Update values in a column(s) that impacts all or many of the rows in SecureSheet (1,000 rows or more):
    1. Set up a view to copy/paste values into
    2. Use the Import Values by View tool to import updates
- Update values in a column(s) in a small subset of data (less than 1,000 rows) using one of these approaches:
    - Copy/paste into a column or range of columns

  - Create a view to copy/paste values into that includes just the columns you need to work with (hide all columns you don't need)
  - Use the All Data (Edit) or Administration view to make value updates to any value-based column which will be visible immediately after you click Save Changes

- Update Named Ranges, Cell Formatting, Merged Cells, Column Widths, Data Validations, and Conditional Formats:
  - May be done online while SecureSheet is live (in the Active section of your site) and end users are accessing it
  - Follow the links to the applicable instructions

- Insert a column(s) in your existing SecureSheet structure:
  1. Put the SecureSheet on Maintenance Lock
  2. Insert a column in the existing SecureSheet structure online
  3. Export Values/Formulas/Formats from SecureSheet using the Import/Export tool
  4. Add formula/data values into the newly inserted column
  5. Import the change using the Import/Export tool, importing the Values, Formulas and Formats properties
  6. Update the newly inserted column setting in each view to locked, unlocked, or hidden
  7. Protect the header cells for the newly inserted columns (you will see the beveled edge around them if they are not protected)
  8. Take the SecureSheet off Maintenance Lock

  CAUTION: If you have a structural change to your column order, ensure that the structural change is made in SecureSheet **first** and **before** you try to import that change. This will preserve all of the existing column settings in all of the defined views.

- Insert an additional tab to your existing SecureSheet structure (e.g., for summary information):
  1. Insert an additional tab online
  2. Change the tab name - this must be the same tab name as the Excel file that you will be importing to SecureSheet
  3. Import the contents of the additional tab
  4. Create views over the additional tab as needed
  5. Share other administrators or end users to the new tab as needed

- Add additional rows to your SecureSheet:
  - Use the Add Rows view to add any incremental employees to the data set after go-live.
  - The row count on imported files must stay the same throughout a cycle to preserve cell history. Do not export, add additional rows and import a different row count than you exported; if you do, you will lose cell history.

- Immediately lock out all end users from making updates in SecureSheet:
  - Select **Lock the SecureSheet** from the Admin Tasks dropdown. End users will not be able to save updates.
  - When ready for users to continue with udpate access, select **Unlock the SecureSheet** from the Admin Tasks dropdown.

If you have questions about the best approach or tool to use to update your SecureSheet (while preserving your audit history and aiming for minimal maintenance time), contact the SecureSheet Support Team.

Add Rows to an Active SecureSheet

After your SecureSheet is Active and end users are working with it, you may need to add new rows to account for additions to your workforce. If you are concerned about preserving cell history through the planning cycle, any new rows **must** be added online in SecureSheet through an Add Rows view and not imported from Excel.

> **NOTE:** IF you add (or delete) rows in an exported Excel file, and you import that file to SecureSheet, the cell history to that point will be wiped clean with that import.

If not already set up, you will need to set up an Add Rows view to add new employees to your SecureSheet.

Video: Add Rows

Adding New Rows to an Active SecureSheet

1. Login to SecureSheet.
2. Select **Add Rows** from your **View:** drop-down.
3. Enter the values for any of the columns in the view for one or multiple rows.
   > **NOTE:** These are only the value-based columns in your SecureSheet. No formulas should be added here.
4. Click **Save New Rows**.
5. The new row(s) will be appended to the last row in your SecureSheet. All of the formulas will be copied to the newly added row(s) and any dependent calculations will be run.
6. Select an **All Data** view to from your **View:** drop-down to see your newly added row(s).

Lock a SecureSheet

When a SecureSheet is active, if a scenario arises where you need to make a formula change across an entire column(s) or you need to make a value change to a large subset of your rows (over 1,000 rows), you do not want users to enter data while you are making these kind of updates. Locking the SecureSheet first lets users know that the system is under maintenance.

There are two types of locking, Lock the SecureSheet and Maintenance Lock. Follow these instructions to lock your SecureSheet before making updates using the Import/Export tool or the Import Values by View tool.

You may lock a SecureSheet at the end of a planning cycle, which puts the data in a "view only" mode for end users until licenses expire.

Lock the SecureSheet Versus Maintenance Lock

- Lock the SecureSheet prevents any non-administrator user from saving changes to a

SecureSheet. Users will not be kicked out when you Lock a SecureSheet, but if they were in the system at the time you locked, they will not be able to save any of their current work.

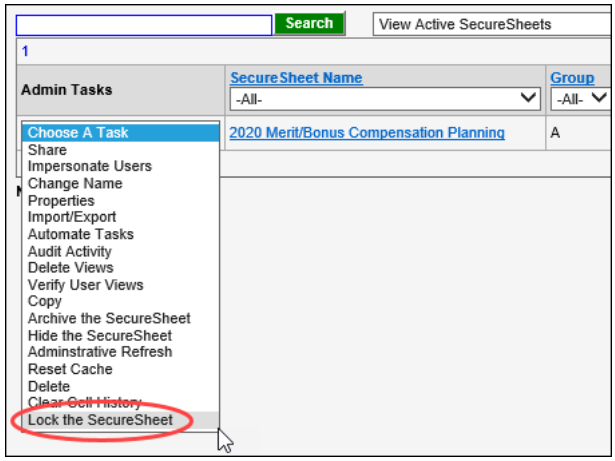
- Recommended if you are closing off access for users to make updates to the SecureSheet but still want them to see the information in the SecureSheet during the maintenance period.
- Users see an indicator within SecureSheet that the sheet is in administrator Update Mode.
- When a cycle is complete, locking the SecureSheet is a way to put every view in a "view only" mode.

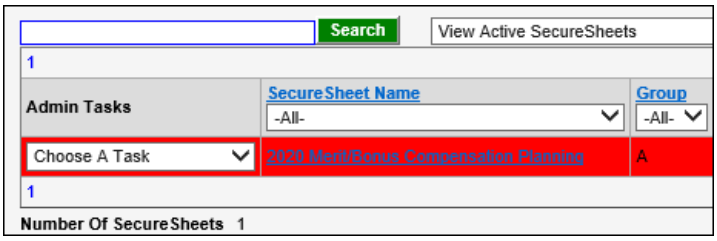
- Maintenance Lock prevents any non-administrator user from accessing a SecureSheet. Users are kicked-out if they are logged in when you put a SecureSheet on Maintenance Lock. The main purpose of Maintenance Lock is to avoid user contention where they are trying to enter data while significant administrative updates are being made.
  - Recommended for an active sheet with active users and you need to do general maintenance such as updating a formula across a column(s), change the structure by adding/deleting a column(s), or inserting a tab(s) in the SecureSheet.
  - Use Maintenance Lock on Hidden SecureSheets as a visual indicator to other administrators that the sheet is under maintenance. If for any reason multiple administrators need to import/export, tightly coordinate activity and use the Maintenance Lock to visually indicate when the sheet is in maintenance. You want to avoid multiple administrators overwriting each other's updates during the same maintenance period.

Locking a SecureSheet

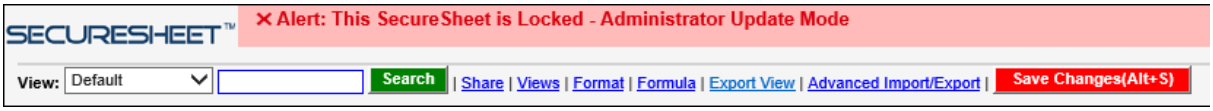
1. Select **Lock the SecureSheet** from the **Admin Tasks** drop-down next to the SecureSheet you want to lock on your SecureSheet home page. The locked SecureSheet is highlighted in red.

   NOTE: You will only see this option when a SecureSheet is in the Active section of your site.





Users see this message if they go into a SecureSheet when it is Locked:

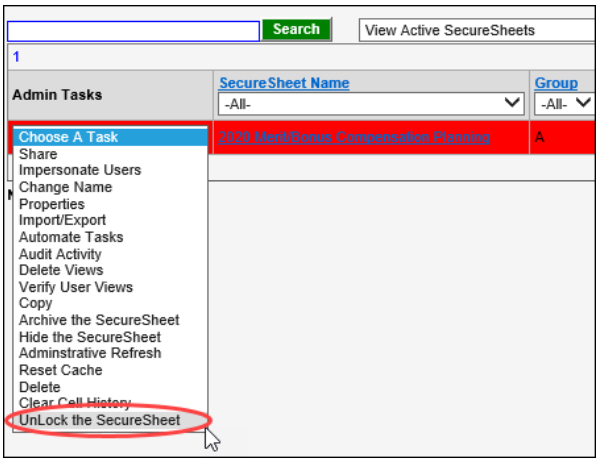


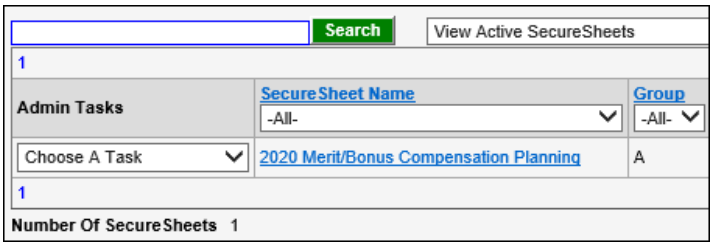
2. If you are updating data, begin your update process using the **Import/Export** tool or the **Import Values by View** tool.

UnLocking a Locked SecureSheet

When your offline updates are complete and you are ready for users to work in the SecureSheet again, UnLock it.

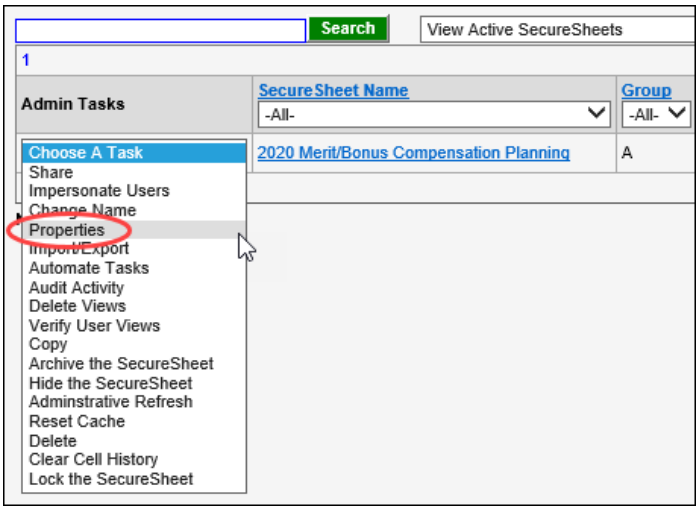
1. Select **UnLock the SecureSheet** from the **Admin Tasks** drop-down next to the SecureSheet you want to unlock on your SecureSheet home page. The SecureSheet is no longer highlighted in red. Users no longer see the locked alert when they access the SecureSheet.



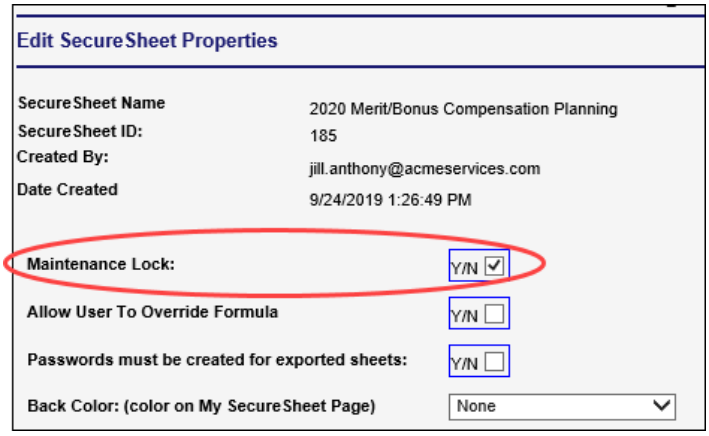


Putting a SecureSheet on Maintenance Lock

1. Select **Properties** from the **Admin Tasks** drop-down next to the SecureSheet you want to lock users from being able to access while you make updates to it.



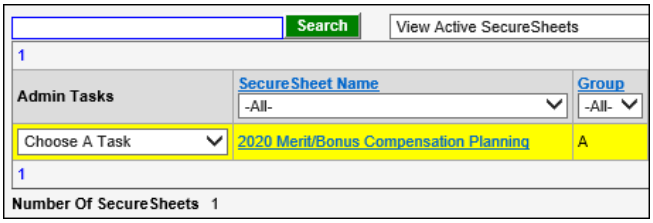
2. Check the **Maintenance Lock** check box on the Edit SecureSheet Properties page.



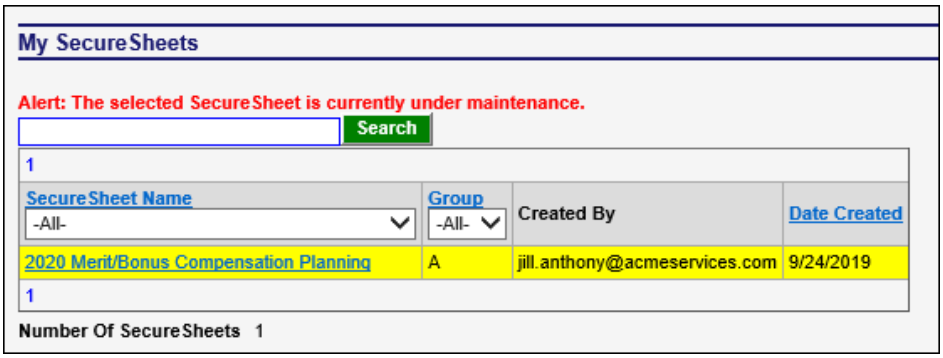
3. Scroll to the bottom of the properties list and click Apply to turn on Maintenance Lock.

4. Click the **Go Back** link to return to your SecureSheet home page.

5. The SecureSheet you put on Maintenance Lock is highlighted in yellow.



6. Users see this message if they try to access a SecureSheet when it is in Maintenance Lock:



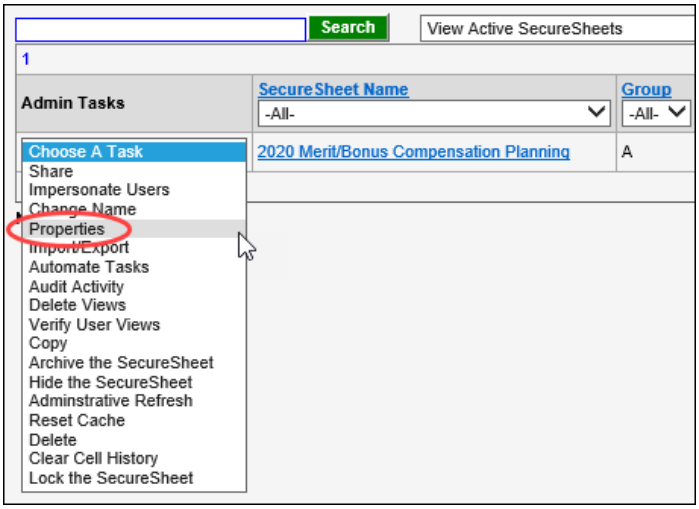
7. Begin your update process using the Import/Export tool or the Import Values by View tool.

   NOTE: Only administrators can go into a SecureSheet when it is in Maintenance Lock, so there is not an alert at the top of the screen when you go into a SecureSheet that is in Maintenance Lock.

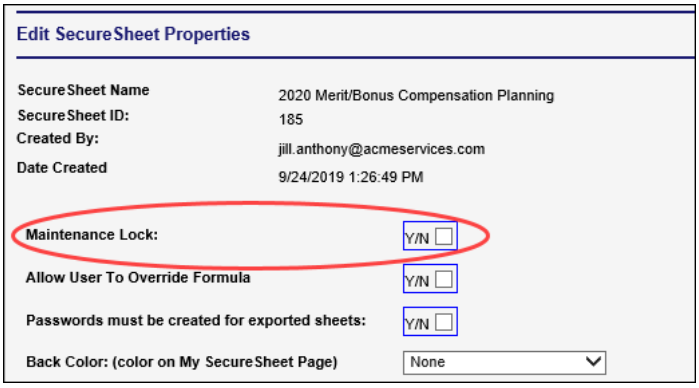
Taking a SecureSheet Off Maintenance Lock

When your offline updates are complete and you are ready for users to access the SecureSheet again, take it off Maintenance Lock.

1. Select **Properties** from the **Admin Tasks** drop-down next to the SecureSheet you want to take off Maintenance Lock.



2. Uncheck the **Maintenance Lock** check box on the Edit SecureSheet Properties page.



3. Scroll to the bottom of the properties list and click Apply to take off Maintenance Lock.

4. Click the **Go Back** link to return to your SecureSheet home page.

The SecureSheet you put on Maintenance Lock is no longer highlighted in yellow. Users will be able to access the SecureSheet.

General Notes on Locking

- For scenarios when updating data with the **Import Values by View** tool:
  - When an end user is using Import Values by View that may have been set up for them, there is no need to lock when the import is being done on a user-by-user basis.
  - When an administrator is using Import Values by View to make value updates across an entire SecureSheet, possible contention with end users making updates and the value update for all rows can present an issue. Put the SecureSheet on Maintenance Lock in this scenario.
- When selectively updating data, you do not need to lock. Here are some scenarios:
  - Using an **.All Data** view to make small data updates.
  - Using a View that was set up for the Import Values by View tool. Data may be directly entered into a view or copied/pasted into a view that has been set up with this functionality.
- Anytime you are making formula changes or structural changes to an active SecureSheet, put the sheet on Maintenance Lock and refer to the instructions for Maintaining a Live SecureSheet.

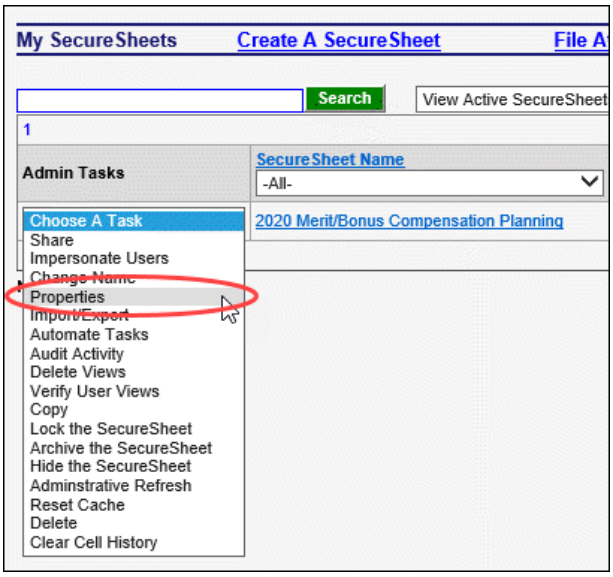
Allow Users to Override Formulas

If you need to allow users to override formula-driven columns in SecureSheet, you must set the property that allows them to override formulas. This is set per SecureSheet.

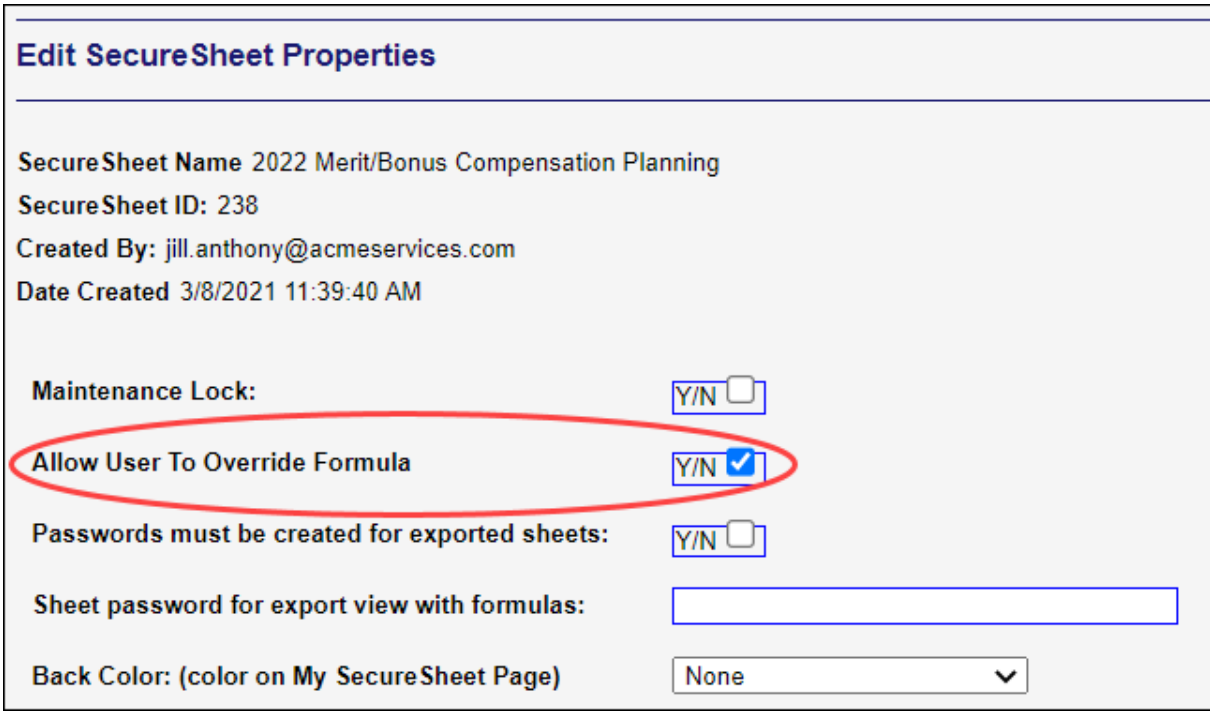
A formula-driven column must be unlocked in a view and this property must be turned on in order for the user to be allowed to enter data in a formula-drive column.

Allow Users to Override Formulas

1. Select **Properties** from the Admin Tasks drop-down.



2. Click the **Allow User to Override Formula** checkbox.



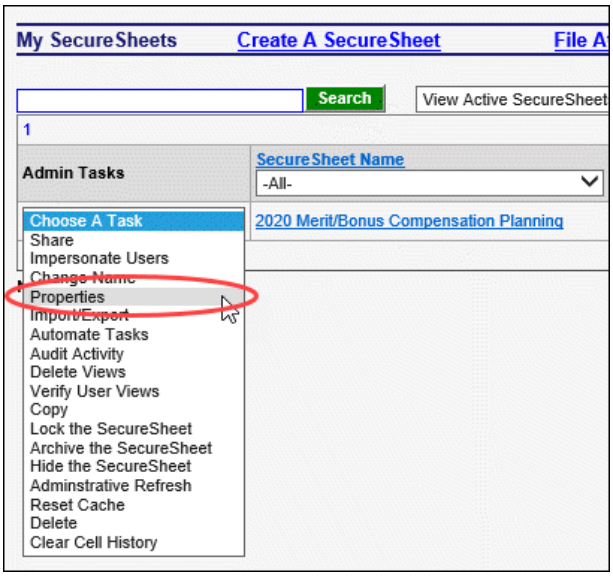
3. Click **Apply**.
4. Click**<< Go Back**. Users will be allowed to override formulas in unlocked columns in the view(s) they have permission to access.

Require a Password from Users on Exports

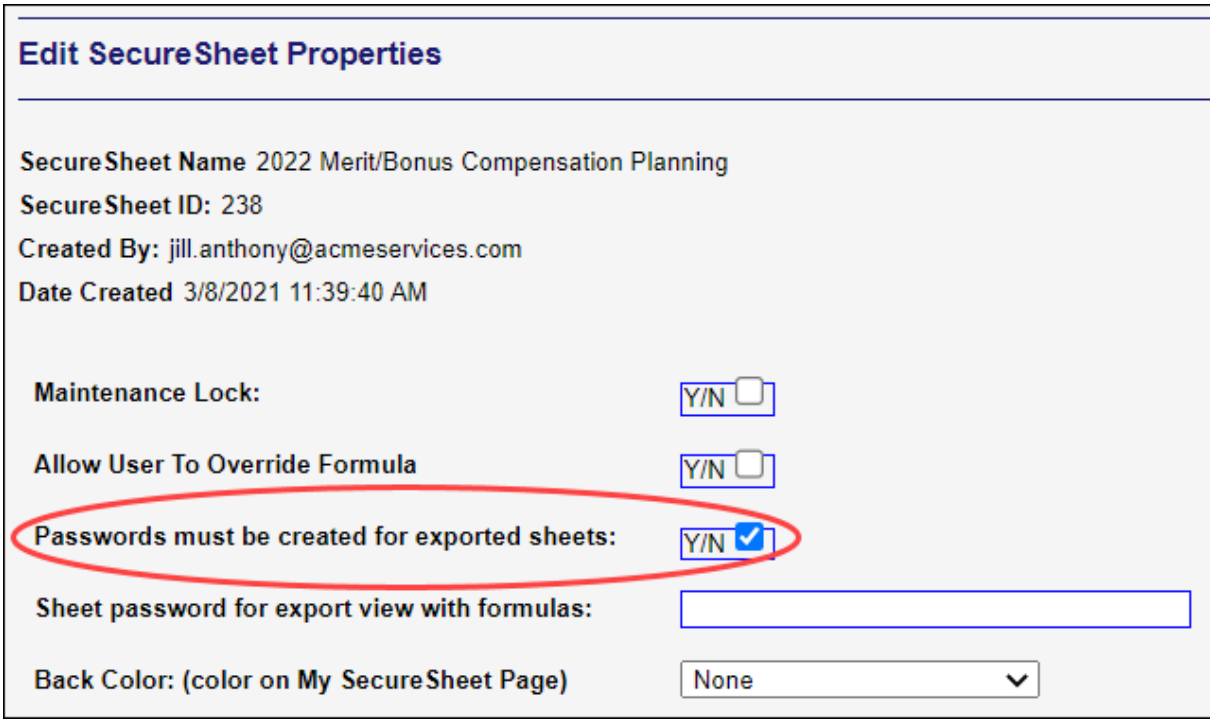
You may choose if passwords are required when you and any users export from SecureSheet.

Require a Password from Users on Exports from SecureSheet

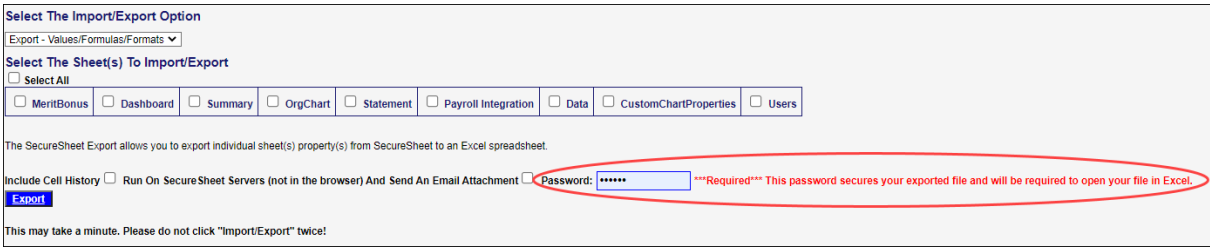
1. Select **Properties** from the Admin Tasks drop-down.



2. If not already checked, turn on the **Passwords must be created for exported sheets:**checkbox.



3. Click **Apply**.
4. Click**<< Go Back**. Passwords will be required when you export from SecureSheet.



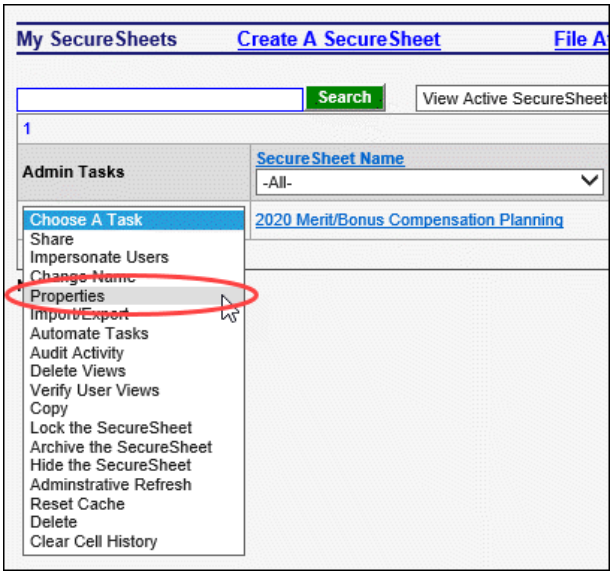
Set Sheet Password for Views that Export with Formulas

If you allow users to export a view with formulas and you want to stop any manipulation of columns in the exported excel file (i.e., columns cannot be reordered, additional columns cannot be added, etc.), you must set a sheet password that freezes the column structure on a view that exports with formulas. This can be set per SecureSheet.

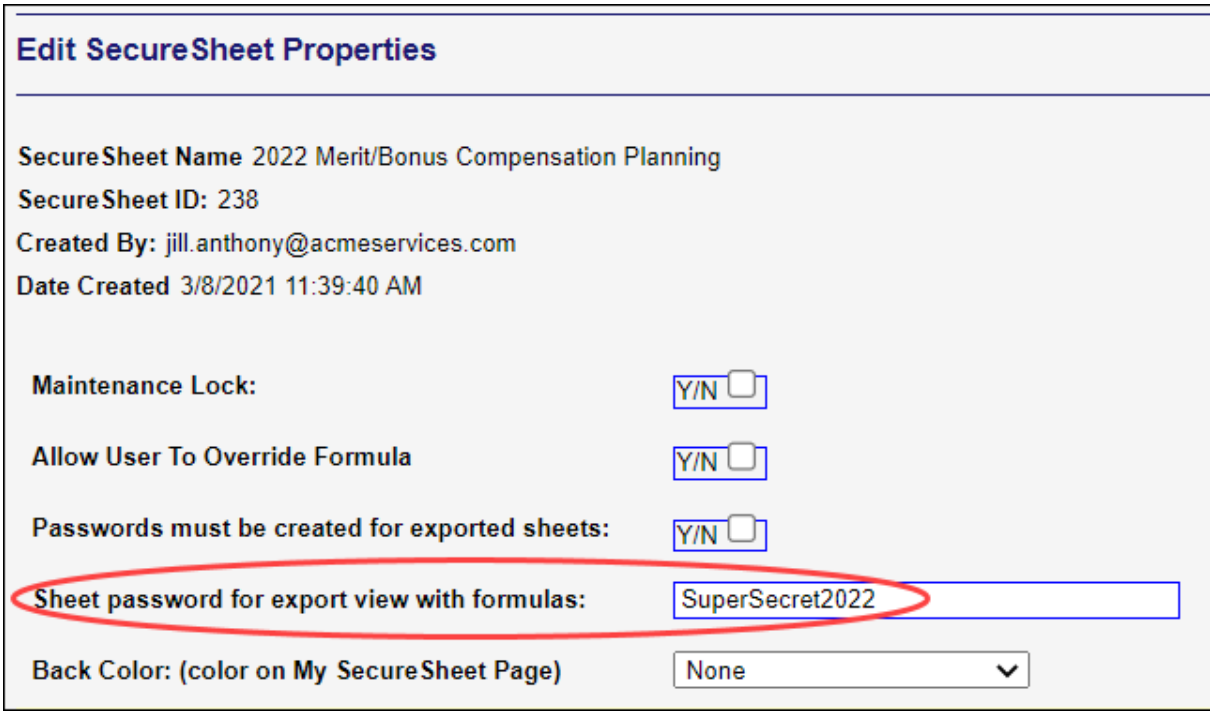
If you are evaluating how you want an exported SecureSheet to work offline for end users, see setting up a view to export wtih formulas for additional information.

Set Sheet Password when a View is Exported with Formulas

1. Select **Properties** from the Admin Tasks drop-down.



2. Enter a password in **Sheet password for export view with formulas:** that will prohibit users from manipulating columns in an exported excel file. Remember that SecureSheet cannot guarantee an end user from hacking into an excel file.



3. Click **Apply**.
4. Click**<< Go Back**.

Copy and Paste Values Into a Column or Range of Columns

When you need to update **values only** in a column or a range of columns, you may copy values from

Excel and paste them into SecureSheet.

Copy and Paste Values into a Column or Range of Columns

1. Login to SecureSheet and open the View that you will use to paste values.

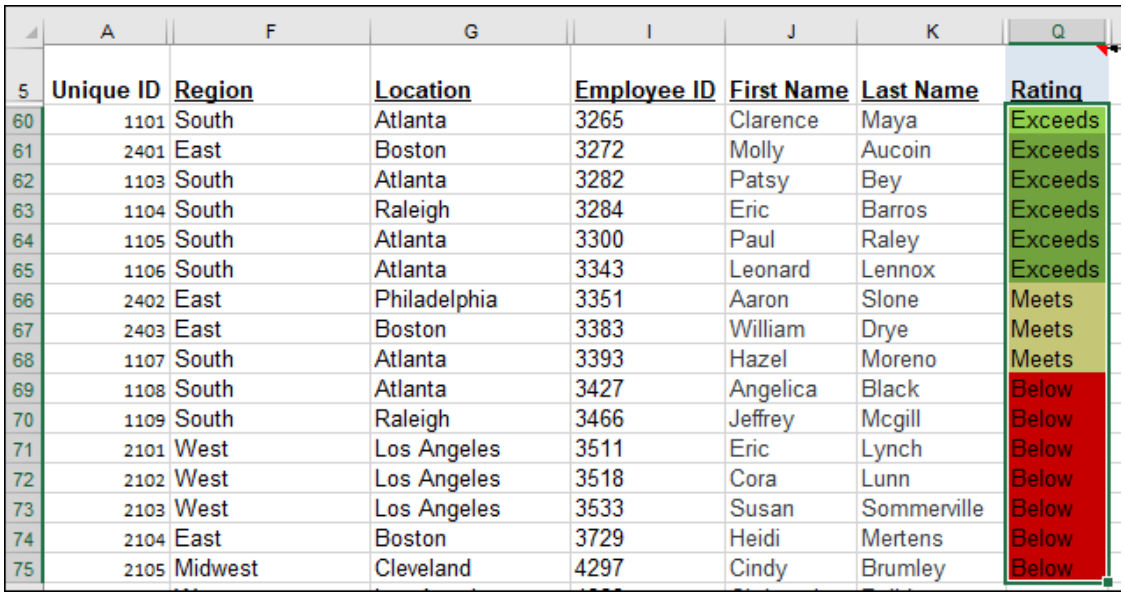
   NOTE: This may be a view that was set up especially to maintain just the column or range of columns you need to update, or it may be one of your other admin views where you can update values (e.g., All Data (Edit) or Add New Rows).

2. Open the Excel file with the values that you want to copy and paste into SecureSheet.

   NOTE: Most important when using copy/paste is that the order of the rows and columns (if pasting into more than one column) in Excel exactly matches the order of the rows and columns in SecureSheet. The way to ensure this is to export a view in SecureSheet to Excel and make your updates in that exported file.

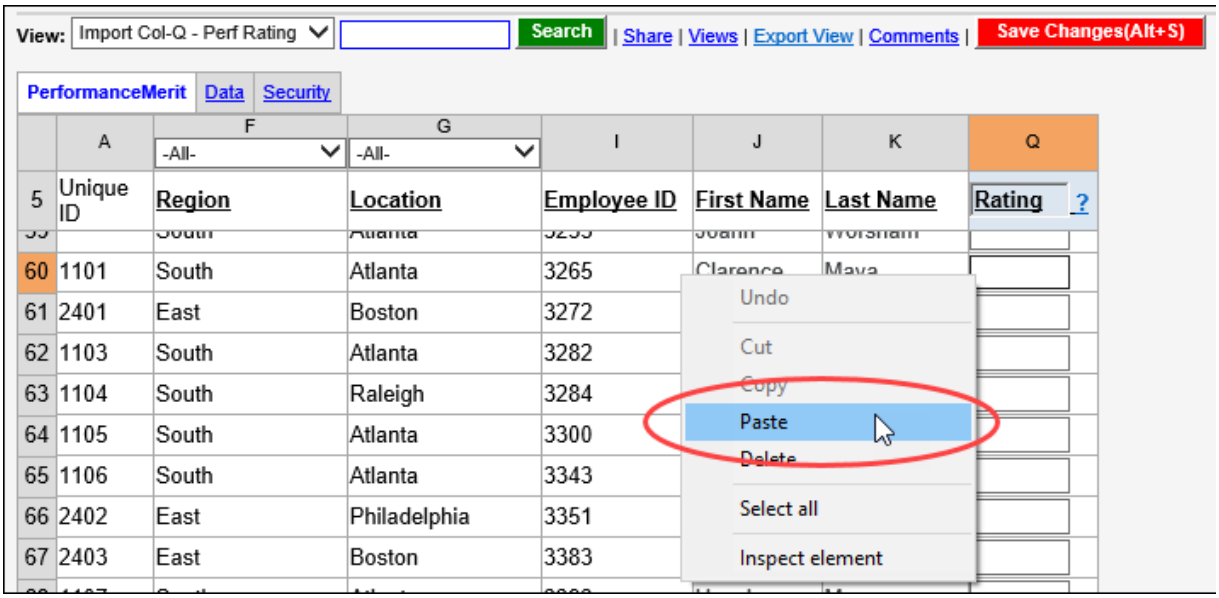
   NOTE: If you are using the Import Values (by view) tool instead of copy/paste, and you sorted (i.e., had the ability to sort) your exported Excel before importing, SecureSheet will match on the Unique ID in Column A, so the row order is not important when you use this approach to update column values.

3. Select the values you want to copy from Excel. You may either right-mouse click can select Copy or click ctrl+C to copy the values. Copy only values from the column(s) that is UnLocked in SecureSheet that you will be pasting into.
   - In this example, Column Q is the source column; the other columns are included for reference and filtering if needed.



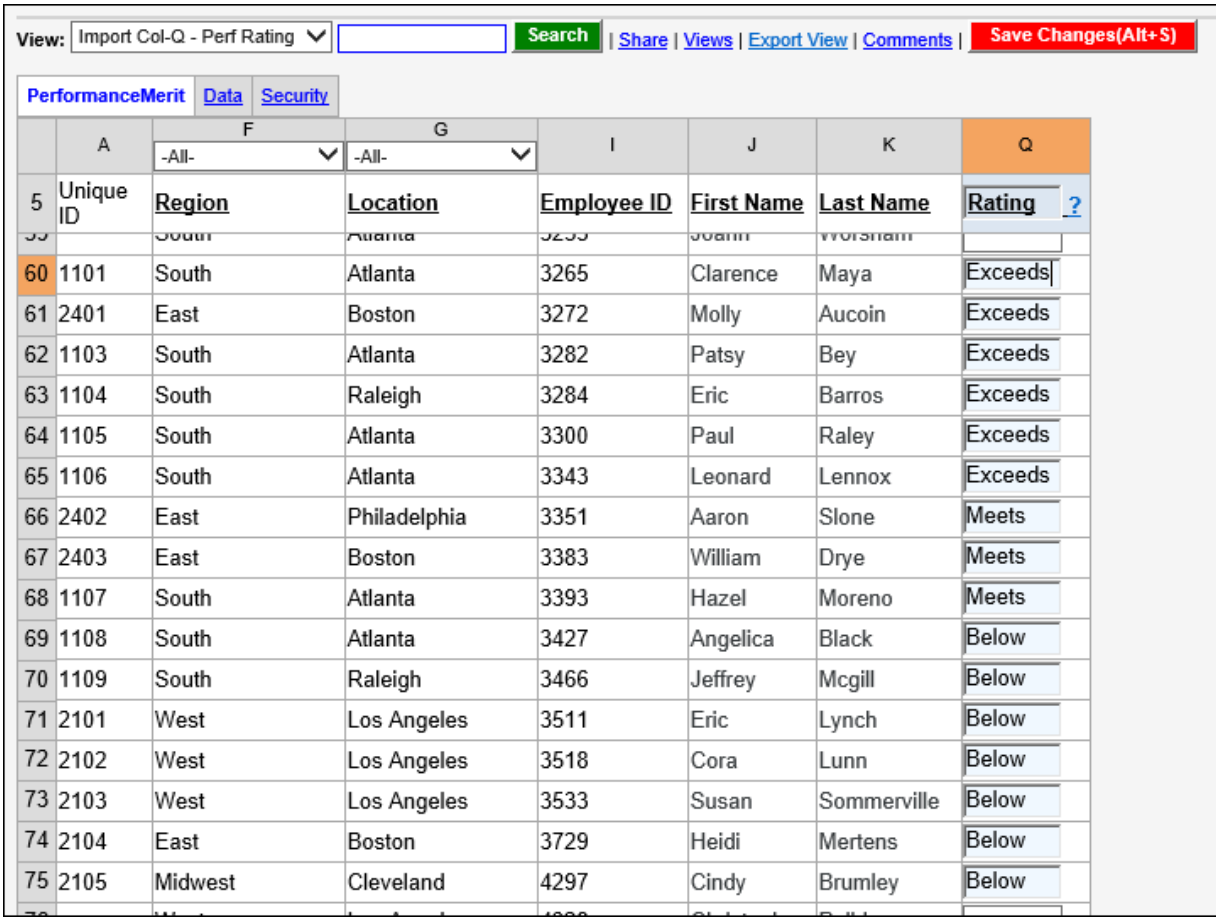
	A	F	G	I	J	K	Q
5	Unique ID	Region	Location	Employee ID	First Name	Last Name	Rating
60	1101	South	Atlanta	3265	Clarence	Maya	Exceeds
61	2401	East	Boston	3272	Molly	Aucoin	Exceeds
62	1103	South	Atlanta	3282	Patsy	Bey	Exceeds
63	1104	South	Raleigh	3284	Eric	Barros	Exceeds
64	1105	South	Atlanta	3300	Paul	Raley	Exceeds
65	1106	South	Atlanta	3343	Leonard	Lennox	Exceeds
66	2402	East	Philadelphia	3351	Aaron	Slone	Meets
67	2403	East	Boston	3383	William	Drye	Meets
68	1107	South	Atlanta	3393	Hazel	Moreno	Meets
69	1108	South	Atlanta	3427	Angelica	Black	Below
70	1109	South	Raleigh	3466	Jeffrey	Mcgill	Below
71	2101	West	Los Angeles	3511	Eric	Lynch	Below
72	2102	West	Los Angeles	3518	Cora	Lunn	Below
73	2103	West	Los Angeles	3533	Susan	Sommerville	Below
74	2104	East	Boston	3729	Heidi	Mertens	Below
75	2105	Midwest	Cleveland	4297	Cindy	Brumley	Below

4. Go to the View you will paste into in SecureSheet.
5. At the edge of the starting cell for the column or range of columns you are pasting into, right-mouse click and select Paste.



	A	F	G	I	J	K	Q
		-All-	-All-				
5	Unique ID	Region	Location	Employee ID	First Name	Last Name	Rating ?
60	1101	South	Atlanta	3265			
61	2401	East	Boston	3272			
62	1103	South	Atlanta	3282			
63	1104	South	Raleigh	3284			
64	1105	South	Atlanta	3300			
65	1106	South	Atlanta	3343			
66	2402	East	Philadelphia	3351			
67	2403	East	Boston	3383			

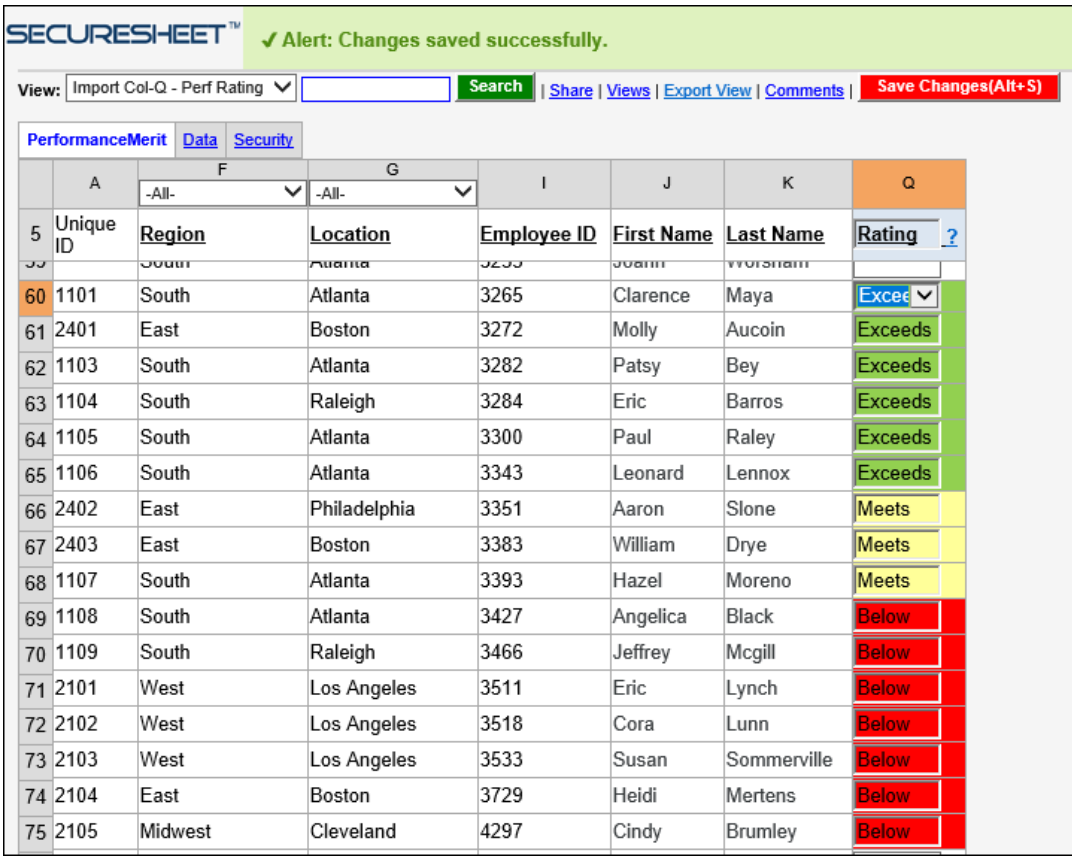
6. Click **Save Changes** to save the values you pasted into SecureSheet.



	A	F	G	I	J	K	Q
		-All-	-All-				
5	Unique ID	Region	Location	Employee ID	First Name	Last Name	Rating ?
60	1101	South	Atlanta	3265	Clarence	Maya	Exceeds
61	2401	East	Boston	3272	Molly	Aucoin	Exceeds
62	1103	South	Atlanta	3282	Patsy	Bey	Exceeds
63	1104	South	Raleigh	3284	Eric	Barros	Exceeds
64	1105	South	Atlanta	3300	Paul	Raley	Exceeds
65	1106	South	Atlanta	3343	Leonard	Lennox	Exceeds
66	2402	East	Philadelphia	3351	Aaron	Slone	Meets
67	2403	East	Boston	3383	William	Drye	Meets
68	1107	South	Atlanta	3393	Hazel	Moreno	Meets
69	1108	South	Atlanta	3427	Angelica	Black	Below
70	1109	South	Raleigh	3466	Jeffrey	Mcgill	Below
71	2101	West	Los Angeles	3511	Eric	Lynch	Below
72	2102	West	Los Angeles	3518	Cora	Lunn	Below
73	2103	West	Los Angeles	3533	Susan	Sommerville	Below
74	2104	East	Boston	3729	Heidi	Mertens	Below
75	2105	Midwest	Cleveland	4297	Cindy	Brumley	Below

7. Continue copying and pasting values as needed.

   NOTE: If any of the columns you paste into have conditional formatting, data validations, or drop-down lists, they will take affect after you save changes.



	A	F	G	I	J	K	Q
		-All-	-All-				
5	Unique ID	Region	Location	Employee ID	First Name	Last Name	Rating ?
60	1101	South	Atlanta	3265	Clarence	Maya	Excee
61	2401	East	Boston	3272	Molly	Aucoin	Exceeds
62	1103	South	Atlanta	3282	Patsy	Bey	Exceeds
63	1104	South	Raleigh	3284	Eric	Barros	Exceeds
64	1105	South	Atlanta	3300	Paul	Raley	Exceeds
65	1106	South	Atlanta	3343	Leonard	Lennox	Exceeds
66	2402	East	Philadelphia	3351	Aaron	Slone	Meets
67	2403	East	Boston	3383	William	Drye	Meets
68	1107	South	Atlanta	3393	Hazel	Moreno	Meets
69	1108	South	Atlanta	3427	Angelica	Black	Below
70	1109	South	Raleigh	3466	Jeffrey	Mcgill	Below
71	2101	West	Los Angeles	3511	Eric	Lynch	Below
72	2102	West	Los Angeles	3518	Cora	Lunn	Below
73	2103	West	Los Angeles	3533	Susan	Sommerville	Below
74	2104	East	Boston	3729	Heidi	Mertens	Below
75	2105	Midwest	Cleveland	4297	Cindy	Brumley	Below

Audit SecureSheet Activity

SecureSheet tracks all user activity for your organization including all user logins, cell level changes, and import and export activity. You know everything that occurs in SecureSheet because it is logged in the SecureSheet audit functionality.

- Administrators can audit site-wide information on all of the SecureSheets in your organization, as well as SecureSheet-specific activity.

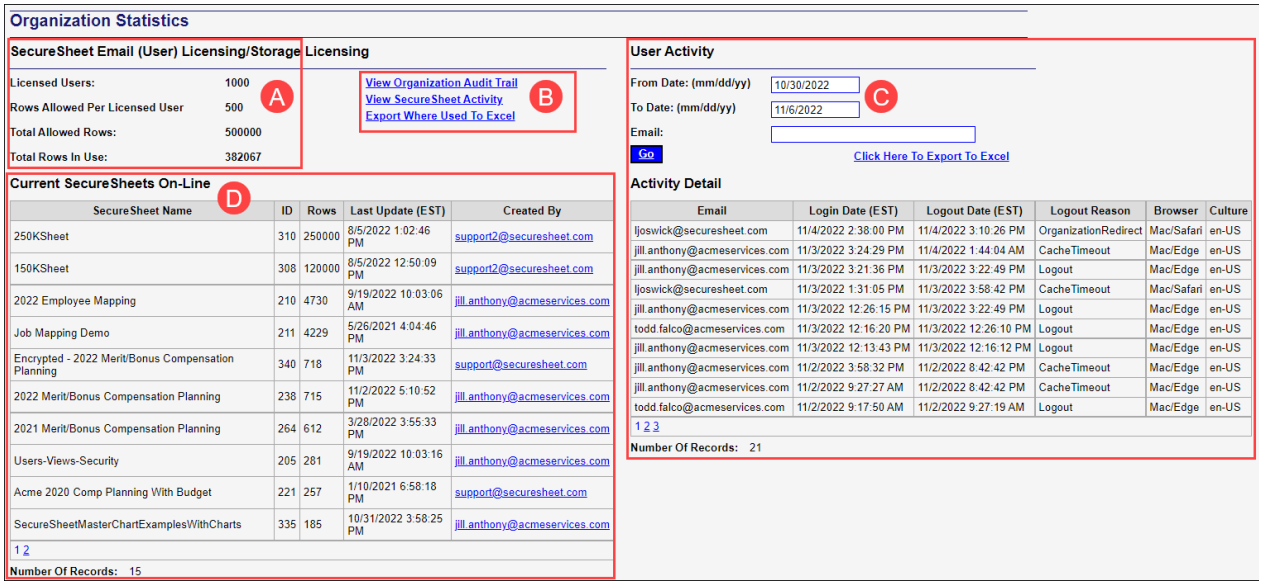
Video Resources:

- SecureSheet Site Audit
- SecureSheet-Specific Audit

SecureSheet Site Audit

Access **System Administration** through the navigation links on the top right of your SecureSheet screen:

Click **Organization Statistics** to access the following:



A. **SecureSheet (Email) User Licensing and Storage Information**- Shows the current number of licensed users, allocated rows, and rows in use for your organization.

B. Links to:

- **View Organization Audit Trail** - Click to see a list of all the import and export activity for your organization. The Audit Trail maintains 90 days of audit history.
- **View SecureSheet Activity** - Click to see a list of your SecureSheets and the most recent date each user has accessed them.
- **Export Where Used To Excel** - Click to export a detailed list of all email adresses shared to all of the SecureSheets in your organization, including tabs in each SecureSheet, permission, and last login date and time.

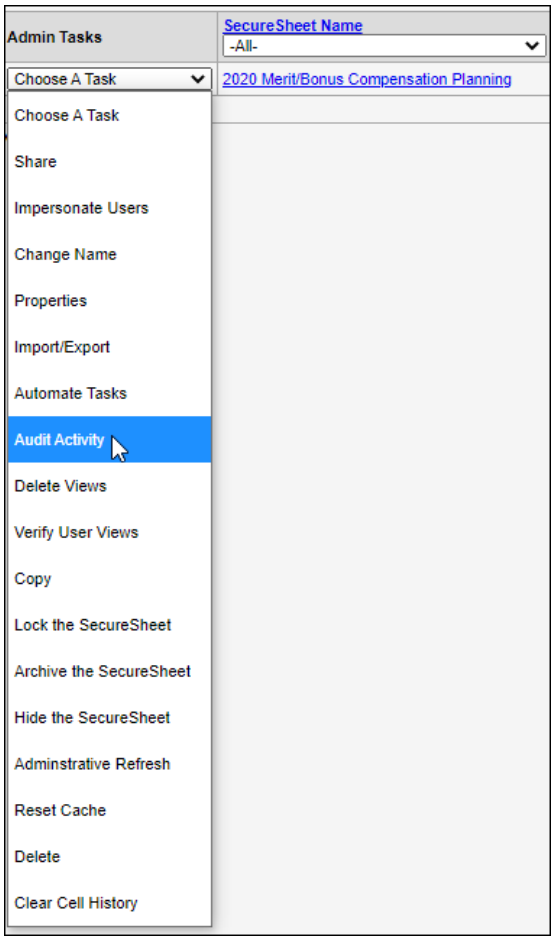
C. **User Activity** - Displays a list of Login Activity for your organization. Enter From and To dates to filter activity as desired. Use the **Click Here To Export To Excel** link to work with User Activity offline.

> **NOTE:** When you are testing SSO, you can use this export to see how a user has logged in.

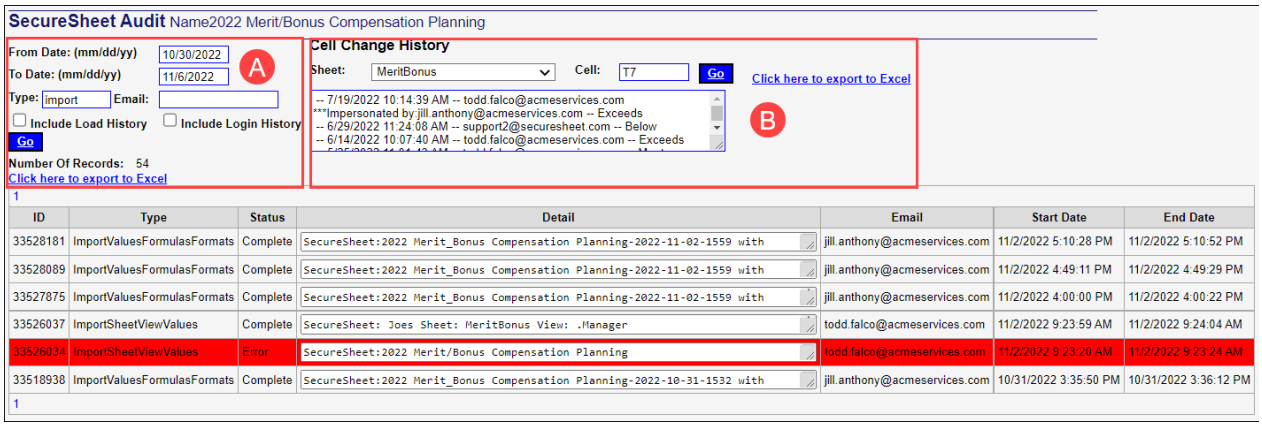
D. **Current SecureSheets On-Line** - Lists all SecureSheets in your organization's site, the total row count for each SecureSheet, the last time the SecureSheet was updated and who created the SecureSheet.

SecureSheet-Specific Audit

A SecureSheet-specific audit can be accessed by selecting **Audit Activity** from the **Admin Tasks** drop-down next to the SecureSheet you want to audit on your SecureSheet Home Page:



You can then enter specific audit parameters and export activity results to Excel as desired:



NOTE: The Audit Trail maintains 90 days of audit history. Cell Change History audit is effective for the lifecycle of a SecureSheet, as long as new rows of data are added online and the row count does not change on an import using the import values/formulas/formats tool.

Activity Audit

- All SecureSheet activities are tracked through SecureSheet audit. You may filter details by activity type - which are actions taken with the data based on user permission, such as importing and exporting data, importing values, exporting statements, adding columns, deleting columns, etc.
    - If you need to audit a specific activity, you may enter the type of activity in the **Type** field.
    - If you need to audit activity by a specific email address, you may enter the email address in the **Email** field.

- If you need to auditi a specific activity by a specific email address, you may enter the type of activity and the email address in the **Type** and **Email** fields, respectively.

- You may export the SecureSheet activity audit by clicking the **Click here to export to Excel** link.

Cell Change History

- All cell changes SecureSheet activities are tracked through the lifecycle of a SecureSheet, as long as new rows of data are added online and the row count does not change on an import using the import values/formulas/formats tool. You may audit any cell in a SecureSheet.
  - Select the sheet that contains the cell you want to audit from the **Sheet** dropdown.
  - Enter the specific cell you want to audit in the **Cell** field.
  - Click **Go**.
- You may export the Cell Change History audit by clicking the **Click here to export to Excel** link.

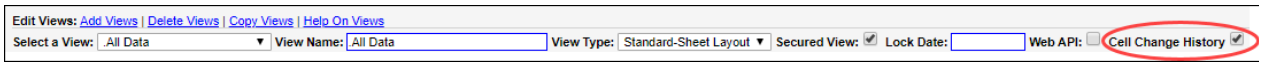
Audit Cell Change History in SecureSheet

SecureSheet tracks every change made by a SecureSheet user in every cell. Cell History is maintained with a SecureSheet forever, unless it is overwritten. Cell History is wiped clean when:

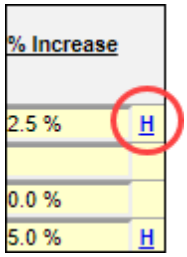
- An administrator purposely clears cell history.
- The row count or row order is changed on an import from Excel (or rows are reset for a SecureSheet online).
  - To maintain cell history in an existing SecureSheet, you can re-import values and/or formulas, but you cannot change the row count nor the row order.
    - For example, if the SecureSheet tab has 100 rows and your Excel file has 130 rows, and you import values and formulas, your cell history will be removed.
  - If you would like cell history to be tied to the unique ID in Column A, contact the SecureSheet support team for assistance.
- Anytime a copy of a SecureSheet is made.

Audit Cell Change History

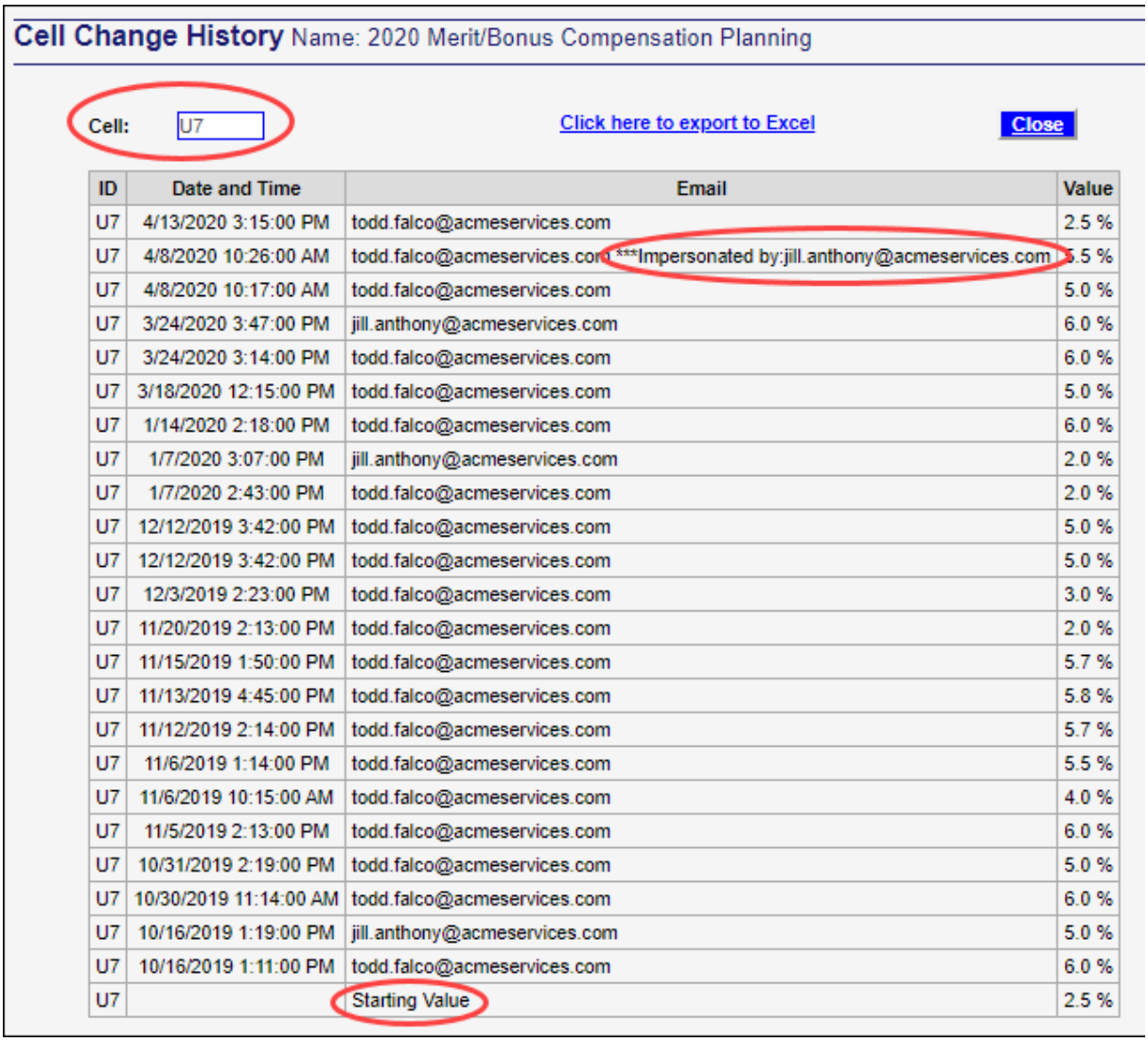
- The cell change history can be seen when the **Cell Change History** property is turned on in a View.



- When **Cell Change History** is on, an **H** will appear in every cell with a value that has been changed from its starting value.



- When you click on the **H** in a cell, another browser window will open with the cell change history.



Cell Change History Name: 2020 Merit/Bonus Compensation Planning

Cell: U7 Click here to export to Excel Close

ID	Date and Time	Email	Value
U7	4/13/2020 3:15:00 PM	todd.falco@acmeservices.com	2.5 %
U7	4/8/2020 10:26:00 AM	todd.falco@acmeservices.com ***Impersonated by:jill.anthony@acmeservices.com	5.5 %
U7	4/8/2020 10:17:00 AM	todd.falco@acmeservices.com	5.0 %
U7	3/24/2020 3:47:00 PM	jill.anthony@acmeservices.com	6.0 %
U7	3/24/2020 3:14:00 PM	todd.falco@acmeservices.com	6.0 %
U7	3/18/2020 12:15:00 PM	todd.falco@acmeservices.com	5.0 %
U7	1/14/2020 2:18:00 PM	todd.falco@acmeservices.com	6.0 %
U7	1/7/2020 3:07:00 PM	jill.anthony@acmeservices.com	2.0 %
U7	1/7/2020 2:43:00 PM	todd.falco@acmeservices.com	2.0 %
U7	12/12/2019 3:42:00 PM	todd.falco@acmeservices.com	5.0 %
U7	12/12/2019 3:42:00 PM	todd.falco@acmeservices.com	5.0 %
U7	12/3/2019 2:23:00 PM	todd.falco@acmeservices.com	3.0 %
U7	11/20/2019 2:13:00 PM	todd.falco@acmeservices.com	2.0 %
U7	11/15/2019 1:50:00 PM	todd.falco@acmeservices.com	5.7 %
U7	11/13/2019 4:45:00 PM	todd.falco@acmeservices.com	5.8 %
U7	11/12/2019 2:14:00 PM	todd.falco@acmeservices.com	5.7 %
U7	11/6/2019 1:14:00 PM	todd.falco@acmeservices.com	5.5 %
U7	11/6/2019 10:15:00 AM	todd.falco@acmeservices.com	4.0 %
U7	11/5/2019 2:13:00 PM	todd.falco@acmeservices.com	6.0 %
U7	10/31/2019 2:19:00 PM	todd.falco@acmeservices.com	5.0 %
U7	10/30/2019 11:14:00 AM	todd.falco@acmeservices.com	6.0 %
U7	10/16/2019 1:19:00 PM	jill.anthony@acmeservices.com	5.0 %
U7	10/16/2019 1:11:00 PM	todd.falco@acmeservices.com	6.0 %
U7		Starting Value	2.5 %

- You may also take an export of cell history using the SecureSheet import/export tool and click the **Include Cell History** checkbox on the export.
- You may also audit a specific cell change through the SecureSheet-specific audit tool.

Audit Last Updated by and Last Update

SecureSheet tracks the last update date and last update user for each row in a SecureSheet. You can set up an All Data (View Only) - Recent and History view that shows you the Last Updated by and Last Update rows sorted at the top of the view, and also shows cell change history in each of the value-based cells.

SecureSheet also has an audit trail for all cell changes.

Audit Row History

1. Copy the All Data (View Only) view. All of the columns are locked in this view.
2. Name the view All Data (View Only) - Recent and History, for example.
3. Set the **Last Updated by** and **Last Update** columns to Locked (which makes them visible in the view). These are at the end of the data columns.
4. Turn on the Auto Sort and Auto Filter on both columns.
5. On the **Last Update** column, set an Advanced Sort to **Seq: 1** (or whatever sort sequence is next for

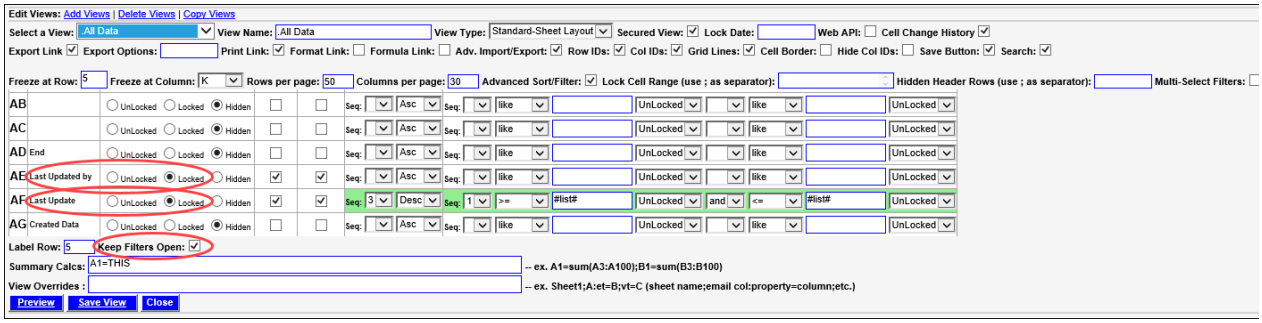
the view), **Desc** to default the view with the most recent updates at the top.

6. If you would like to be able to select a date range to use in this view, on the **Last Update** column, set an advanced filter to **Seq: 1** (or whatever sort sequence is next for the view) with **>= #list# UnLocked and <= #list# UnLocked**. This is optional. If you do not add the date range, the view will sort on the Last Update column and show all rows.

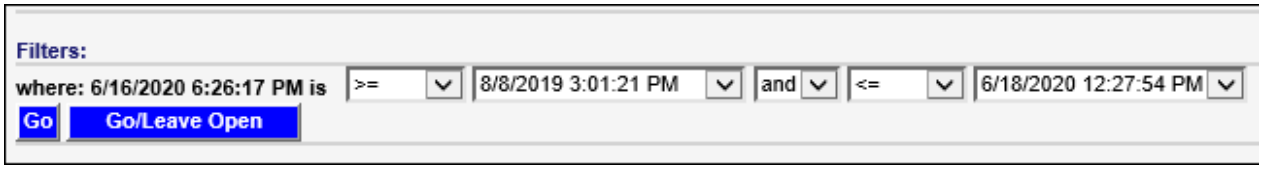
   NOTE: If you add this #list# advanced filter to the view, you may want to first copy the All Data (View Only) view to another view and rename it Audit History - Date Range, for example, and add the advanced filter to this new view.

7. Turn on the **Keep Filters Open** setting.
8. Click **Save View**.

View set up example:



The date range selection will look like the following on your view:



- Click **Go** - filters will close and you will see the result set. You can export the view from here, or click Change Filters to return to the filter selection.
- Click **Go/Leave Open** - filters will remain open when you see the result set.

Clear Cell History

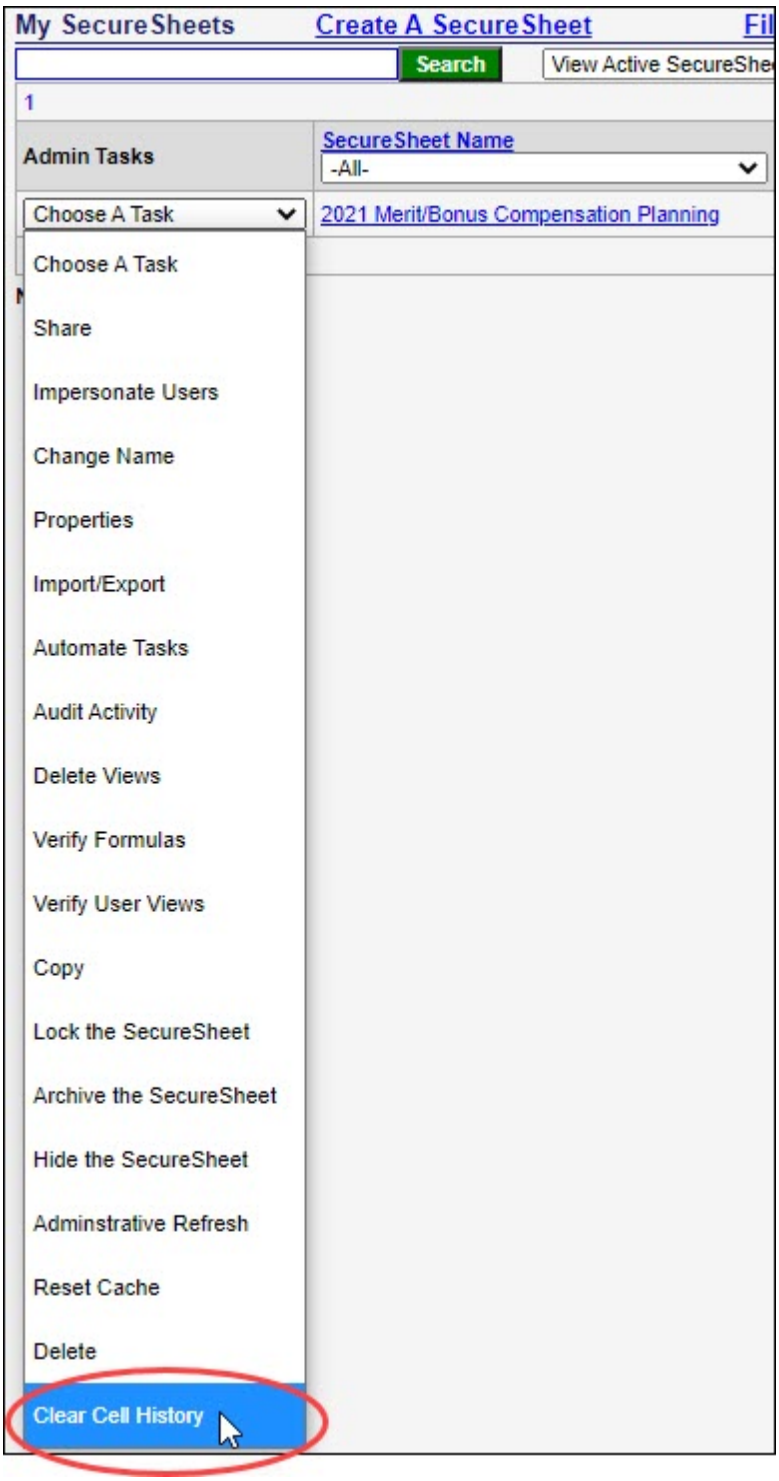
After a SecureSheet is created, all cell changes are tracked. Access to cell changes can be turned on in administrator and end user views by turning on the cell change history property in the view. Cell changes are always being tracked whether or not access to the cell changes is on or off in a view.

During setup and testing, cell changes will be made, and they will be tracked. Before go-live, clear cell history so that the starting point of the cell changes is at go-live, and does not include cell changes made during testing.

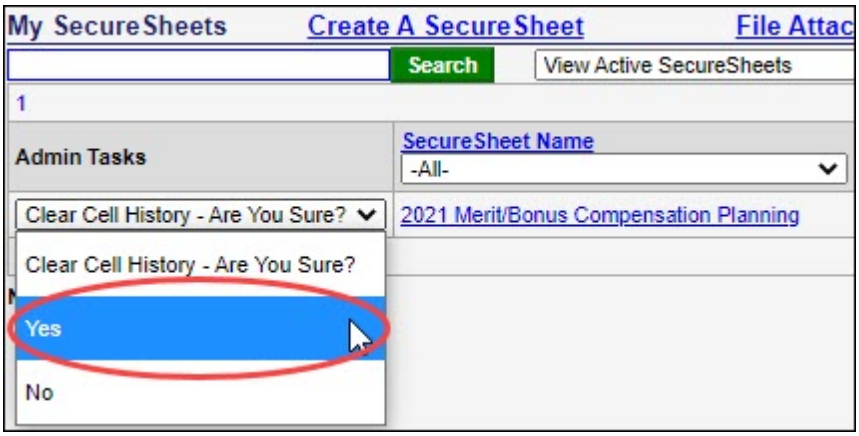
NOTE:

- Cell history is automatically overwritten if a different number of rows or the order of the rows changes on an import to SecureSheet.
- SecureSheet also tracks changes at the row level. These system-level audit columns are not overwritten when cell history is cleared.

1. Select **Clear Cell History** from the **Admin Tasks** drop-down next to the SecureSheet that you want to clear.



2. Click **Yes** to confirm that you are sure you want to clear cell history.



Work with Data Validations

Data validations work in SecureSheet as they do in Excel:

- Any data validations that exist in your compensation Excel file are imported into SecureSheet when it is initially created.
- Any data validations that you add to your compensation Excel file through the **Import/Export** process are imported into SecureSheet when you select the **Data Validations** property in the **Import Values/Formulas/Formats** tool.

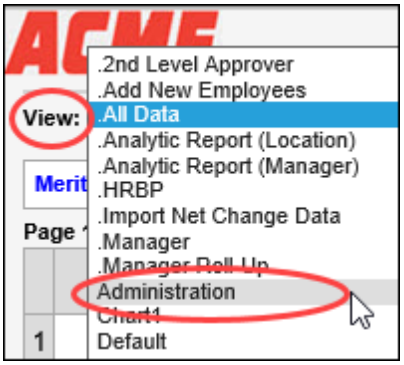
When a SecureSheet is live, there may be a scenario where an administrator wants to add or modify a data validation online. This is possible using the administrator tools in SecureSheet. There are two ways to add or modify data validations online:

- Data Validation – Using a List
- Data Validation – Using a Named Range

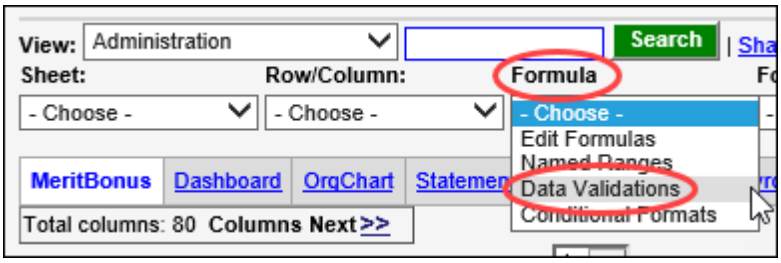
If you need to remove a data validation, you may remove it online.

Data Validation – Using a List

1. Select the SecureSheet from your home page.
2. Go to the applicable sheet within your SecureSheet where you need to add or modify a data validation using a list of values.
3. Select **Administration** from the **View** drop-down.

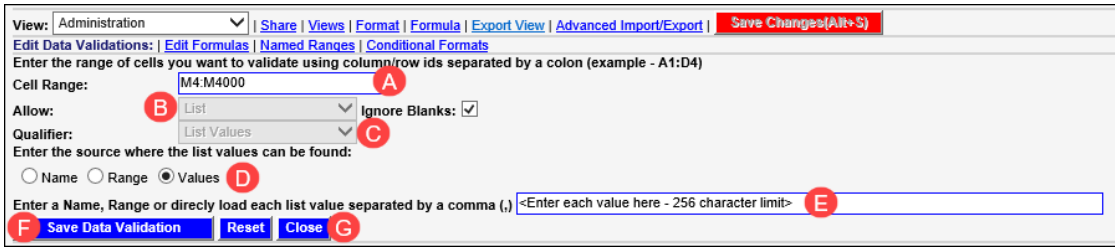


4. Select **Data Validations** from the **Formula** drop-down list.



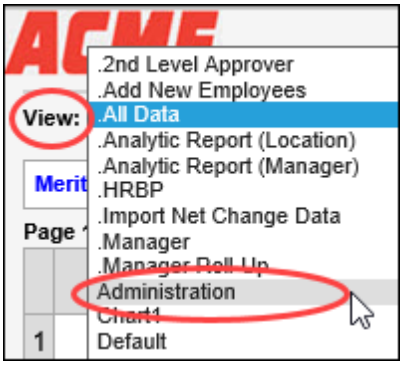
5. Enter the Data Validation properties:
    A. Enter the **Cell Range** that you want to validate (go beyond your final row in case you add rows later).
    B. Select **List** from the **Allow** drop-down list. The Qualifier field will appear.
    C. Select **List Values** from the **Qualifier** drop-down list.
    D. Click the **Values** button to indicate the source where the list values can be found.
    E. Enter the list values in the list field separated by a comma.

        NOTE: There is a 256-character limit in Excel and SecureSheet for entered lists, and no limit when referencing a Named Range. If you need to go beyond 256-characters, follow the instructions for **Adding a Data Validation – Using a Named Range**.
    F. Click **Save Data Validation**.
    G. Click **Close**.

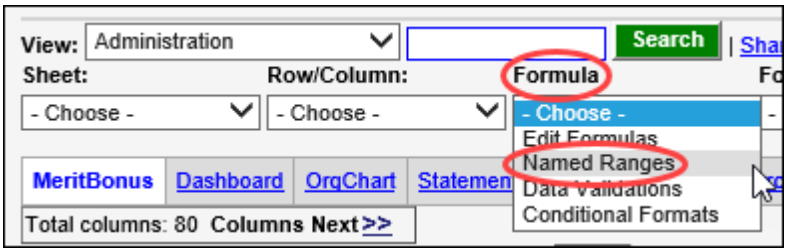


Adding a Data Validation – Using a Named Range

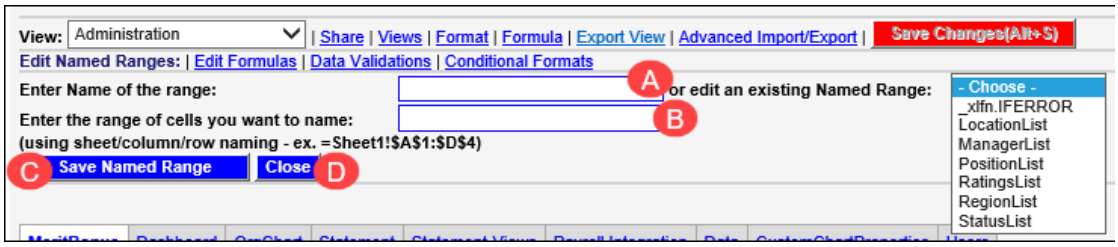
1. Select the SecureSheet from your home page.
2. Go to the applicable sheet within your SecureSheet where you need to add or modify a data validation using a Named Range.
3. Select **Administration** from the **View** drop-down.



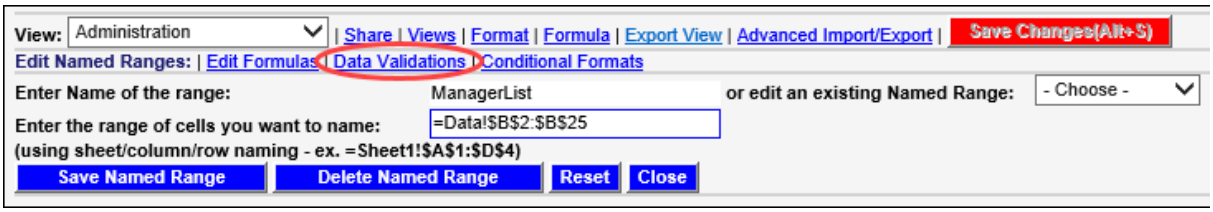
4. Select **Named Ranges** from the **Formula** drop-down list.



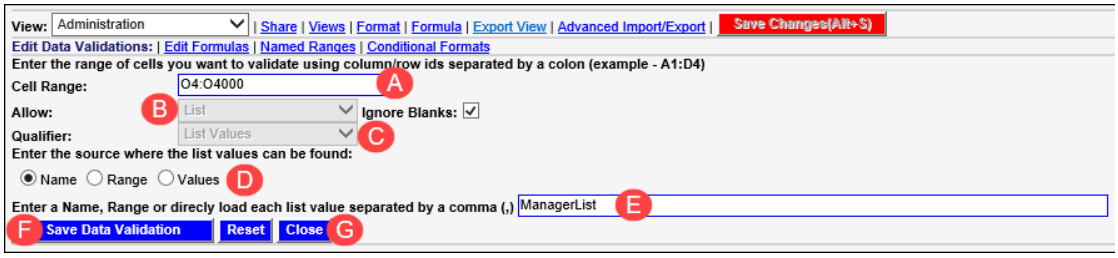
5. Enter the Named Range properties:
   A. **Enter Name of the range** to create a new Named Range OR select **an existing Named Range** from the drop-down list to edit the properties of a Named Range already in your sheet.
   B. **Enter the range of cells you want to name** OR modify the range of cells if you are updating an existing Named Range. Be sure to follow the exact syntax as noted on the screen.
   C. Click **Save Named Range**.
   D. If you need to apply a new Named Range to a Data Validation, continue with the steps OR if you are finished updating an existing Named Range, Click **Close**.



6. Click **Data Validations** to apply a new Named Range to a data validation.



7. Enter the Data Validation properties:
   A. Enter the **Cell Range** that you want to validate (go beyond your final row in case you add rows later). This must use absolute cell references (not relative B:B).
   B. Select **List** from the **Allow** drop-down list. The Qualifier field will appear.
   C. Select **List Values** from the **Qualifier** drop-down list.
   D. Click the **Name** button to enter the Named Range that contains the list values.
   E. Enter the **Name** of the Named Range.
   F. Click **Save Data Validation**.
   G. Click **Close**.

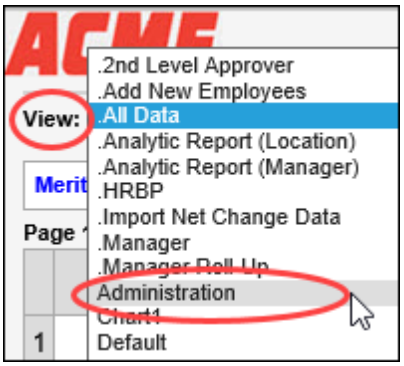


Notes about Data Validations

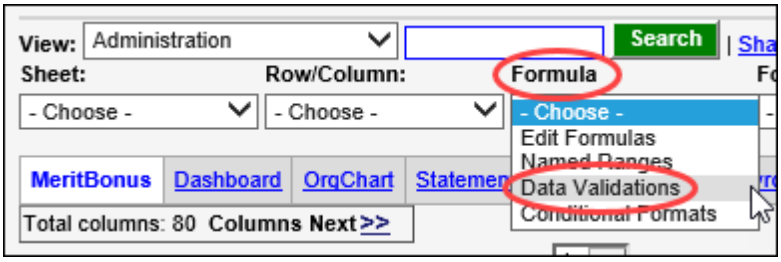
- There is no need to lock the SecureSheet if you are just importing Data Validations through the Import Values/Formulas/Formats tool.

Removing a Data Validation

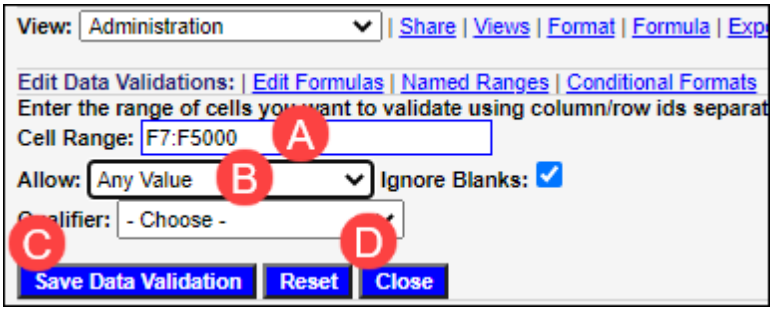
1. Select the SecureSheet from your home page.
2. Go to the applicable sheet within your SecureSheet where you need to remove a data validation.
3. Select **Administration** from the **View** drop-down.



4. Select **Data Validations** from the **Formula** drop-down list.



5. Enter the Data Validation properties:
    A. Enter the **Cell Range** that you want to remove the data validation from (go beyond your final row in case you add rows later).
    B. Select **Any Value** from the **Allow** drop-down list.
    C. Click **Save Data Validation**.
    D. Click **Close**.



Work with Conditional Formatting

SecureSheet supports as many conditional formats as you want to add into your structure. They work as they do in Excel with the following exceptions:

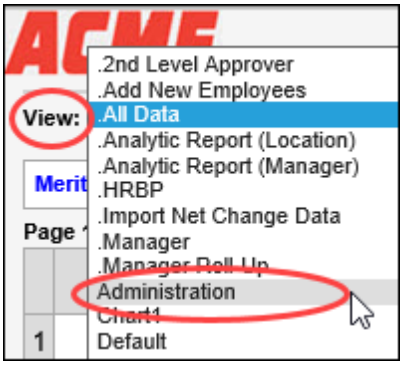
- SecureSheet does not support "contains" or "like" conditions.

Conditional formats import to your SecureSheet when it is initially created. Conditional formats may be updated offline using the Import/Export tools.

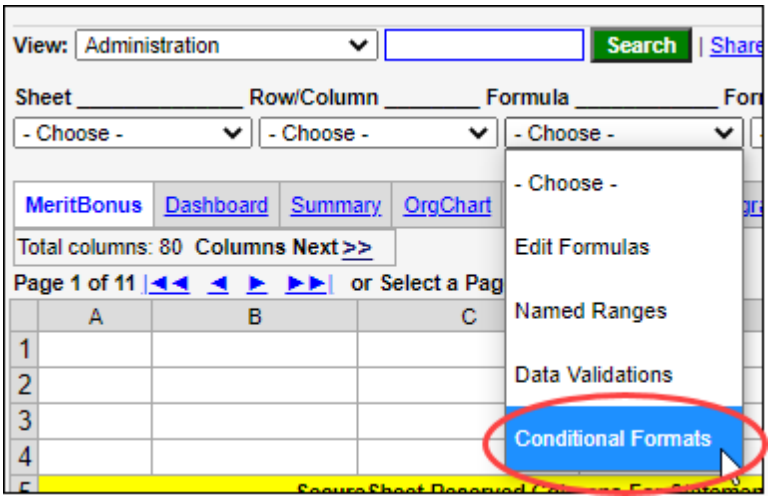
If desired, conditional formats may be adjusted online, and when your SecureSheet is active. You may update conditional formatting online in an active SecureSheet without putting it on maintenance lock.

Adjusting Conditional Formatting Online

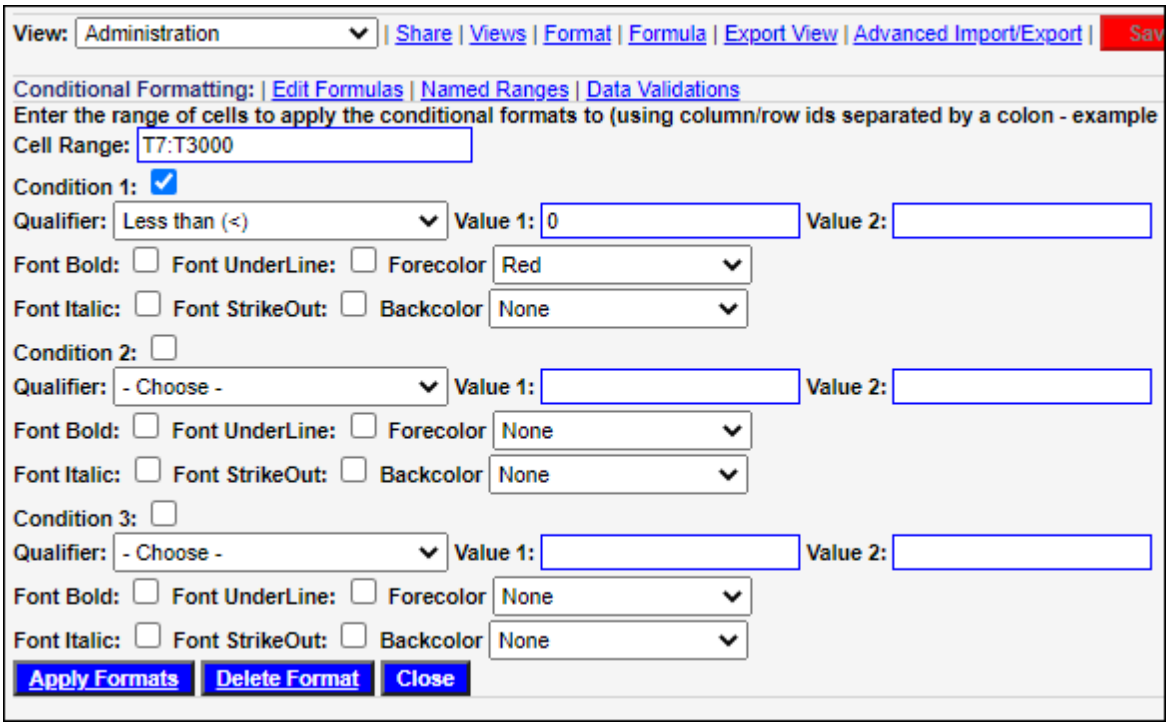
1. Select the SecureSheet from your home page.
2. Go to the applicable tab within your SecureSheet where you need to add or modify a conditional format.
3. Select **Administration** from the **View** drop-down.



4. Select **Conditional Formats** from the **Formula** drop-down list.



5. Enter the Conditional Format properties by entering a cell range and identifying the condition qualifiers as needed:



6. Click **Apply Formats**.
7. Click **Close**.

> **NOTE:** If you want to delete a conditional format from a range of cells, enter the Cell Range, leave the conditions blank, and click **Delete Format**.

Update Formulas in Header Rows

SecureSheets often have formulas in header rows that are summarizing data for users based on the rows returning in each end user view. If you just need to update a header row formula or formulas, you may update the header formula online through the Administration tools in SecureSheet (without exporting and importing the entire SecureSheet). You may do this online formula update before or after go-live without disrupting your end users.

> **NOTE:** If you need to update a formula that applies to an entire column in your data structure, you will need to export and import the entire SecureSheet. Follow the import/export instructions to apply a formula change to an entire column(s). If the SecureSheet is live, follow the Maintain a Live SecureSheet instructions to lock the SecureSheet for maintenance before importing a formula change.

Updating a Formula Online

1. Select **Administration** from the View drop-down.
2. Click **Formula**.

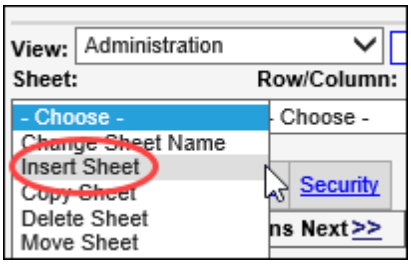
3. The formula cells/columns will be visible in the SecureSheet online.
4. Make the formula update directly in the cell.
5. Click **Save Changes**.
6. Click **Close** to leave Formula update mode.
7. Verify the formula update in the All Data view or by impersonating an end user.

Insert a Tab

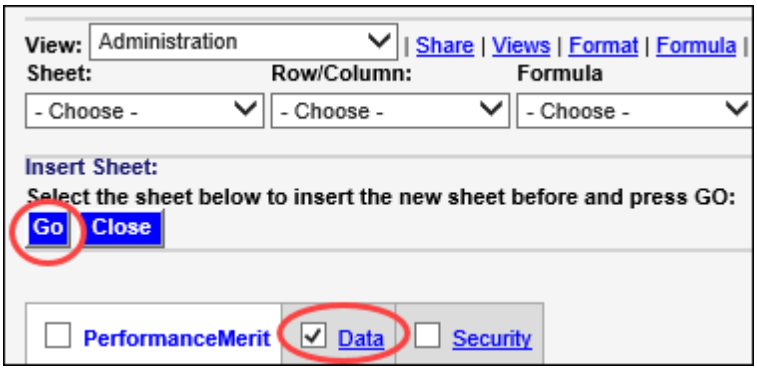
If you need to add a tab to your existing SecureSheet structure, you need to add the tab in SecureSheet first and then you can import you new tab from Excel.

Inserting a Tab/Sheet in SecureSheet

1. Login to SecureSheet.
2. Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Select **Administration** from the **View:** drop-down.
4. Select **Insert Sheet** from the **Sheet:** drop-down.



5. Select the sheet that you want to insert the new sheet before (e.g., sheet will be inserted before Data tab in example below).
6. Click **Go**. A new sheet will be inserted with a generic name, e.g., Sheet4.



7. Change the name of the tab in SecureSheet to exactly match the name of the tab you will import from Excel before you import. If the tab name does not exactly match, the import will fail.
8. Insert Columns so the new SecureSheet tab has the same number of columns you will import from Excel before you import. If you might expand the number of columns on this tab over time, add additional columns to the right of your last data column so you have extra columns to accommodate your additions in the future. If you do not anticipate this tab will grow in columns, you may end the number of columns exactly at your last data column.
9. Once the name and number of columns match the sheet you want to import from Excel, import just the new tab to SecureSheet.

   NOTE: When you are importing, if no changes have been made to the other tabs in SecureSheet, import the new tab only. If you made changes to any other tabs, make sure you start with an export from SecureSheet.

Change the Name of a Tab

You may need or want to update the name of a tab in SecureSheet. The name of every tab that is

imported from Excel must match excatly the tab name in SecureSheet or the import will fail.

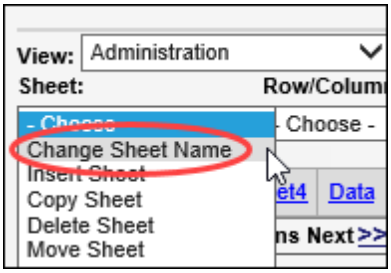
Example scenarios in which updating a tab name may occur include:

- Adding a new tab to SecureSheet. When you add a tab, it defaults a name. Change this to the tab name you will import from Excel.
- Updating data month to month on the same tab and as the months change, the tab name changes.
- Updating a SecureSheet from one year to the next; your main sheet may include the year, so if you copy the previous year's SecureSheet, you will have to update the name to match your updated Excel.

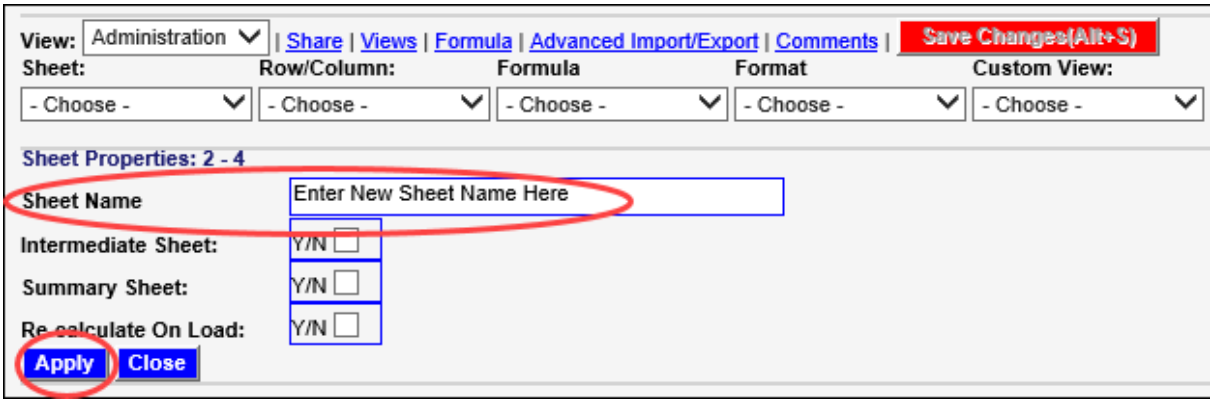
IMPORTANT: Tab names in SecureSheet must match tab names in Excel **exactly** for an import from Excel to work.

Changing the Name of a Tab/Sheet in SecureSheet

1. Login to SecureSheet.
2. Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Select the tab in SecureSheet with the name you want to change.
4. Select **Administration** from the **View:** drop-down.
5. Select **Change Sheet Name** from the **Sheet:** drop-down.



6. Update the name in the **Sheet Name** field.
7. Click **Apply**.



8. Once the tab name matches the tab name you want to import from Excel, you may import to SecureSheet.

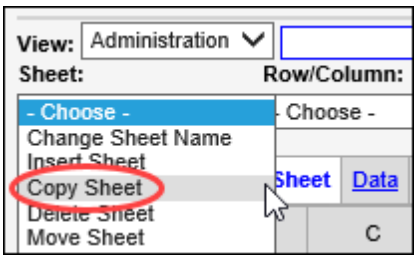
Copy a Tab

If you need to add a tab to your existing SecureSheet structure, and the design of an existing tab

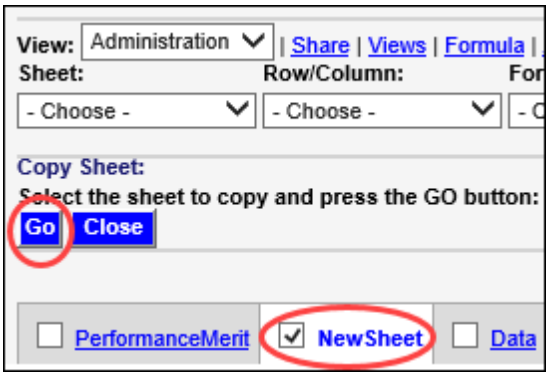
(already in your SecureSheet structure) is close to the new tab you want to add based on the number of columns and/or contents, you can copy the existing tab to a new tab, change its name, and then import from Excel.

Copying a Tab/Sheet in SecureSheet

1. Login to SecureSheet.
2. Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Select **Administration** from the **View:** drop-down.
4. Select **Copy Sheet** from the **Sheet:** drop-down.



5. Select the sheet that you want to copy (e.g., NewSheet will be copied in example below).
6. Click **Go**. A new sheet will be inserted with a generic name, e.g., NewSheet (5).



7. Change the name of the tab in SecureSheet to exactly match the name of the tab you will import from Excel before you import. If the tab name does not exactly match, the import will fail.
8. Check that the number of columns accommodates the number of columns you will import from Excel before you import. If needed, insert columns into the tab.
9. Once the name matches and columns are set to accommodate the structure in Excel, import just the new tab to SecureSheet.

   NOTE: When you are importing, if no changes have been made to the other tabs in SecureSheet, import the new tab only. If you made changes to any other tabs, make sure you start with an export from SecureSheet.

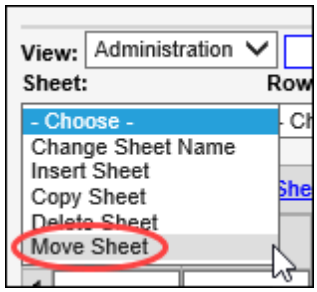
Move a Tab

If you want to adjust the order of tabs in a SecureSheet, you can move the tabs as needed.

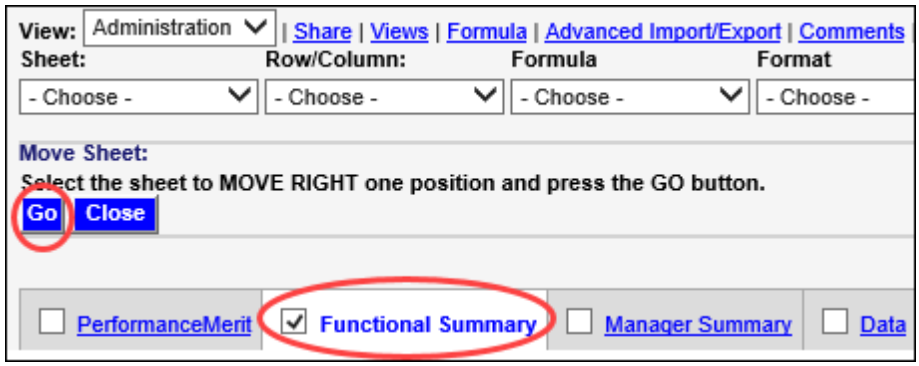
> **NOTE:** The order of the tabs beween Excel and SecureSheet do not have to match; SecureSheet matches on the tab name when you are importing. From an administrative perspective, it may be easier to keep the order consistent.

Moving a Tab/Sheet in SecureSheet

1. Login to SecureSheet.
2. Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Select **Administration** from the **View:** drop-down.
4. Select **Move Sheet** from the **Sheet:** drop-down.



5. Select the sheet that you want to move (e.g., the Functional Summary tab will move after Manager Summary tab in example below).
6. Click **Go**. The sheet will move one position to the right.



7. If you need to move the tab further to the right or if you need to move additional tabs, repeat steps 5-6 until the tab order is set as needed.
8. Click **Close**.

Delete a Tab

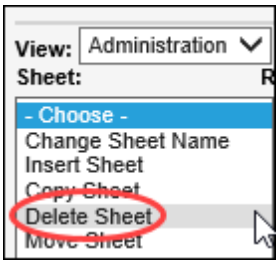
If you find that a tab is not being used in SecureSheet, you may delete the tab from SecureSheet. When you delete a tab in a SecureSheet, you cannot restore it without having a back-up. Make sure to take a full export of your SecureSheet for reference before deleting a tab.

> **NOTE:** You may have an Excel file that has more tabs than you are managing through SecureSheet. Sometimes a tab may be imported to SecureSheet initially and end up not being used in SecureSheet. You may want to include only necessary tabs SecureSheet to support the processes you are running through it.

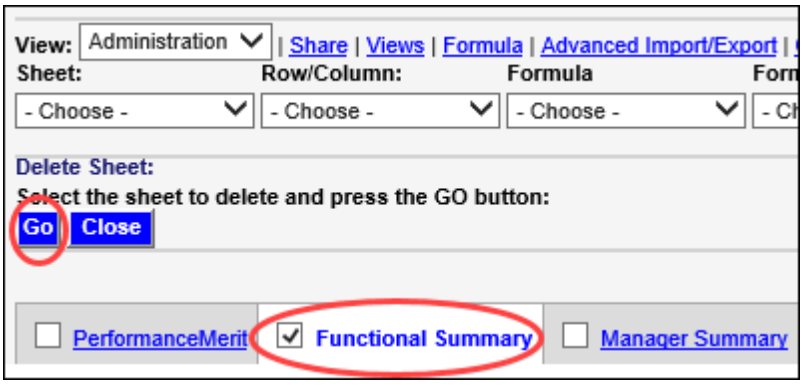
Deleting a Tab/Sheet in SecureSheet

1. Login to SecureSheet.
2. Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Select **Administration** from the **View:** drop-down.

4. Select **Delete Sheet** from the **Sheet:** drop-down.



5. Select the sheet that you want to delete from SecureSheet (e.g., the Functional Summary tab will be deleted in example below).
6. Click **Go**.



Formatting a SecureSheet Online

When a SecureSheet is Active and end users are entering data, sometimes it is easier to make minor formatting adjustments online through the Administration view versus locking the SecureSheet for maintenance using the Import/Export tool.

SecureSheet administrators may perform the following adjustments through SecureSheet's online Administration tools:

- Insert or Delete Columns
- Adjust Column Widths
- Format Cells
- Merge and UnMerge Cells
- Protect Cells
- Change the Name of a Tab in SecureSheet

Video Resources:

- Insert or Delete Columns
- Adjust Column Widths
- Format Cells
- Merge and Unmerge Cells
- Protect Cells

Insert or Delete Columns

A scenario may arise during setup where you need to insert a column(s) or delete a column(s) in a SecureSheet after the view design and user security is already in process or initially setup, or when a

SecureSheet is live.

Key Points:

- Matching the column structure (i.e., the number of columns) online first preserves the column settings and security setup in each view.
- If you need to insert a column(s) or delete a column(s), adjusting online first is important so that the existing column settings and security setup shifts with the insert or deletion.
- Then, after importing your updates from Excel, the only column settings that have to be adjusted in the views are for any newly inserted columns.

If the scenario requires you to insert a column between two data columns (versus at the end of the data set), you may do so using the Administration tools.

- The same number of columns have to exist in SecureSheet as exist in the Excel file you are importing from.
- If you re-purpose a column or adjust the order of the columns, and it does not require an additional column, you may update the column order in excel and import with no impact to the structure of the SecureSheet.

The last three columns in each tab in your SecureSheet are the row audit columns. These are system-generated columns that audit row changes. They will always be at the end of the data set after the last column in a tab. You can insert more columns to have on reserve if your last column is right next to the audit columns.

- When the SecureSheet was first created, there were extra 25 columns added to the right of the last data column (on the main planning tab).
  - If the scenario allows for the extra column to be at the end of the data set, use one of those extra columns.
- If the data is already at or will run over the last spare column, insert column(s) before importing.
  - Check all tabs that you are updating because it is important not to overwrite the last three system-generated audit columns on each tab.
- After inserting or deleting column(s), export from SecureSheet. Then when you import, the contents you add in Excel will overlay the existing SecureSheet.

During the setup phase of Year 2 and Beyond, since the views and security are already setup in SecureSheet, make any column adjustments to the model online first to match any changes to the model before you import an updated excel file.

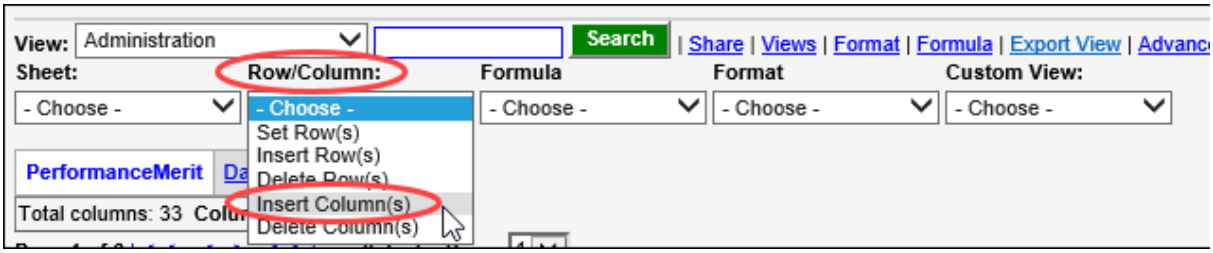
- If you are in the setup phase of Year 2 and Beyond, before inserting and deleting columns, reset rows so that the structural changes can be made faster across just a few rows of data versus your entire data set (which you will refresh before opening up your next planning cycle).

Video Resources:

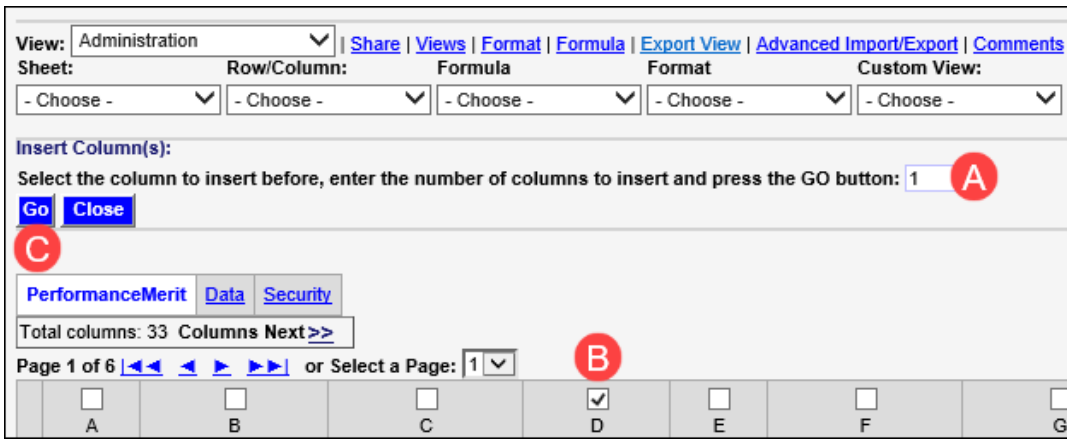
- Insert or Delete Columns

Inserting a Column into a SecureSheet

1. Login to SecureSheet.
2. (If you are working with an Active SecureSheet) Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. Export Values/Formulas/Formats to have an offline reference of the latest working copy of the current SecureSheet.
4. In SecureSheet, go to the tab where you want to insert a column(s).
5. Select **Administration** from the **View:** drop-down.
6. Select **Insert Column(s)** from the **Row/Column** drop-down.



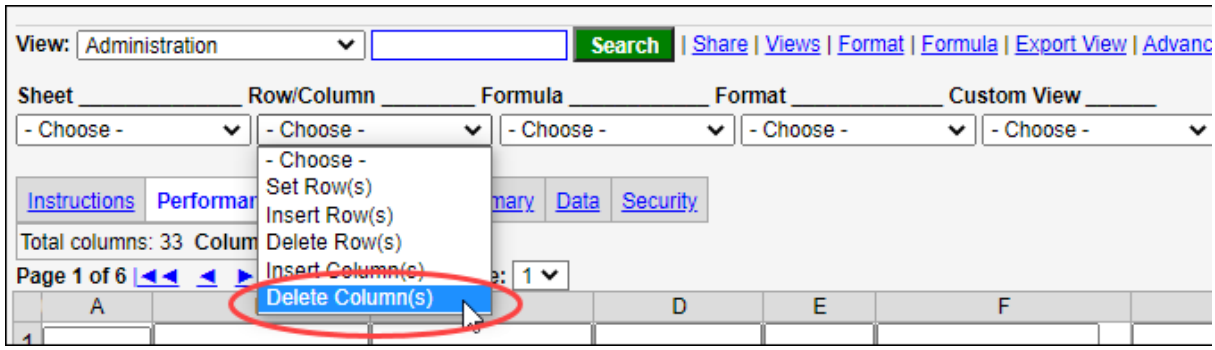
7. Set up the column insertion:
   A. Enter the number of columns you want to insert
   B. Select the box above the column you want to insert before.
   C. Click **Go**.



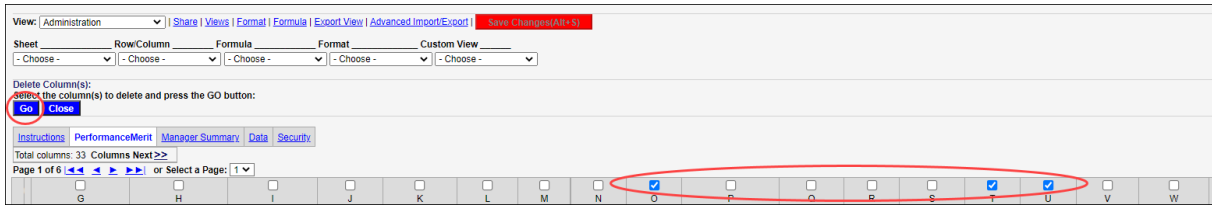
8. Click **Close**.
9. Export Values/Formulas/Formats to have an offline copy of SecureSheet with your newly inserted columns.
10. In the exported Excel file, make the required changes, and save the file under a new name (the exported file you began the process with should be your back-up).
11. In SecureSheet, Import Values/Formulas/Formats and select All Properties and All Sheets. This import will overlay the SecureSheet with the new content of your Excel file.
12. Verify your changes after import. Check your views to make sure the newly inserted column is set to Locked, UnLocked, or Hidden as required in each view.
13. Protect the header cells for the newly inserted columns (you will see the beveled edge around them if they are not protected).
14. Take the SecureSheet off Maintenance Lock.

Deleting Column(s) in a SecureSheet

1. Login to SecureSheet.
2. (If you are working with an Active SecureSheet) Lock the SecureSheet for maintenance. This informs other administrators that someone is doing significant sheet maintenance.
3. In SecureSheet, go to the tab where you want to delete a column(s).
4. Select **Administration** from the **View:** drop-down.
5. Select **Delete Column(s)** from the **Row/Column** drop-down.



6. Select the column(s) you want to delete.
7. Click **Go**.



8. Click **Close**.
9. Take the SecureSheet off Maintenance Lock.

Format Cells

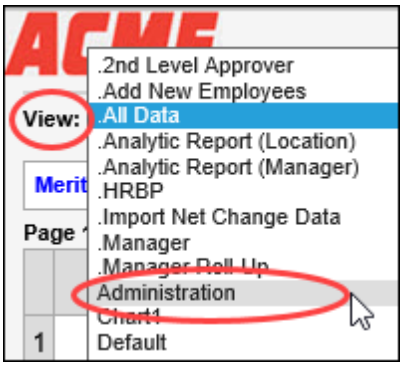
When SecureSheet is live, administrators may have minor adjustments to make to cell formats. Administrators may use the **Format Cells** administrator tool in SecureSheet while the sheet is live, and users are active – instead of exporting and importing for minor updates. If you are planning maintenance on the sheet and will be locking, exporting and importing updates, and the cell format updates are not urgent, you may want to consider holding to make them in Excel during the maintenance period.

Video: Format Cells

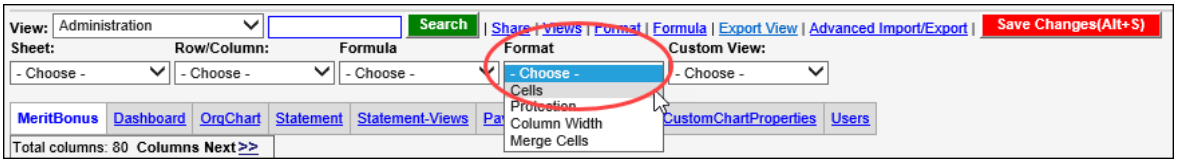
Formatting Cells

Follow these instructions to format cells online in your SecureSheet:

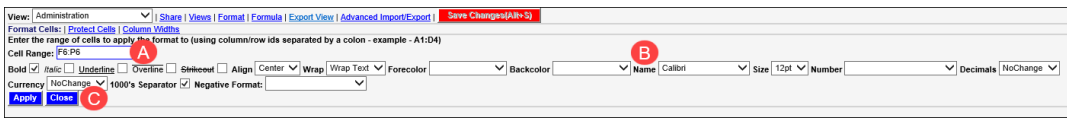
1. Login to SecureSheet.
2. Select the SecureSheet from your home page.
3. Go to the appropriate sheet in your SecureSheet where you want to format cells.
4. Select **Administration** from the **View** drop-down.



5. Select **Cells** from the **Format** drop-down.



6. The Format Cells options will appear.
    A. Enter the **Cell Range** that you want to format, for example, G10:H5000. Be sure to use a colon to delimit the cell range that you want to format.
    B. Select the formatting options that you want to apply to the cell range. The formatting options include:
    Bold
    Italic
    Underline
    Overline
    Strikeout
    Align
    Wrap
    Forecolor
    Backcolor
    Name (font)
    Size
    Number
    Decimals - if you need to update decimals, please select another option (even if it is one you are not changing, like Align, Name or Number) to help SecureSheet identify this formatting change
    Currency
    1000's Separator
    Negative Number Format
    C. Click **Apply** then click **Close** to return to the Administration view.



Notes about Formatting Cells

- Formatting updates are applicable across all views in SecureSheet.
- If you apply formatting changes online in SecureSheet, Export Values/Formulas/Formats to

get the most recent Excel version.

- If you don't export to start with the most recent Excel version when you intend to make updates off-line, you will overwrite changes that were made online in SecureSheet. Always export first to get the most recent Excel version.

- If you export and make formatting changes off-line in Excel, select the Formats option when you are importing, and be cautious not to select the formulas and values options on the import so you do not overwrite updates made by your users.

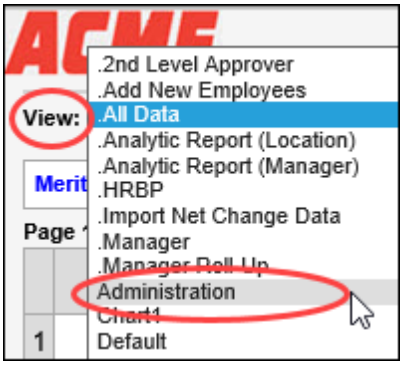
Merge and UnMerge Cells

When SecureSheet is live, administrators may have minor adjustments to make to merged cells – needing to merge or unmerge. Administrators may use the **Merge Cells** administrator tool in SecureSheet while the sheet is live, and users are active – instead of exporting and importing for minor updates. If you are planning maintenance on the sheet and will be locking, exporting and importing updates, and the merge cell updates are not urgent, you may want to consider holding to make them in Excel during the maintenance period.

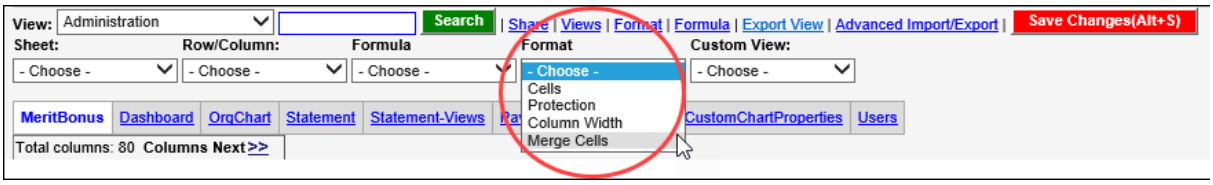
Video: Merge and Unmerge Cells

Merging and UnMerging Cells

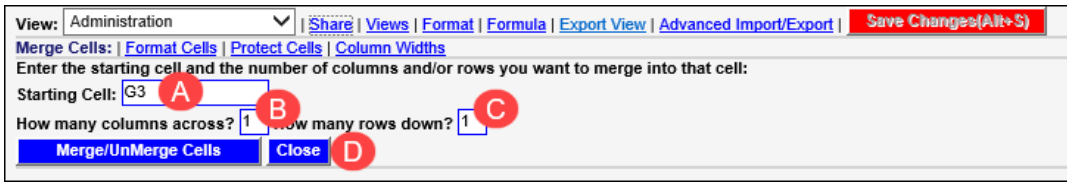
1. Login to SecureSheet.
2. Select the SecureSheet from your home page.
3. Go to the appropriate sheet in your SecureSheet where you want to adjust column widths.
4. Select **Administration** from the **View** drop-down.



5. Select **Merge Cells** from the **Format** drop-down.



6. The **Merge Cell** options will appear.
   A. Enter the **Starting Cell** you want to merge or unmerge.
      NOTE: If you are unmerging cells, skip to **Step D**.
   B. Enter **How many columns across?** you want to merge.
   C. Enter **How many rows down?** you want to merge (if applicable).
   D. Click **Merge/UnMerge Cells** then click **Close** to return to the Administration view.



Notes about Merging and UnMerging Cells

- Updates to merged cells (merging or unmerging) are applicable across all views in SecureSheet.
- If you merge/unmerge cells online in SecureSheet, Export Values/Formulas/Formats to get the most recent Excel version.
    - If you don't export to start with the most recent Excel version when you intend to update off-line, you will overwrite changes that were made online in SecureSheet. Always export first to get the most recent Excel version.
- If you export and make column width adjustments off-line in Excel, select the Merged Cells option when you are importing, and be cautious not to select the formulas and values options on the import so you do not overwrite updates made by your users.

Protect Cells

Cells may have protection applied to them in SecureSheet, which prohibits changes from being made to those cells. Typically, header rows and column label row(s) have protection applied to them through the Protect Cells tool in SecureSheet.

Only SecureSheet administrators may protect/lock and unprotect/unlock cells.

When you create your SecureSheet without borders and you apply the cell borders property to a View, any unlocked and unprotected cells will have a border around them.

Header cells will not be locked unless you (or another SecureSheet administrator) lock them, so if you see cell borders around your header or label rows, they need to be protected/locked for only your border formatting (from Excel) to remain.

Unlocked or unprotected cells look like this (there is a beveled edge around them):

J	K	L	M
Guidelines			
Exceeds 0% - 6%			
Meets 0% - 2.5%			
Below 0%			
First Name	Last Name	Hire Date	Current Salary

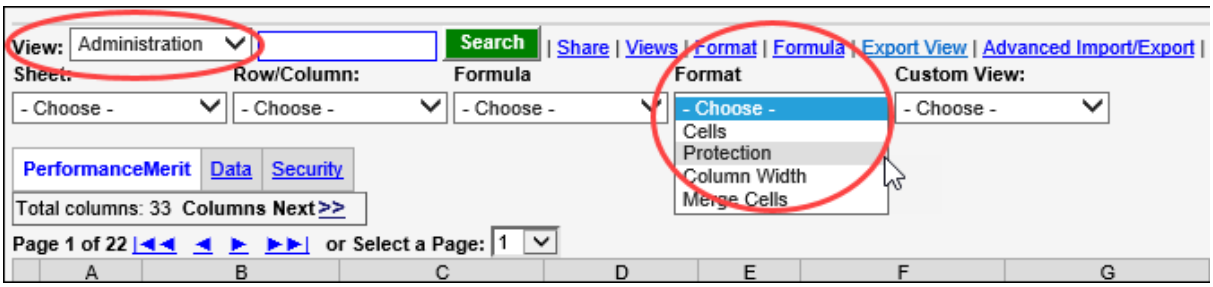
Locked or protected cells look like this:

J	K	L	M
Guidelines			
Exceeds 0% - 6%			
Meets 0% - 2.5%			
Below 0%			
First Name	Last Name	Hire Date	Current Salary

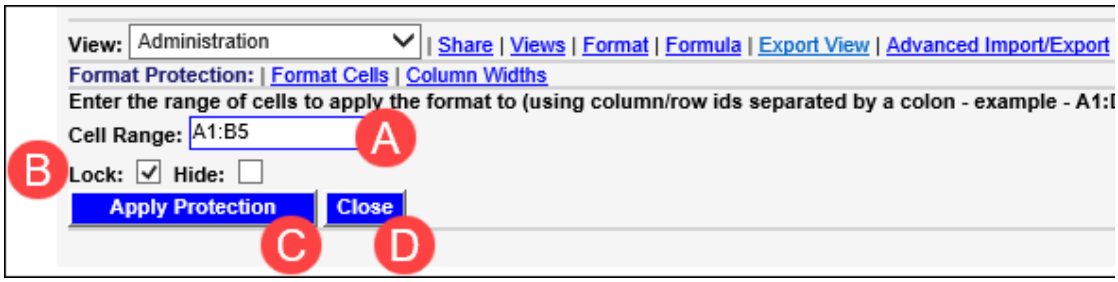
Video: Protect Cells

Protect/Lock Cells

1. Select **Administration** from the View drop-down.
2. Select **Protection** from the **Format** drop-down.

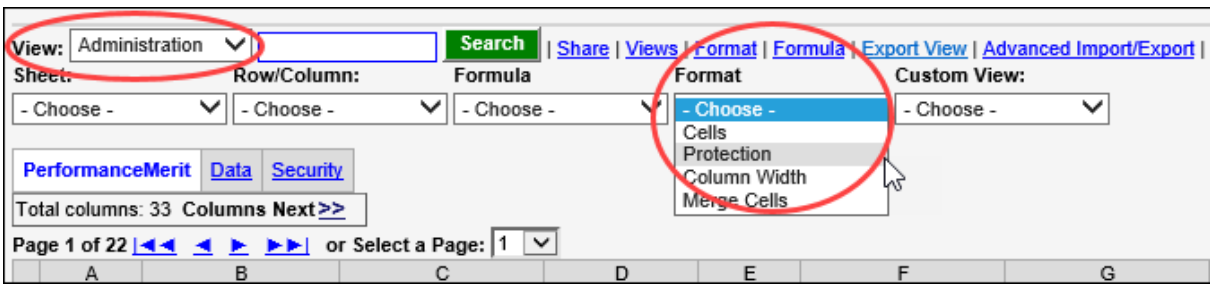


A. Enter the **Cell Range:** that you want to lock/protect. Include all header rows.
B. Check **Lock**.
C. Click **Apply Protection**.
D. Click **Close.**



UnProtect/Unlock Cells

1. Select **Administration** from the View drop-down.
2. Select **Protection** from the **Format** drop-down.

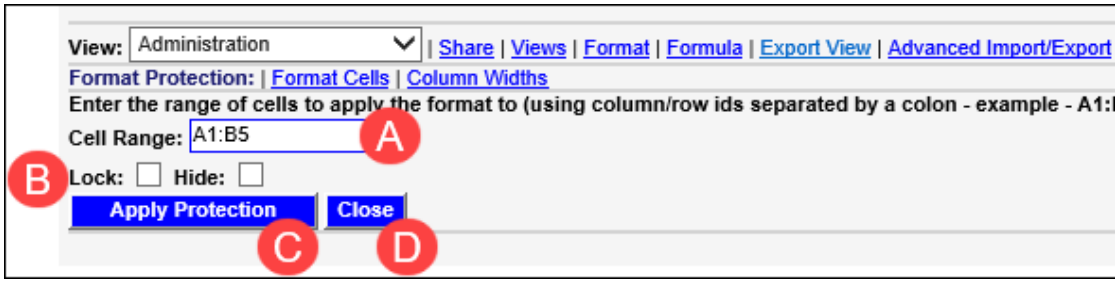


A. Enter the **Cell Range:** that you want to unlock/unprotect. Include the entire cell range you may want to update.

B. Leave **Lock** unchecked.

C. Click **Apply Protection**.

D. Click **Close.**



3. Edit the cells you want to update. Use the Administration view or your All Data (Edit) view to make the updates.
4. Protect/Lock the cells to prohibit them from being updated by end users.

NOTE: Because header rows are protected, if you import and expected border changes to take affect, they might not if the cells were not unprotected before import. You do not need to unprotect header cells to make value, formula or format changes to them.

Adjust Column Widths

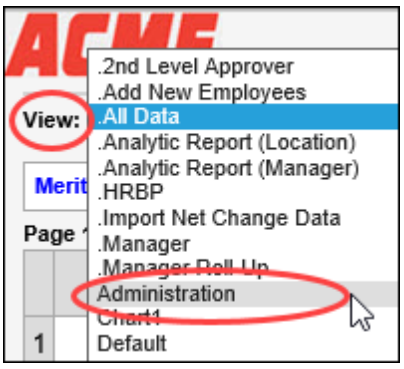
When SecureSheet is live, administrators may have minor adjustments to make to column widths. Administrators may use the **Column Widths** administrator tool in SecureSheet while the sheet is live, and users are active – instead of exporting and importing for minor updates. If you are planning maintenance on the sheet and will be locking, exporting and importing updates, and the column width updates are not urgent, you may want to consider holding to make them in Excel during the maintenance period.

Video: Adjust Column Widths

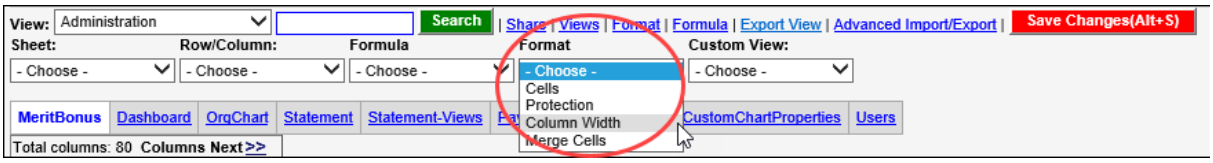
Adjusting Column Widths

Follow these instructions to adjust column widths online in your SecureSheet:

1. Login to SecureSheet.
2. Select the SecureSheet from your home page.
3. Go to the appropriate sheet in your SecureSheet where you want to adjust column widths.
4. Select **Administration** from the **View** drop-down.



5. Select **Column Width** from the **Format** drop-down.

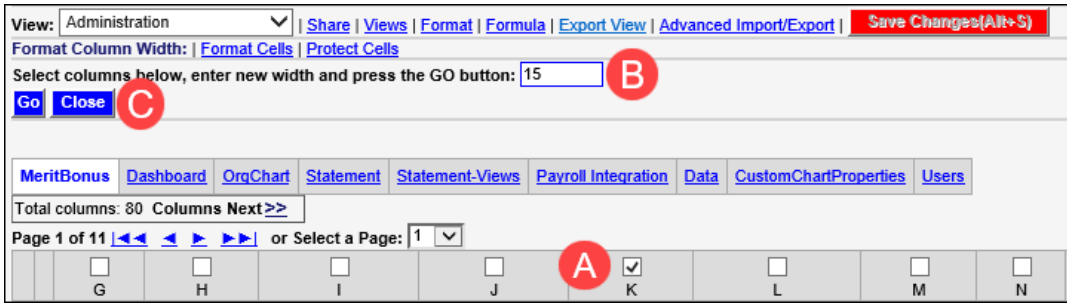


6. The **Column Width** options will appear.

   A. Select the check box(es) above the **column letter(s)** that you want to adjust.

   B. Enter the column width you want to adjust to.

   C. Click **Apply** then click **Close** to return to the Administration view.



Notes about Adjusting Column Widths

- Column width updates are applicable across all views in SecureSheet.
- If you adjust column widths online in SecureSheet, Export Values/Formulas/Formats to get the most recent Excel version.
  - If you don't export to start with the most recent Excel version when you intend to update off-line, you will overwrite changes that were made online in SecureSheet. Always export first to get the most recent Excel version.
- If you export and make column width adjustments off-line in Excel, select the Column Widths option when you are importing, and be cautious not to select the formulas and values options on the import so you do not overwrite updates made by your users.

How Cell Notes Look in SecureSheet

Some spreadsheets are designed with notes in certain cells to give end users additional information. If your spreadsheet uses the Notes feature in Excel, they will import into SecureSheet with a question mark in the cell. Users can click the question mark and the respective NOTE will open in a new browser tab titled **View Cell Comments**. Excel cell Comments will not import into SecureSheet.

The Import/Export tool allows administrators to import cell Notes (which is the Comments property on the import page).

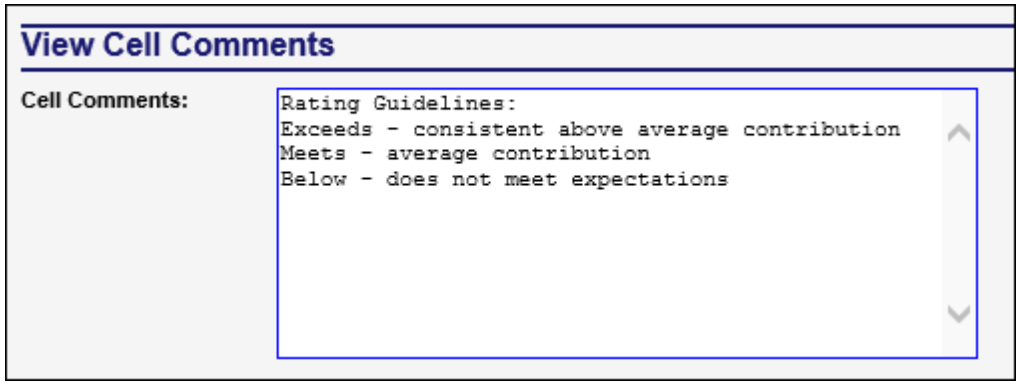
Cell Notes in SecureSheet

This is how cell notes from Excel will look and function in SecureSheet.

- When a cell has an associated note, you will see a question mark in the cell.

P	Q
	Merit Budgets
Available	$228,266
Used:	$10,617
Remaining:	$217,649
Title	Rating ?
Sr Product Engi	
Quality Assuran	Exceeds
Product Enginee	Exceeds
Engineering Sup	Exceeds
Financial Analy	Exceeds
Senior Lean Pro	Exceeds
Manufacturing E	Exceeds
Document Contro	Meets
Supv, EH&S	Meets
Drafter	Meets
Mgr, Technical	Below
HR Generalist 3	Below
Sr Mgr, Busines	Below

- When you click the question mark, a new browser tab will open with the notes. You can close this browser tab without impacting your main SecureSheet browser tab.



Reset Rows

In the setup phase for Year 2 and Beyond, it is important to preserve the column settings and security that are already setup in SecureSheet, so any column additions or deletions to the model will be made online first before you import an updated Excel file.

Before inserting and deleting columns, reset rows so that the structural changes can be made faster across just a few rows of data versus your entire data set (which you will refresh before opening up your next planning cycle).

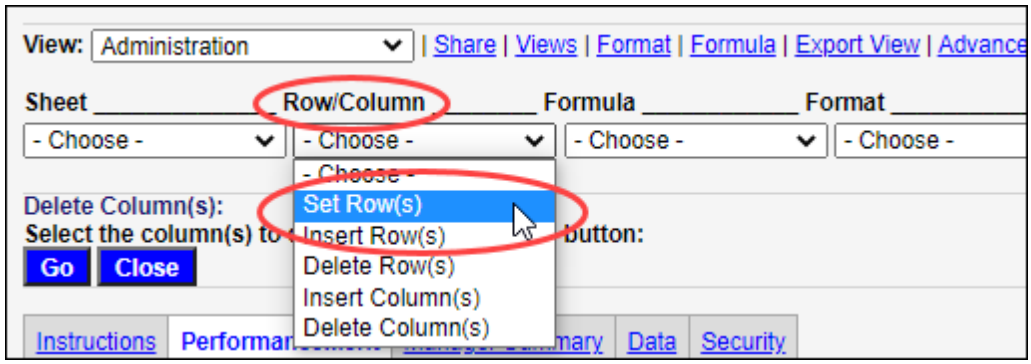
> **Note:** Make sure you have a copy or an export of your prior SecureSheet for reference before resetting rows. Reset rows clears cell history. **Do not** reset rows to add rows to an active SecureSheet. If you need to add rows to an active SecureSheet, use the view created

specifically for adding rows to an active SecureSheet. If you do not have a view to do so and need assistance setting one up, contact the SecureSheet support team.

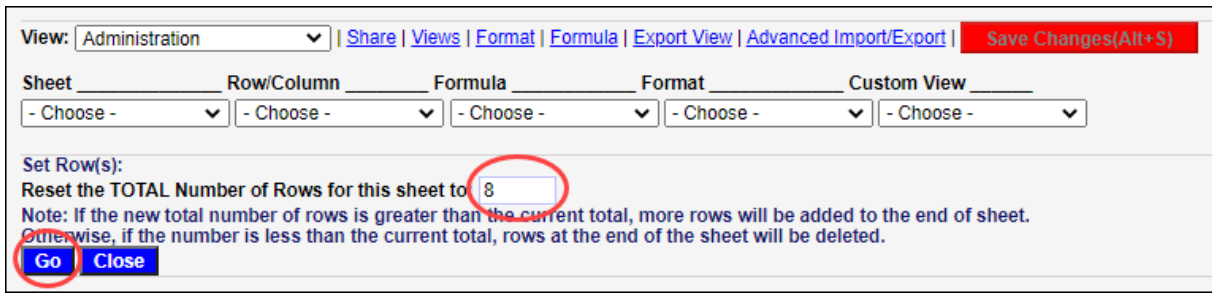
Note: Another way to clean up or update rows offline - when you are not concerned about preserving cell history (either during or after a planning cycle)- is to lock the SecureSheet, export, delete unneeded rows, import and unlock the SecureSheet.

Resetting Rows in a SecureSheet

1. Login to SecureSheet.
2. Select **Administration** from the **View:** drop-down.
3. Select **Set Rows** from the **Row/Column** drop-down.



4. Enter the number of rows you want to reset this SecureSheet to (typically 1 or 2 rows beneath the row with your column headings to preserve the formulas in your data rows):



5. Click **Go**.
6. Click **Close**.
7. Insert/delete columns as necessary.
8. Export from SecureSheet and refresh your data for the next cycle. Make sure to roll your formulas down the entire length of your data rows.
9. Import your updates to SecureSheet.

SecureSheet Site Management

Your organization has its own SecureSheet site where you manage your SecureSheet files. There are three main areas on your site where files are stored: Active SecureSheets, Hidden SecureSheets, and Archived SecureSheets. Different scenarios may occur where the implementation team needs to consider the best location to store a SecureSheet. The three areas are defined as:

- **Active SecureSheets** – When a SecureSheet is in the Active SecureSheets area, it is accessible by end users who have been shared to it and can login to SecureSheet,

who are not SecureSheet administrators. This is the location for all “live” SecureSheets.

- When a SecureSheet is in the Active area, any user who has either a password for or an internal SSO link to SecuresSheet (based on your organization set-up), and who is shared to Views within the SecureSheet, may login and access their View(s).

- **Hidden SecureSheets** – When a SecureSheet is in the Hidden SecureSheets area, it is only accessible to users who have been give SecureSheet System Administration permission. It is not accessible by end users.
- **Archived SecureSheets** – For cycles managed in SecureSheet Year 2 and beyond, the final files from the previous year are stored in the Archived SecureSheets area. Due to the Data Security Policy and GDPR requirements followed by SecureSheet, SecureSheet will only store files one year back. Any older files or unneeded copies of files may be deleted to comply with SecureSheet policies.

- At any time, you may export your SecureSheet(s) and store it locally as a back-up. Also note that you may export Sharing and Views from the Import/Export Options to have a complete picture of your SecureSheet at any point in time.

- SecureSheet makes a backup every morning at 4:00AM Eastern Standard Time. That backup may be recovered for up to seven (7) days.

- You will move your files around the areas of your site, as well as potentially make copies of or delete a SecureSheet. Tasks you may perform include:
  - Accessing Active, Hidden, and Archived Areas of Your Site
  - Hiding or Archiving a SecureSheet
  - Moving a Hidden SecureSheet to Active
  - Copying a SecureSheet
  - Renaming a SecureSheet
  - Deleting a SecureSheet
  - Attaching a file to File Attachments in SecureSheet (to securely share an excel file with the SecureSheet Support Team)
  - Highlight the Name of a SecureSheet
  - Update Your Organization's Private Label Information
  - End of a Cycle Process

Upload to File Attachments in SecureSheet

The File Attachments area in SecureSheet is a secure file sharing tool that allows:

- Sharing your initial Excel model with the SecureSheet Support team
- Sharing end user instructions from within your SecureSheet
- Storing images that are used to produce statements at the end of your planning cycle

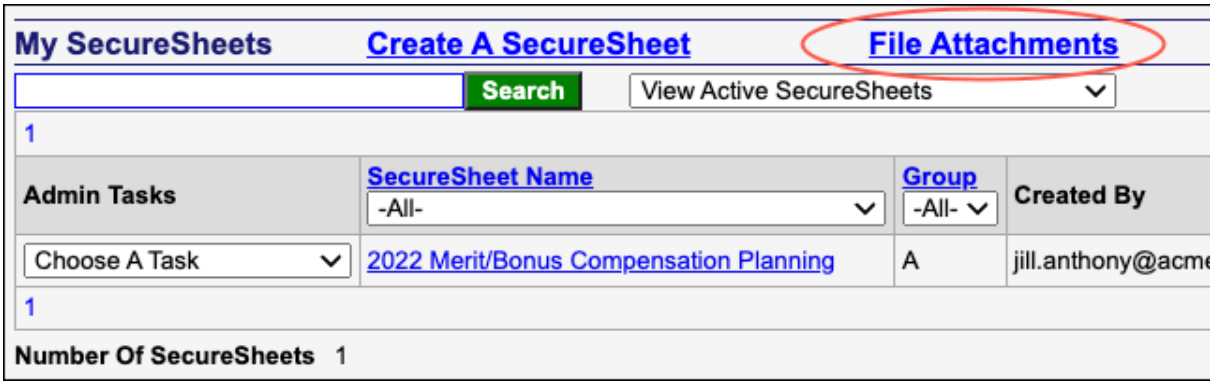
Initially, there will be two folders in your File Attachments: files and images.

- The files folder allows excel and pdf files to be uploaded. Excel files must be password protected.
- The images folder allows png and jpg files to be uploaded. This folder stores your site logo and

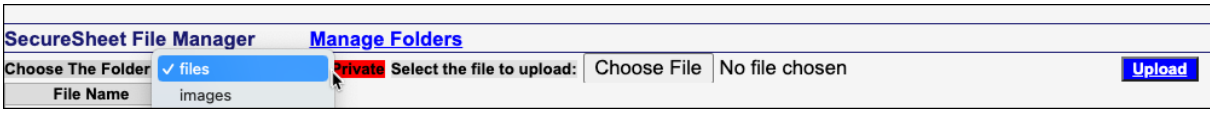
any other image files required on your statements.

Upload a File

1. Login to SecureSheet.
2. On the My SecureSheets home page, click **File Attachments**.



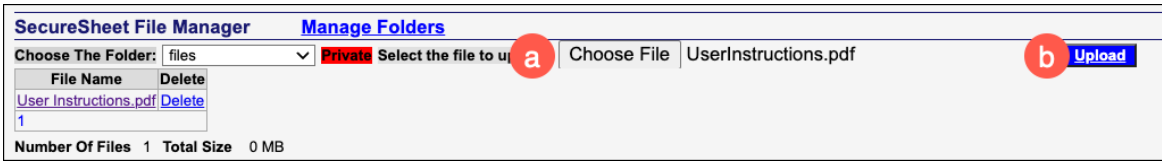
3. Select the Files or Images folder from the **Choose The Folder:** dropdown. This is the folder that you want to upload a file into (Excel or .PDF files into Files, .png or .jpg files into Images).



4. Find the file that you want to upload to the site:

   a. Click **Choose File**. Your file system will appear. Select the file you want to upload. The file name will appear next to the Choose File button.

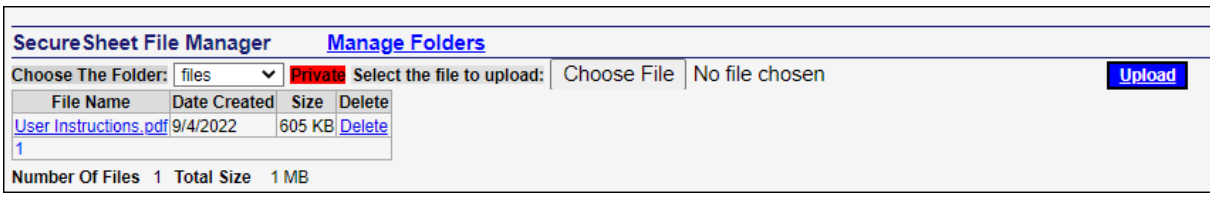
   c. Click **Upload**. Your file will appear in the **File Name** list.



Email the SecureSheet Support Team to inform that you have uploaded a file for review.

Download a File

1. Login to SecureSheet.
2. On the My SecureSheets home page, click **File Attachments**.
3. Select the file you want to download from the **File Name** list.



4. Depending on your browser, your open and save options will appear and you may open and/or save the file.

   NOTE: When you download the file, it will have an .aspx or an .aspx.pdf file extension when it

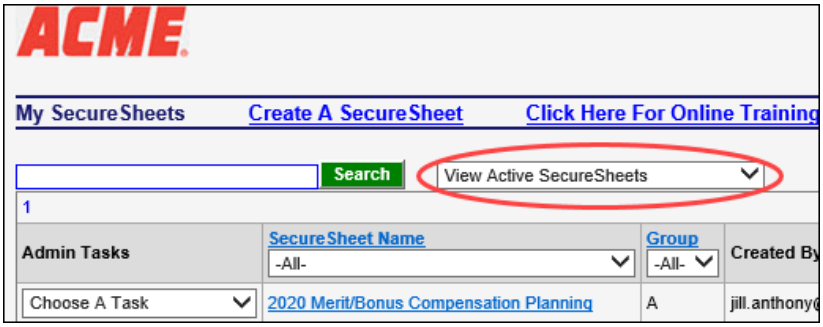
is downloaded, and the file name will be from the file export. It will not be the name of the file as it is stored in the Files or Images folder in SecureSheet. You may go to your Downloads folder in the file system and rename the file to change the extension from .aspx.pdf to .pdf or .xlsx. The file will then open with the associated application for that file extension.

Access Active, Hidden, and Archived SecureSheets

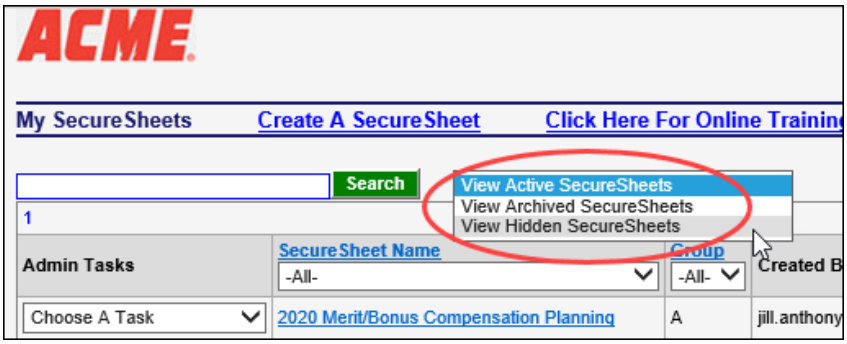
As you move SecureSheets from one area of your site to another, you will need to access them by getting to the respective area in which they are located.

Accessing Active, Hidden, and Archived SecureSheets

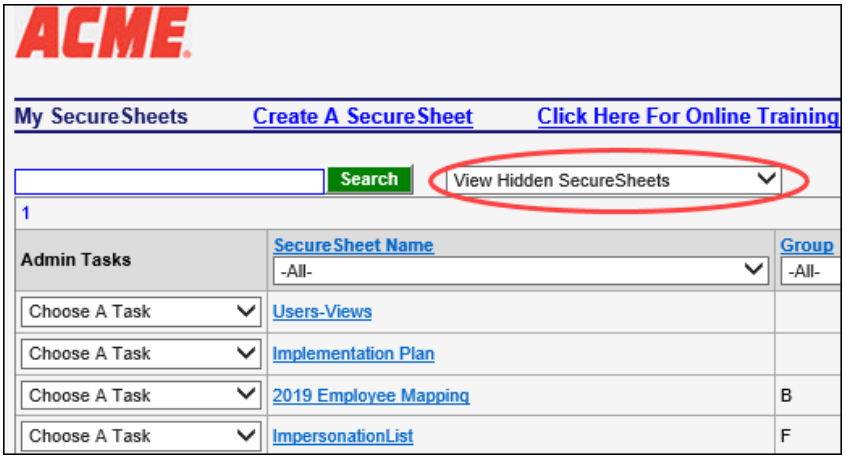
1. From your SecureSheet Home Page, select the **View Active SecureSheets** drop-down.



2. Select **View Hidden SecureSheets** or **View Archived SecureSheets** to access the SecureSheets in either area of your site.



3. You will move to the area of your site as selected and you will see the SecureSheets that are stored in that area.



4. Select **View Active SecureSheets** to move back to the SecureSheets that are live in your

organization.

Links to SecureSheet Site Management Tasks:

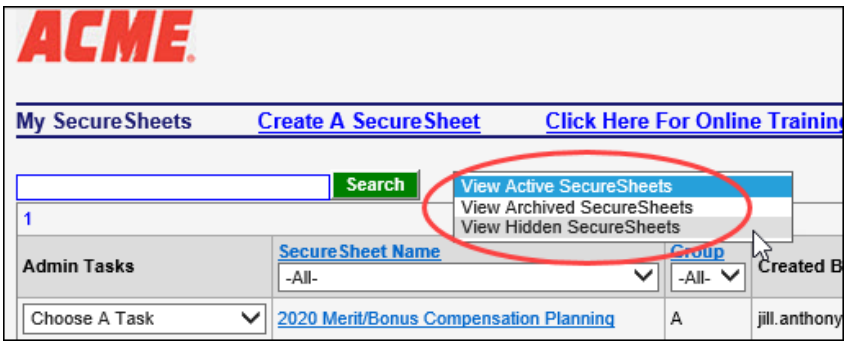
- Hiding or Archiving a SecureSheet
- Moving a Hidden SecureSheet to Active
- Copying a SecureSheet
- Renaming a SecureSheet
- Deleting a SecureSheet

Move a Hidden SecureSheet to Active

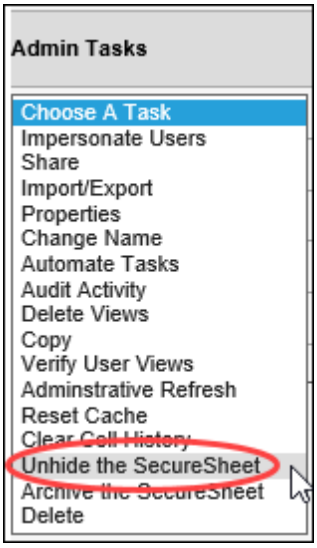
You can move a SecureSheet from the Hidden SecureSheets or Archived SecureSheets areas of your site. Moving a SecureSheet from Hidden - or unhiding a SecureSheet - puts the SecureSheet in the Active SecureSheets section of your site, which is accessible to any end users who are shared to it. You will unhide a SecureSheet each time you have been working on a hidden SecureSheet that is ready to go-live for end users.

Moving a Hidden SecureSheet to Active

1. Select View Hidden SecureSheets from the drop-down.



2. Select **Unhide the SecureSheet** from the **Admin Tasks** drop-down next to the SecureSheet you want to make Active.



The SecureSheet will move to the Active SecureSheets area of your site, and it will be accessible

to end users who have been shared to it.

NOTE: Follow similar steps to move a SecureSheet from the Archived SecureSheets area of your site; start in the Archived SecureSheets area and select UnArchive SecureSheet from the Admin Tasks drop-down.

Links to SecureSheet Site Management Tasks:

- Hiding or Archiving a SecureSheet
- Copying a SecureSheet
- Renaming a SecureSheet
- Deleting a SecureSheet

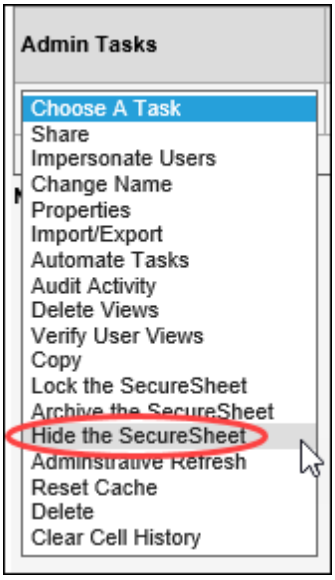
Hide or Archive a SecureSheet

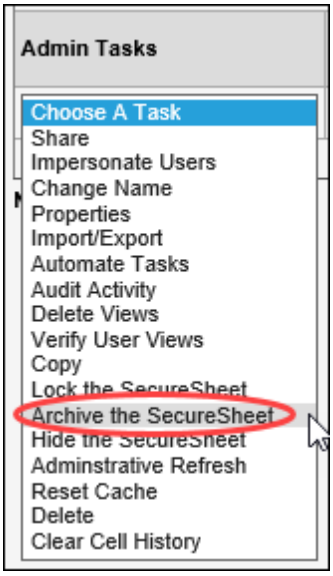
You can move SecureSheets from one area of your site to another if you want to hide a SecureSheet from end users or if you are done with a cycle and ready to archive the SecureSheet until the next cycle.

Hiding or Archiving a SecureSheet

From the **Admin Tasks** drop-down next to the SecureSheet you want to move:

1. Select **Hide the SecureSheet** to move the SecureSheet to the Hidden SecureSheets section of your site. Only SecureSheet Administrators can see SecureSheets in the Hidden section of your site.
2. Select **Archive the SecureSheet** to move the SecureSheet to the Archive SecureSheets section of your site. Only SecureSheet Administrators can see SecureSheets in the Archive section of your site.





The SecureSheet will move to the area you selected, respectively.

Links to SecureSheet Site Management Tasks:

- Moving a Hidden SecureSheet to Active
- Copying a SecureSheet
- Renaming a SecureSheet

- Deleting a SecureSheet

Copy a SecureSheet

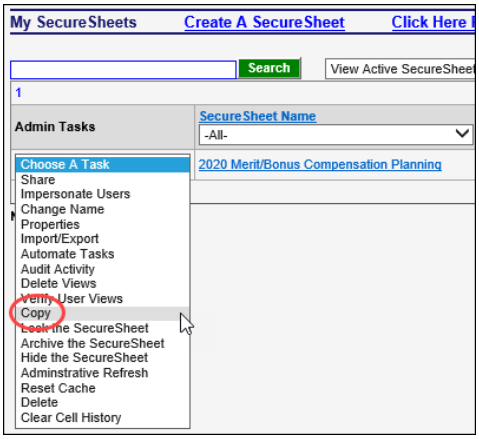
You may need to make a copy of a SecureSheet in the following scenarios:

- If your implementation team plans to train managers, you may want to make a copy of your SecureSheet when it is close to go-live and load it with "dummy" data to use to demo your system during training.
- When you move into the next cycle of compensation planning; after the first year, the typical process is to copy the previous year's SecureSheet as a starting point for the upcoming cycle and rename it accordingly. When working with copies past the first year, you store the previous cycle in the Archive SecureSheets area of your site and keep the cycle you are refreshing in the Hidden SecureSheets area of your site as you work through refreshing it.

Do not make copies of your SecureSheet for back-up purposes. SecureSheet automatically makes back-ups so there is no reason to load your site with unnecessary copies.

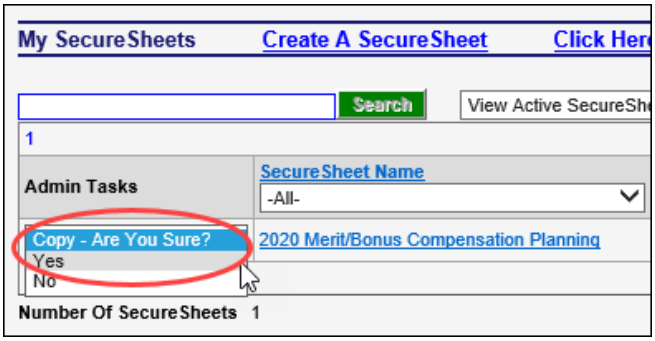
Copying a SecureSheet

1. Login to SecureSheet.
2. Select **Copy** from the **Admin Tasks** drop-down next to the SecureSheet you want to copy.



3. Select **Yes** from the **Copy – Are You Sure?** drop-down to confirm you want to copy the SecureSheet. A copy of your SecureSheet is made and remains in the area of your site where you made the copy from.

   NOTE: If you were working in the **Active SecureSheets** area of your site, hide the SecureSheet while you are preparing it for end user access.



4. Rename the copy of the SecureSheet.

   NOTE: The Sharing and View set-up that was in the SecureSheet you copied is included in

the copy you made. The cell history is not included in the copy.

Links to SecureSheet Site Management Tasks:

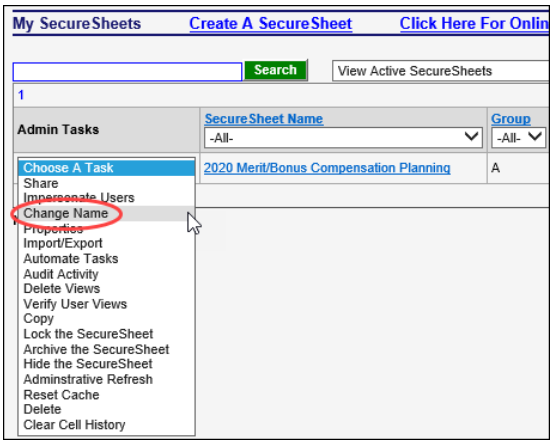
- Hiding or Archiving a SecureSheet
- Moving a Hidden SecureSheet to Active
- Renaming a SecureSheet
- Deleting a SecureSheet

Rename a SecureSheet

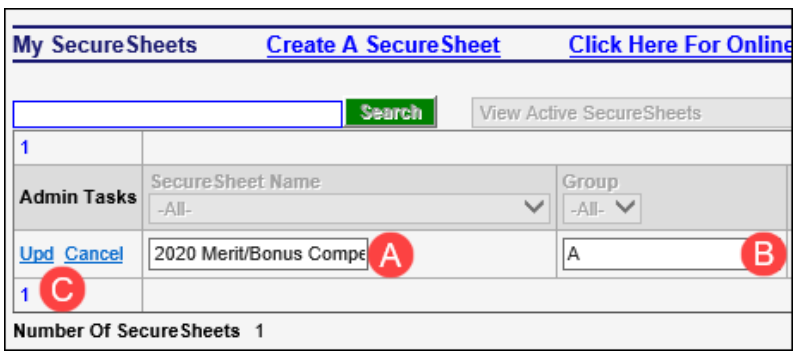
administrators may change the name of any SecureSheet in any area of your organization's SecureSheet site and at any time.

Renaming a SecureSheet

1. Login to SecureSheet.
2. Select **Change Name** from the **Admin Tasks** drop-down next to the SecureSheet you want to rename.



3. Update the Name properties as desired:
   A. Change the **SecureSheet Name**.
   B. Enter/update the **Group**. Group helps to organize SecureSheets that are used for the same project.
   For example, group your compensation SecureSheet and the Users-Views SecureSheet for your Merit cycle with a "Merit" group name, and group your bonus SecureSheet and the Users-Views SecureSheet for your Bonus cycle with a "Bonus" group name.
   C. Click **Upd** to save your changes.



Links to SecureSheet Site Management Tasks:

- Hiding or Archiving a SecureSheet
- Moving a Hidden SecureSheet to Active
- Copying a SecureSheet
- Deleting a SecureSheet

Delete a SecureSheet

When a SecureSheet file goes back farther than one year, you will need to export and save it locally for on-going archive purposes. After you have files exported and saved locally, you may delete the file from SecureSheet.

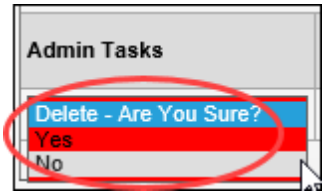
Proceed with caution when deleting a SecureSheet. Confirm that you have exported a local copy for historical purposes.

> **NOTE:** If you need to restore a deleted SecureSheet, there is an incremental support services fee to do so.

If you have any questions before deleting a SecureSheet, contact help@securesheet.com for assistance.

Deleting a SecureSheet

1. Select **Delete** from the Admin Tasks drop-down next to the SecureSheet you want to delete.
2. Select **Yes** or **No** from the **Delete – Are You Sure?** drop-down to confirm your intent to delete the SecureSheet completely from your site.



Links to SecureSheet Site Management Tasks:

- Hiding or Archiving a SecureSheet
- Moving a Hidden SecureSheet to Active
- Copying a SecureSheet
- Renaming a SecureSheet

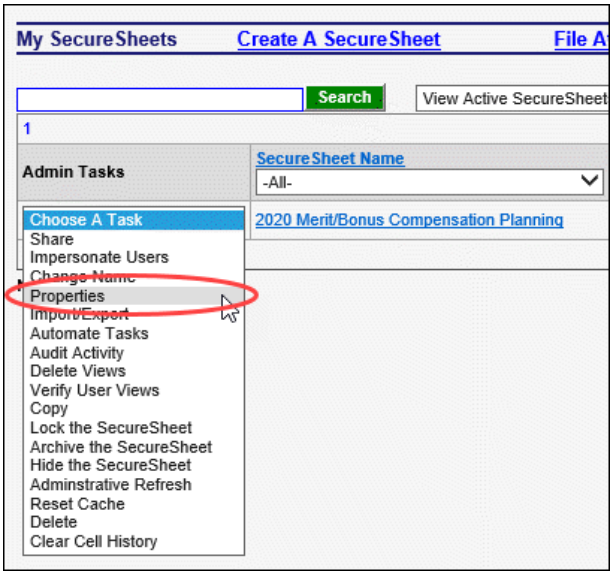
Highlight the Name of a SecureSheet

If you are managing multiple projects in SecureSheet at once, it may be helpful to highlight the background of each SecureSheet on the SecureSheet home page.

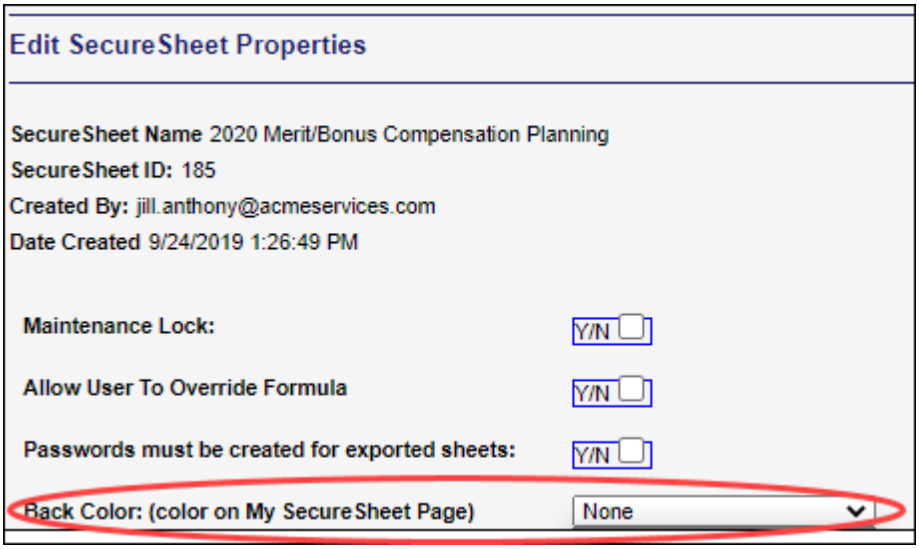
The only downside to highlighting the SecureSheet name is that the Maintenance Lock or SecureSheet Lock visual indicators of yellow and red will not be visible should you lock a SecureSheet for maintenance purposes. This is an important note for maintenance communication coordination if you have multiple administrators working on SecureSheet and you have used background highlighting to distinguish multiple projects.

Highlighting the Background Name of a SecureSheet

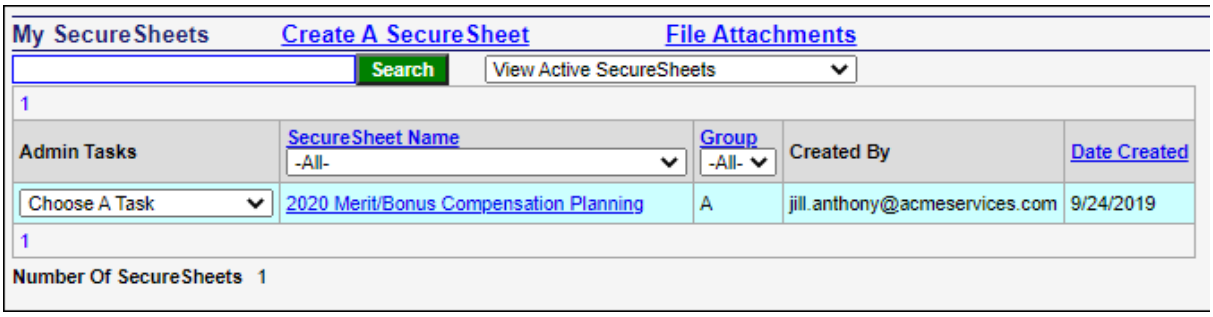
1. Select **Properties** from the Admin Tasks drop-down.



2. Select a color from the **Back Color: (color on My SecureSheet Page)** drop-down.



3. Click **Apply**.
4. Click**<< Go Back**. Your SecureSheet will have the background color you selected.



End of Cycle Process

When you reach the end of the cycle with a specific SecureSheet, you determine which users (if any) besides administrators need to access the SecureSheet in the off-cycle months.

User Permissions at End of Cycle

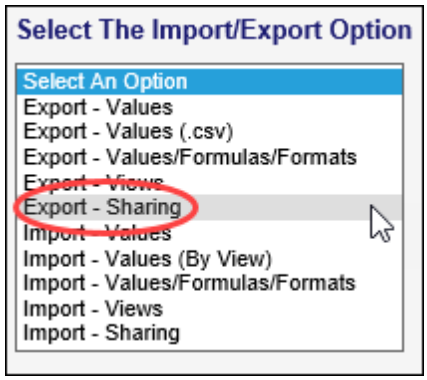
Take one of the following steps based on the scenario in your organization:

- When **only** SecureSheet administrators need access to the SecureSheet in the off-cycle months, hide the SecureSheet.

  NOTE: For compliance purposes, SecureSheet will only store files one year back.

- Sometimes HR team members (or another group of users) are active in a SecureSheet through the off-cycle months.
  - In this case, you would arrange for licenses for their continued access.
  - Leave the SecureSheet in the Active section of your site.
  - For all team members who do not need to access SecureSheet in the off-cycle months, change the email addresses in the Users tab in the Users-Views SecureSheet.
    - Place an 'x' at the front or at the end of the email address. No rows will return in their views if they happen to login.
    - This approach continues to consume a user license should a user who does not need access to SecureSheet happen to login.

  OR
  - Remove the users from Sharing.
    - If you do this, first export sharing (from the Import/Export options) and save the exported sharing file for future reference.



Site Clean Up

Keep your site easy to manage by doing end of cycle clean up:

- Hide the SecureSheet (if you have not already, and if only administrators need access to it in the off-cycle months)
- Archive or delete the Implementation Plan SecureSheet (it is there solely for your use; if you are not using it, you may delete it)
- Delete any other SecureSheets that may have been created through this cycle's setup
- Hide the Users-Views SecureSheet (if not already hidden)

Process Improvements

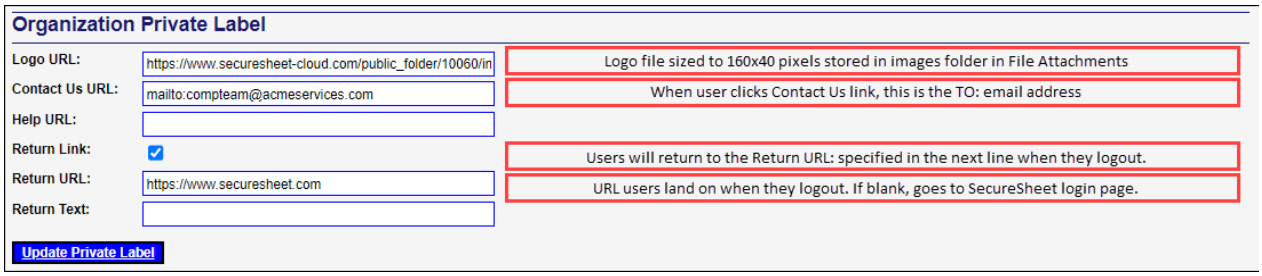
- Capture future revisions / process improvements based on user feedback after go-live.
- Schedule a project debrief to capture insights and lessons learned for future cycles. Email the SecureSheet Support team if you would like to review prior to the next cycle kick-off.
    - Debrief topics may include:
        1. What went well?
        2. What could go better next time?
        3. What were the greatest benefits you found using SecureSheet for your process(es)?
        4. What were the challenges you found using SecureSheet for your process(es)?
        5. What feedback did you receive from your end users?
        6. Is there something you wish you could do in SecureSheet that you haven't done (in support of a process)?
        7. As an administrator, are there tasks in SecureSheet you would like to understand more deeply/thoroughly?
        8. What steps would you like to take proactively in preparation for next year's cycle(s)?

Organization Private Label Information

You may cutomize your SecureSheet site through the options in the Private Label settings, which you will find in the System Administration tools in your site:

Organization Private Label Information

Each of the organization private label settings is optional, and the description of each setting is described as:



- **Logo URL:** This is initially setup by SecureSheet Support and is your organization's logo sized to 160x40 pixels. Your site private label logo file is stored in the images folder in File Attachmenst.
- **Contact Us URL:** This link may be set to any email address that you would like end users to email if they have questions regarding a planning cycle. the syntax of the link must start with mailto: and then may be any valid email address in your organization.
- **Return Link:** If you would like the user to land on a specific URL when they logout of SecureSheet, turn on the checkbox and enter a Return URL in the next field.
- **Return URL:** Set to the URL you would like your users to return to when they click Log Out from their SecureSheet home page.

Set Up Statements

Statement Setup Overview

If you generate a compensation statement (or letter) to your employees at the end of your planning cycle, you may use SecureSheet to replace the tedious task of mail merges and centralized distribution.

SecureSheet will use your statement template and map the values from your main SecureSheet into their respective locations in the statement content. Then, managers may export statements directly from a view in SecureSheet, either individually or in a batch, and distribute to their respective team members.

Statements are built with these main components:

1. Statement tab - each statement has its own tab in SecureSheet where the contents of the statement are stored, as well as any logic to accommodate hiding certain rows based on conditions that exist for different statement scenarios.
2. Default view on the statement tab - identifies the formulas for SecureSheet to calculate during statement export.
3. Statement logic on the main Securesheet tab - the first five columns on the main SecureSheet tab that are reserve for SecureSheet are where the export logic is set up for statements (note - additional columns may be used based on requirements).
4. Statement form view on the main SecureSheet tab - defines the statement tab to reference on export and maps the Unique ID that SecureSheet uses during statement export to pull individual values into the statement.

- As an administrator, when you export your SecureSheet with an existing statement tab, you see

the statement design and logic that is built into the statement tab to work with the default view on the statement tab and the statement form view on the main SecureSheet tab .

- To work with a statement setup example offline that includes links to instructions, click here.

Videos:

- Export Statements
- Set Up Existing Views to Export Statements
- Create Views to Export Statements

Statement Setup Process

The technical design standards covered in the Statement Setup Process are the basis for standard statement development. In some instances, setup for a statement may be modified from these standards to meet specific requirements.

The mapping and design of statements begins when you have solidified the design of your statements.

> **NOTE:** Content tweaks may be implemented if changes are required prior to exporting statements, however, all sections of the statement(s), values, and content paragraphs (if applicable) should be defined prior to beginning any of the tasks identified below for setting up statements.

Tasks and responsibilities for setting up statements:

1. Provide your Statement Template(s) with column mappings and information for inclusion/exclusion scenarios - Client
2. Identify if any employees will not receive statements - Client
3. Design statement(s) into tabs in SecureSheet - SecureSheet Support Team
4. Build logic to map and format values from main SecureSheet - SecureSheet Support Team
5. Build logic to show/hide information based on scenarios provided - SecureSheet Support Team
6. Verify statements and test unique scenarios offline - Client
7. Set up views for end user views to export statements - SecureSheet Support Team / Client

> **NOTE:** Client administrators may perform any/all of the statement setup tasks as desired. The SecureSheet Support Team is available to guide the knowledge transfer of the Statement Setup Process.

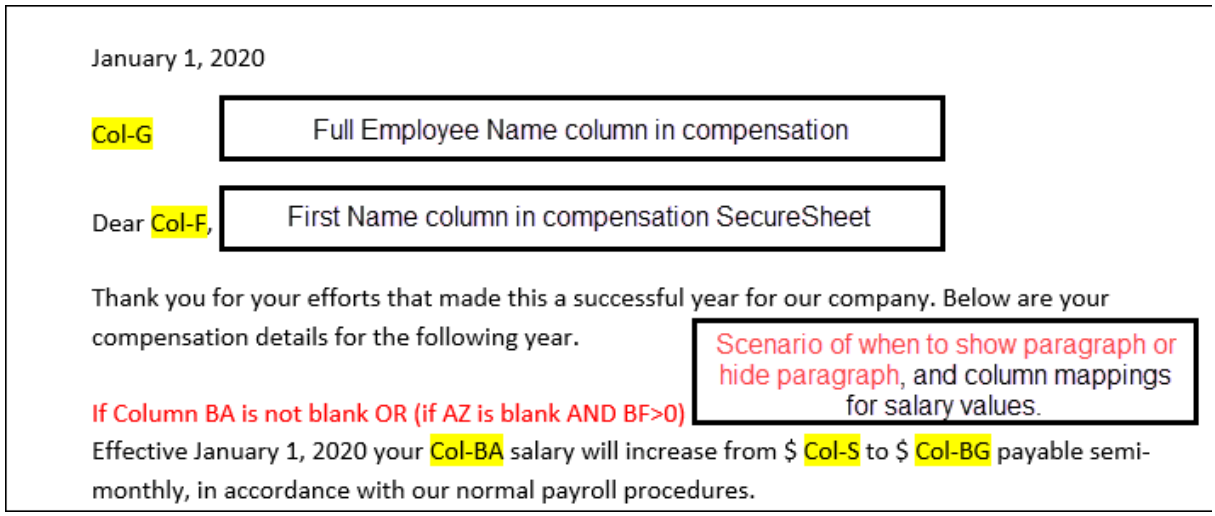
Statement Column Mapping and Scenarios

SecureSheet can transfer your statement template(s) from Excel or Word into tab(s) in your main SecureSheet. The SecureSheet Support Team will assist in setting up your statement(s) in SecureSheet so that they can be generated at the end of your cycle. See the Statement Setup Process for more detail.

Statement Column Mapping and Scenarios

1. In your template(s), either in Excel or Word, everywhere there is a unique value, identify the

corresponding column from your main tab in SecureSheet where that value can be found. Also identify any scenario where a paragraph(s) or a line(s) of the template needs to be hidden (based on logic that can be applied from the values in your main tab, e.g., hide when Department = "Sales"). For example:



2. Upload your template to File Attachments in SecureSheet.
3. Let the SecureSheet Support Team know if there are any employees who will not be receiving a statement, but may still have a row in the SecureSheet. Logic will be added that removes the statement export from those employee rows.
4. If applicable, email the logo or header image file in .png or .jpg format to SecureSheet Support.

The next steps the SecureSheet Support Team will execute are:

- Design statement tab(s) in your main SecureSheet,
  - Create formulas in the statement tab(s) that map to the row values from your main SecureSheet tab to pull the specific row values into the columns you have identified in the mapping
    - For example: =INDIRECT("'Merit'!"&"R"&$N$3)
- Build formulas to apply logic to show or hide paragraphs or values in your statement(s) to support the scenarios defined by you
  - For example: =IF(AND(ISBLANK(INDIRECT("'Merit'!"&"AZ"&$N$3)),INDIRECT("'Merit'!"&"BF"&$N$3)>0),"Show","")
- Set up the All Data (View Only) view to export statements so you can verify statements,
- Add statement export logic to the end user views that will have the ability to export statement(s).

NOTE: Client administrators may perform any/all of the statement setup tasks as desired. The SecureSheet Support Team is available to guide the knowledge transfer of the Statement Setup Process.

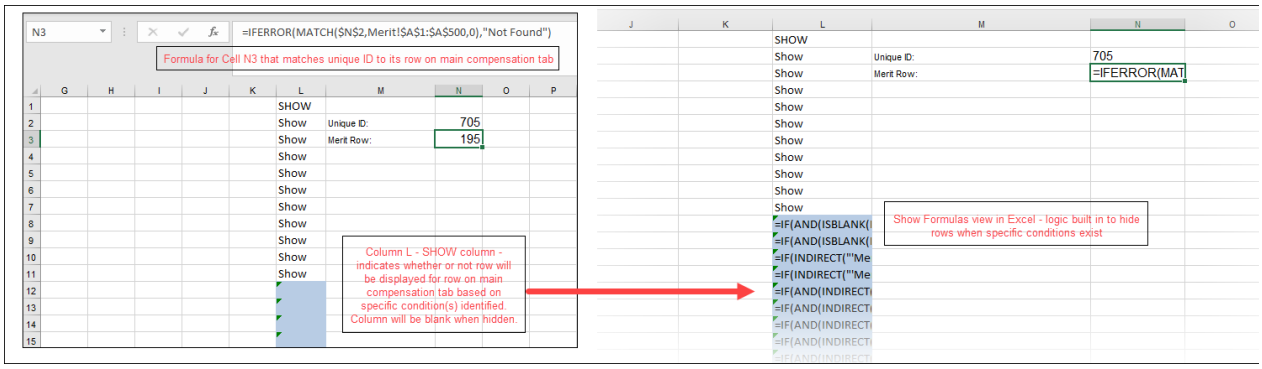
Design a Statement Tab and Modify the Default View

Statement Tab Design

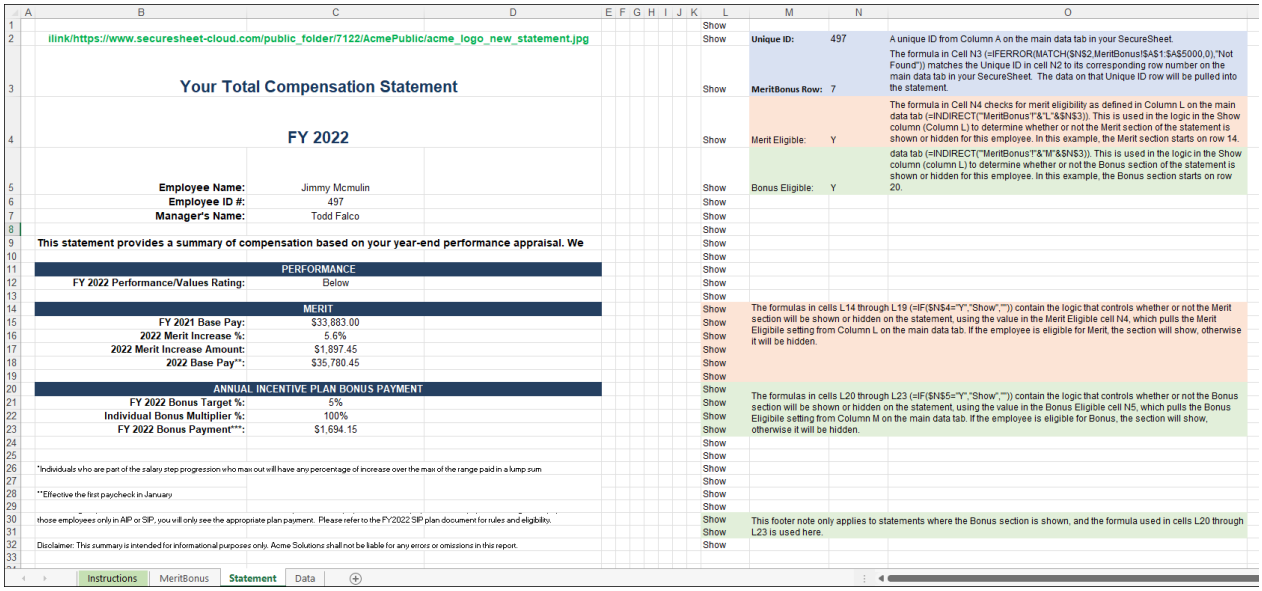
Each statement will have a corresponding tab in SecureSheet. For consistency and ease of maintenance, the following standards are applied to a new statement design:

- **Columns A through F** are the statement content.
    - Additional columns may be used if necessary to accommodate the content design.
- **Column L** is the **Show** column.
    - Whether or not a row is shown or hidden on a statement is controlled by the value in the Show column. If a formula is on a row, it will be highlighted and indicates that there is special scenario logic that will be applied to determine if the row is displayed or hidden. For example:
        - =IF(AND(ISBLANK(INDIRECT("'Merit'!"&"AZ"&$N$3)),INDIRECT("'Merit'!"&"BF"&$N$3)>0),"Show","")
- **Cell N2** is the **Unique ID** which gets cross referenced to the ROW ID on the main SecureSheet tab.
- **Cell N3** is the calculated **ROW ID** on the main SecureSheet tab that tells SecureSheet the specific row to pull values from for the unique statement.
    - The formula syntax for this cell is:
        - =IFERROR(MATCH($N$2,Merit!$A$1:$A$5000,0),"Not Found")
            - Where "Merit" equals the main compensation tab name and Column A is the SecureSheet Unique ID.
- Each unique value in the content of the statement is mapped to a specific column(s) in the main SecureSheet tab using an INDIRECT formula. For example:
    - Concatenate two columns (e.g., firstname lastname) for statement content:
        - =INDIRECT("'Merit Data'!"&"K"&$N$3)&" "&INDIRECT("'Merit Data'!"&"L"&$N$3)
        - Shows as Todd Falco in the statement
    - To ensure cell data is formatted with two decimal places, use the TEXT formula in conjunction with INDIRECT:
        - =TEXT(INDIRECT("'Merit Data'!"&"AP"&$N$3),"$#,##0.00")
        - Shows as $87,000.00 in the statement
    - Column mappings within a paragraph:
        - ="Your earned payout is "&TEXT(INDIRECT("'Merit Data'!"&"O"&$N$3),"$#,##0")&". This amount was derived by multiplying your target opportunity of "&TEXT(INDIRECT("'Merit Data'!"&"P"&$N$3),"$#,##0")&" by the Total Weighted Payout % listed above."

Show Column Example:



Statement Tab Show Column with Show Logic Explained:



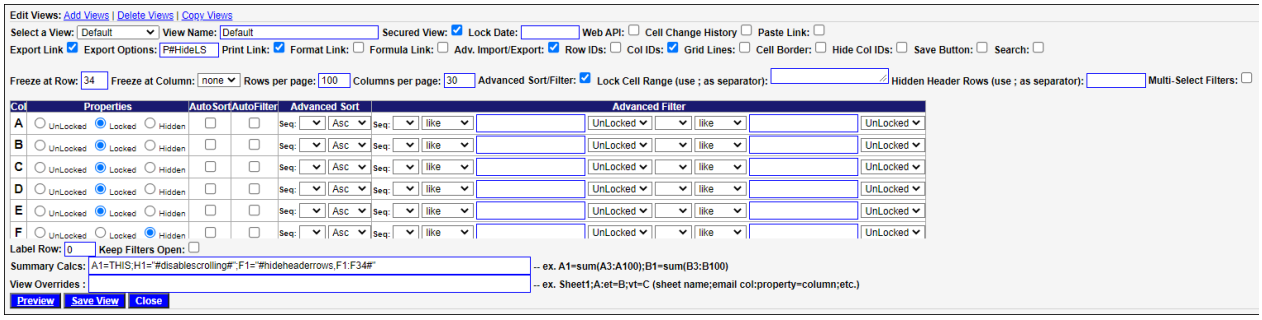
Modify the Default View on the Statement Tab

After a statement tab is created, the Default view on the Statement tab must be modified accordingly to support the INDEX/MATCH and INDIRECT formula logic on the statement tab that pulls in unique values for each exported statement:

1. From the statement tab, select **Views**.
2. Select **Default** from the **Views:** dropdown.
3. Turn on the **Export Link:** checkbox.
4. Enter **P#HideLS** in the **Export Options:** checkbox.
5. Turn off the following checkboxes: Row IDs, Col IDs, Grid Lines, and Cell Border.
6. Enter the last row of content on the statement tab in the **Freeze at Row** field. SecureSheet will then be able to automatically calculate all the mappings and applied logic for all of the rows in the statement.

   NOTE: If you export a blank statement, check that your freeze at row is set to the last row of content on the statement tab.
7. Put an **Advanced Filter** on Column-L: **Seq: 1 = Show**.
8. In **Summary Calcs**, enter: A1=THIS;K1="#disablescrolling#";L1="#hideheaderrows,L1:L39#"
   - Where hideheaderrows includes all of the rows in the statement and is the same as the "Show" column (in Step 8).
9. Set every column with statement content to be displayed to **Locked**.

10. Set every column without statement content to **Hidden**.
11. Click **Save View**.



Continue to setup the statement on main SecureSheet tab:

- Set up the statement logic on the main SecureSheet tab
- Set up a statement form view on the main SecureSheet tab
- See the Statement Setup Process for more detail

Set Up Statement Logic on Main SecureSheet Tab

Statement Logic on the Main SecureSheet Tab

On the main SecureSheet tab, the first five columns are reserved to plug in statement logic that is required to export statements in conjunction with the statement form view on the main SecureSheet tab and the default view on the statement tab.

- **Column A** is the SecureSheet Unique ID (no leading zeros).
    - This value is passed to the statement view through the INDEX/MATCH on the statement tab so that the row values are pulled into the export.
    - Column Title: Unique ID
    - Formula (example): =F10*1
- **Column B** is the Export Statement Link.
    - This is a hyperlink that places an Export Statment link on each row, which allows the export of an individual statement.
    - Column Title: Export Statement / Export Letter
    - Formula (example):
        - =IF(*logic that removes the statement functionality for any employee row that should **not** have an associated statement*,"","=IF(C7<>"","sv_statement//"&C7&"//Export Statement&PDFID="&D7&"&SO=Y","")
        - For example:
            - =IF(K7<>"","sv_statement//"&C7&"//Export Statement&PDFID="&D7&"&SO=Y","")
                - C7 is the view name that is referenced to export the statement content applicable to this row, with the data row identified (e.g., 7).
                - Export Statement is the text that will display for the hyperlink to export an individual statement from column B on each row. This may be customized to your preference.

- D7 is the file name of the individual PDF file that will be exported as identified in Column D on your main SecureSheet tab.

NOTE: This should resolve to "Export Statement" if the employee is receiveing a letter and blank if the employee is not receiving a statement. You will not see "Export Statement" in Excel as this syntax is custom to SecureSheet.

- **Column C** is the form view name in the main SecureSheet tab that will export the statement content. If you have more than one statement, the formula in this column needs to identify which statement form the employee needs to receive.
  - Column Title: Form View Name
  - Formula:
    - =IF(*logic that removes statement functionality for any EE row that should **not** have an associated statement/specifies which statement format applies to this row*,"Statement1","Statement2")

      NOTE: This should resolve to the PDF file name if this employee is receiving a statement and blank if not. If the employee is not receiving a statement, this needs to be blank or a statement will be generated for them.
- **Column D** is the PDF File Name for the exported statement.
  - This can be a concatenation of any columns in the main SecureSheet tab and any text to help easily identify the statements when exported individually or in a batch.
    - Formula (example): =IF(*logic that removes statement functionality for any EE row that should **not** have an associated statement*,"",K29&"_"&M29&"_"&"2021 Compensation Statement")

      NOTE: This should resolve to the PDF file name if this employee is receiving a statement and blank if not.

      NOTE: PDF file names need to be unique. If an employee is receiving more than one statement, the statement name must be unique for each statement.

Additional Notes about Statement Exporting:

NOTE: Formulas in columns B, C and D should resolve to blank for employees that will not be receiving a statement, based on a condition(s) in the data. These formulas need to remove the statement logic on a row so that they will not export in a batch nor individually when an employee is not receiving a statement.

NOTE: If every employee is receiving a statement, then the IF logic is not required. The “resolve to blanks” is needed when everyone is not receiving a statement and you do not want letters exported with zero values as it may confuse managers. Some clients choose to export anyway to use the letter as a reminder tool that a conversation needs to occur with each employee.

Continue to setup the statement on the main SecureSheet tab:

- Set up a statement form view on the main SecureSheet tab
- See the Statement Setup Process for more detail

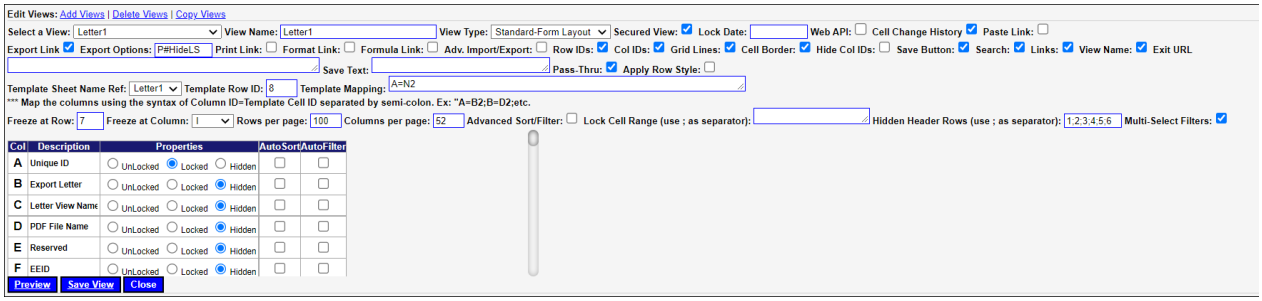
Set Up a Statement Form View on Main SecureSheet Tab

Statement Form View on the Main SecureSheet Tab

This is referred to as a pass-thru view that maps the Unique ID in Column A to the statement tab. The logic on the statement tab then matches the values in the unique row as statements are exported individually or in a batch.

1. From the main SecureSheet tab, select **Views**.
2. Click **Add Views**.
3. Select **Standard-Form Layout** from the **View Type:** dropdown.
4. Turn on the **Export Link:** checkbox.
5. Enter **P#HideLS** in the **Export Options:** checkbox.
6. Turn on the **Pass-Thru:** checkbox.
7. Select the **Template Sheet Name Ref:** that matches the tab name in SecureSheet with the statement layout/content.
8. Enter the **Template Row ID** as the first row **after** the header row.
9. Enter **A=N2** in the **Template Mapping:** field.
10. Set the header row on your main compensation tab to the **Freeze at Row** field.
11. If there are any header rows on your main compensation tab, hide them on this view by entering them in the **Hidden Header Rows:** field, delimited by a semi-colon.
12. Set Column A to **Locked**.
13. Set every other column to **Hidden**.
14. Click **Save**.

> **Note:** A view can only support one statement tab. If you have multiple statements, you will have a 1:1 relationship between a statement tab and a statement form view on the main SecureSheet tab.



If you have not done so already, continue to setup the statement on main SecureSheet tab:

- Set up the statement logic on the main SecureSheet tab
- See the Statement Setup Process for more detail

Set Up Views for End Users to Export Statements

Anyone in the organization can be given access to a view in SecureSheet that allows them to export statements. Managers at any level and HRBPs may have the ability to export statements for their respective teams.

When export functionality is added to a view, it allows individual statement export as well as batch statement export; the batch exports all visible rows in a view. A view may be filtered to a specific set of team members prior to exporting a batch of statements.

If you need to specifically audit the statement communication process, in the SecureSheet audit trail, you can see which managers exported statements from SecureSheet.

If you have more than one statement for your employees (e.g., more than one language), you will need more than one batch export view for your end users. Only one statement format can be exported in a batch from a view. For example, you might have an Export Statements - English view that exports the statement in English and an Export Statements - French view that exports the statement in French. You cannot have one view that exports both versions. The SecureSheet Support team can assist with this view set up as needed.

Videos:

- Export Statements
- Set Up Existing Views to Export Statements
- Create Views to Export Statements

Set Up Views for End Users to Export Statements

Determine who in the organization needs to export statements, for example, HRBPs and Level 1 Managers. For each user group that needs to export, there are two approaches to choose from to set up statement exporting.

> **NOTE:** You may add statement export functionality to an All Data view so you can test exporting statements (individually and in batch) as an administrator, prior to opening up the capability to your users.

There are two main ways to approach views that your users can use to export statements:

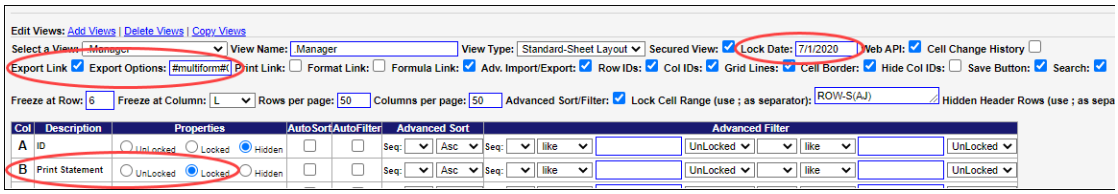
- **Use Existing Views** - The most straightforward approach to set up statement export functionality is to use existing views.
    1. Click **Views**.
    2. Select the view that you want to have statement export functionality.
    3. Put a Lock Date on the view(s) from which users will export. This allows all the columns in the view to be visible and prohibits any updates from being made in any columns set to UnLocked (i.e., it supercedes the UnLocked setting).
    4. Turn on the **Export Link** checkbox.
    5. Enter **#multiform#C;D;Click Here to Export Statements to PDF Format#HideLS** in the **Export Options:** field, where:
        - **C** is the view name to export
        - **D** is the PDF file name to export

       This allows statements to be exported in batch from this view.

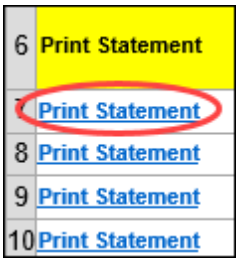
       NOTE: If you had this specific end user view set up with the ability to export to Excel, and

you still want users to be able to export the view to Excel, keep the "E" in front of the Export Options syntax, for example: **E#multiform#C;D;Click Here to Export Statements to PDF Format#HideLS**. This will give the users the option to export to Excel or to export their statements to a batch file when they click Export View.

6. Set **Column B** to **Locked**, which is the column with the Export Statement link.



End users will see the print statement (or export statement) hyperlink in their respective view:



- **Create Export Statement Views** - If you want to minimize visible columns in the view that is used to export statements, you may consider this approach.
    1. Add new or copy existing views and modify for export statements view(s). If adding new views, make sure the appropriate security filters are set in each view (refer to the filter(s) in the data collection view that was created for each user group for which you may be adding a new export statement view).
    2. Turn on the **Export Link** checkbox.
    3. Enter **#multiform#C;D;Click Here to Export Statements to PDF Format#HideLS** in the **Export Options:** field.
    4. Make basic information columns visible in the view.
    5. Set **Column B** to **Locked**, which is the link to export the statement individually.
    6. Share the new view with the appropriate user group(s).

Test Statement Scenarios Offline

Testing Statement Scenarios Offline

If you have identified special conditions where rows may be hidden on a statement, you can test the statement offline in Excel to validate the show/hide logic.

1. Export the SecureSheet. Include all tabs in your export so the statement tab can pull values from the main SecureSheet tab.
2. Unhide hidden columns on the statement tab.
3. Change the Unique ID in cell N2 for an employee who meets a specific scenario that you want to test.
4. Verify the values in column L on the statement tab.
    - If a row should be hidden for that employee, column L will not display "Show".
    - In Excel, if you want to see the formula controlling the Show logic, select **Formulas** from

the menu bar and click **Show Formulas**.

NOTE: An administrator statement testing view may also be set up in SecureSheet so that you may experience a similar process that your end users will follow when exporting statements.

IT Team Instructions

When your end users access SecureSheet, they may login through the SecureSheet login page or your organization may choose to setup Single Sign On (SSO).

Follow the steps to Setup Single Sign On. After you return your metadata file, SecureSheet Support will send you an SSO SecureSheet test site so that you may test that your users may successfully access SecureSheet through your internal SSO setup.

Also Whitelist SecureSheet so email communication from SecureSheet to your end users is not blocked. Users may be set up to receive individual emails based on how your organization implements its process in SecureSheet, or if your organization does not implement SSO, SecureSheet will send password reset emails to your end users.

Set Up Single Sign On

SecureSheet allows organizations to sign into the application through Single Sign On.
Follow these set-up instructions.

SecureSheet only supports an **IDP Initiated** SAML login request for bypassing our login page.

1. As a **Service Provider (SP)**, here is SecureSheet's SSO information:
    a. SecureSheet Service Provider entityID = "https://www.securesheet-cloud.com/sso"
    b. Assertion Consumer Service (ACS) URL = "https://www.securesheet-cloud.com/sso/SAML/login.aspx"
2. Here is what SecureSheet needs from you as an **Identity Provider (IP)**:
    a. Your Identity Provider entityID.
    b. SecureSheet requests that the Email Address of the user be passed as name identifier (the Subject's "NameID" element). The SecureSheet system shares SecureSheets with end users by email address so it needs this parameter for automatic sign on, which will in turn establish the appropriate security access within SecureSheet for the authenticated user.
    c. Your Authentication Certificate (or SecureSheet can pull it from your "X509Certificate" tag).
3. Click here for the SecureSheet metadata file.
4. When you have completed your setup, send an export of your Federation Metadata XML file to SecureSheet Support.

Once set up is complete on the SecureSheet side, you can test SSO login through your Identity Provider (IP) initiated link. You will see a user login test somewhere in your SSO administrative tools.

SecureSheet support staff never see this link nor have access to it. This is the link you will need to share with your end users so they can access SecureSheet through your SSO set up.

- For an example of an OKTA set up, click here.
- For an example of an AZURE set up, click here.
- For an example of an ADFS set up, click here.

NOTE: If you would like to include a SecureSheet logo on an internal portal page, click here for a square SecureSheet logo file .
NOTE: If your Authentication Certificate expires, send your updated metadata file to SecureSheet Support and we will update your certification information in our SSO setup for your organization. The transition should be seamless to end users and it can be coordinated in detail as needed with SecureSheet Support.

SSO OKTA Example

OKTA SSO Set Up Example:

← Back to Applications

SecureSheet PenTest (GreyCastle)

Active ▾ View Logs Monitor Imports

General | Sign On | Mobile | Import | Assignments

App Settings

Edit

Application label	SecureSheet PenTest (GreyCastle)
Application visibility	☐ Do not display application icon to users ☐ Do not display application icon in the Okta Mobile app
Provisioning	◉ None ○ On-Premises Provisioning ○ SCIM
Auto-launch	☐ Auto-launch the app when user signs into Okta.
Application notes for end users	
Application notes for admins	

SAML Settings

Edit

GENERAL

Single Sign On URL	https://www.securesheet-cloud.com/sso/SAML/login.aspx
Recipient URL	https://www.securesheet-cloud.com/sso/SAML/login.aspx
Destination URL	https://www.securesheet-cloud.com/sso/SAML/login.aspx
Audience Restriction	https://www.securesheet-cloud.com/sso
Default Relay State	
Name ID Format	Unspecified
Response	Signed
Assertion Signature	Signed
Signature Algorithm	RSA_SHA256
Digest Algorithm	SHA256
Assertion Encryption	Unencrypted
SAML Single Logout	Disabled
authnContextClassRef	PasswordProtectedTransport
Honor Force Authentication	Yes
Assertion Inline Hook	None (disabled)
SAML Issuer ID	http://www.okta.com/${org.externalKey}

General Settings

All fields are required unless marked optional. Some fields may no longer be editable.

On-Premises Provisioning

On-premises provisioning allows you to provision users to your on-premises applications.

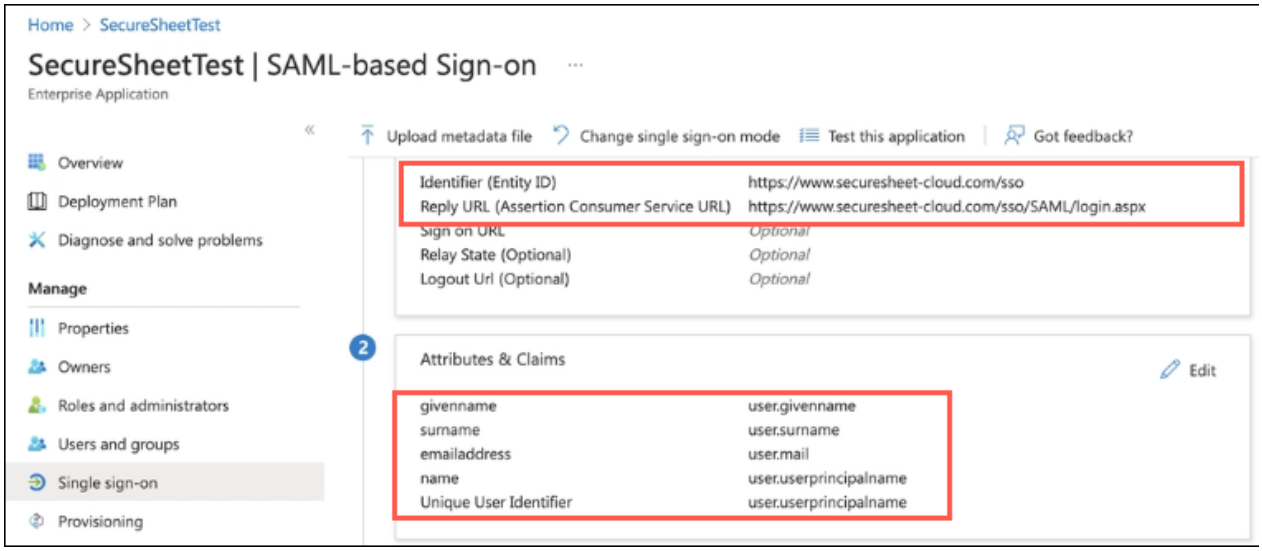
SSO AZURE Example

AZURE SSO Set Up Example:

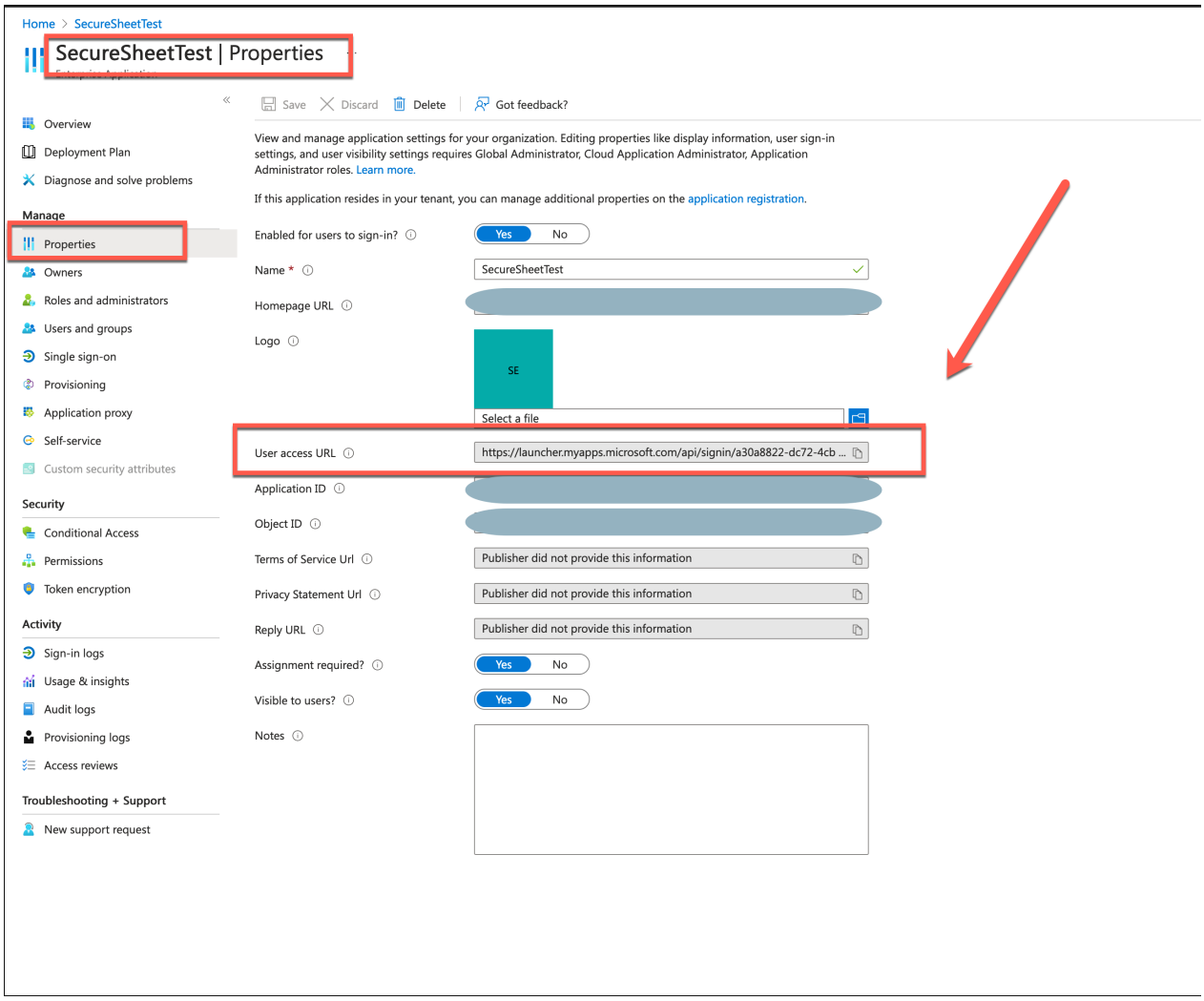
Video: SecureSheet Azure Set Up

SecureSheet is not a pre-configured applicatoin in AZURE. Add SecureSheet manually as a new application.

This is the basic configuration of our Entity ID, login URL and where email address is identified as NameID:



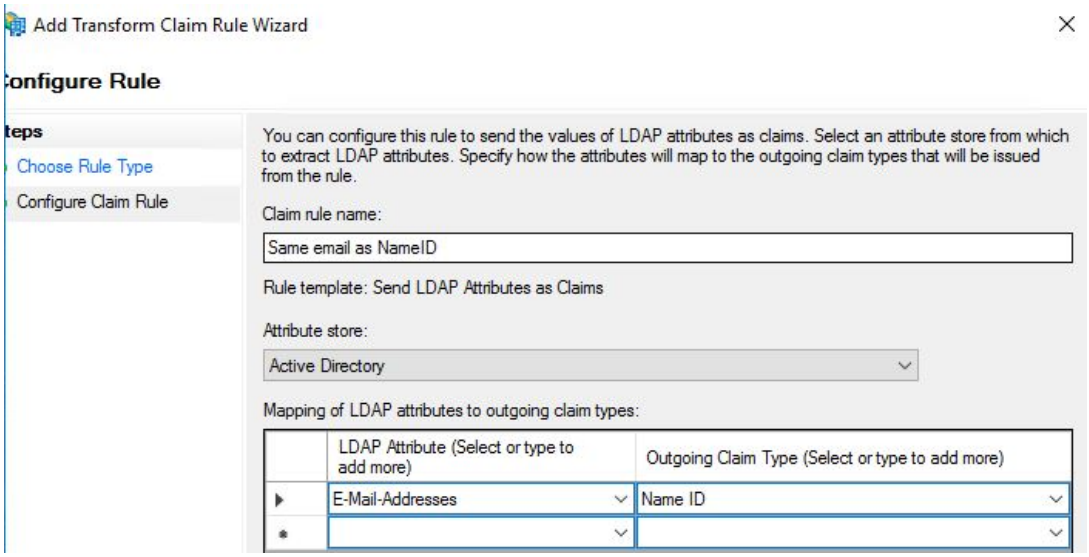
This is generated by AZURE as the link that can be sent to end users to initiate the SSO process to access SecureSheet:



SSO ADFS Example

ADFS SSO Set Up Example:

Here's a general screen shot of an example using "Name ID":



Whitelist SecureSheet

When SecureSheet sends individual emails:

www.securesheet.com, mail.securesheet.com

174.143.76.13

When SecureSheet sends support communication emails (such as password resets) using SendGrid as the 3rd party provider but using our "A" records:

01.email.securesheet.com

198.37.151.73

Example Spreadsheets

There are several example spreadsheets that you may open in Excel to work with as you model your own spreadsheet.

- To access an example compensation model with SecureSheet Set Up Considerations in Excel examples included, click here.
- To access an example Users-Views file, click here.

There are several example spreadsheets in the following topics that you may open in Excel as an example while you are modeling your own spreadsheet:

- Setup a Dependent Dropdown for SecureSheet
- Setup a Data Validation to allow a Dollar Amount or a Percentage
- Setup a Data Validation to Require a Comment
- Setup Conditional Cell Locking to Lock Columns on Rows
- Multi-Level Approval Locking
- Multi-Level Approval Locking - Skipping Levels
- MROUND in Excel vs SecureSheet
- Blank Cells in Excel vs SecureSheet

Setup a Dependent Dropdown for SecureSheet

SecureSheet uses a very specific technique (there are many) for dependent dropdowns to work in both SecureSheet and in Excel. In this technique, it is required that groupings for dependent selection must be grouped across contiguous rows for the Excel lookup to work correctly.

For instructions and an example spreadsheet with a dependent drop down built following these steps, click here.

1. Create a supporting tab to setup dropdown values for dependent data validation(s) (e.g., Data).
2. Create a named range for your first dropdown. In this example, the named range is

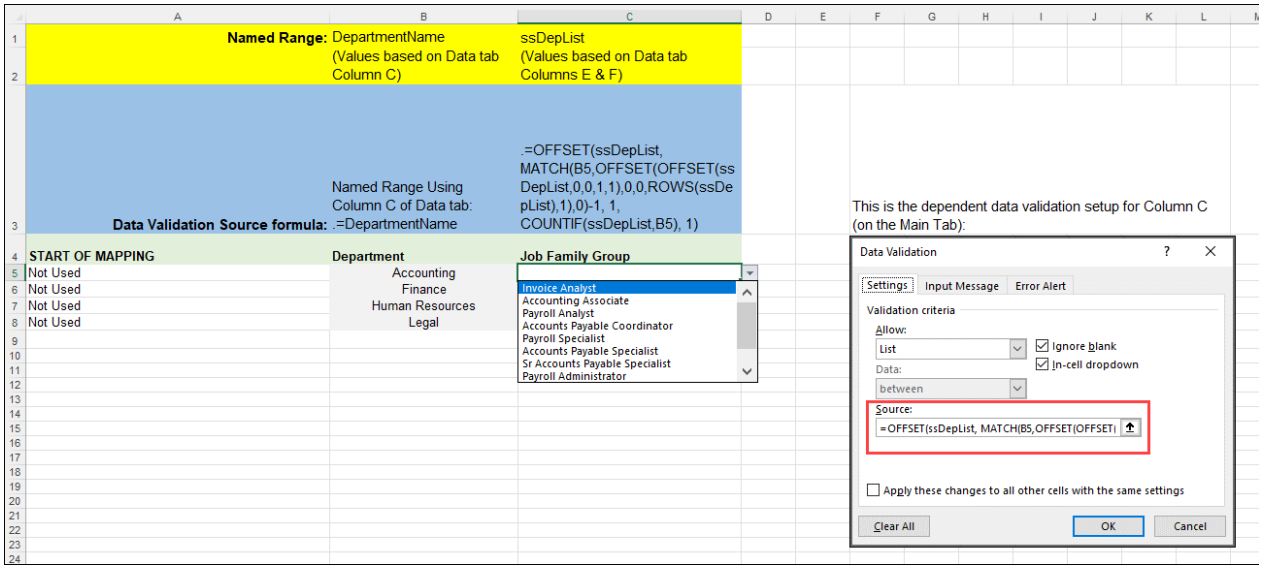
DepartmentName (on the Data tab, Cells C7:C14).

3. Create a named range for the second dropdown, which is dependent on the value selected from the first dropdown. For example, after selecting a department (from the first dropdown), these would be the job titles (second dropdown) available for it.
4. On the main tab, create a data validation for Department that links to the DepartmentName named range on your Data tab.
5. For the dropdown that is dependent on the Department selected, create a data validation that refers to the ssDepList named range on your Data tab. This data validation needs to have this formula (refer to the considerations section when you have more than one dependent dropdown - the dependent data validations formulas must match the naming convention):
.=OFFSET(ssDepList, MATCH(B5,OFFSET(OFFSET(ssDepList,0,0,1,1),0,0,ROWS(ssDepList),1),0)-1, 1, COUNTIF(ssDepList,B5), 1)

Considerations

- The Named Range(s) for dependent dropdowns must follow the naming convention ssDepList, ssDepList1, ssDepList2 .... through ssDepList20. SecureSheet looks for this specific naming convention to treat these as dependent dropdowns.
- The dependent dropdown data validation formula must match the naming convention. When you have more than one dependent dropdown, adjust the OFFSET ssDepList Named Range number and MATCH cells with the correct references. For example:
.=OFFSET(ssDepList1, MATCH(B5,OFFSET(OFFSET(ssDepList1,0,0,1,1),0,0,ROWS(ssDepList1),1),0)-1, 1, COUNTIF(ssDepList1,C5), 1)
- For the OFFSET to work properly, the lists on the data tab will need to remain grouped by the first column. In this example, the Accounting jobs must be in contiguous rows, Business Development jobs in contiguous rows, etc.

Example of a main tab:



Example of a supporting tab (data):

	A	B	C	D	E	F
4	**Named Range Used**		**Department**		**ssDepList**	
5						
6			Department		Job Family Group	Job Family
7			Accounting		Accounting	Invoice Analyst
8			Business Development		Accounting	Accounting Associate
9			Credit		Accounting	Payroll Analyst
10			Finance		Accounting	Accounts Payable Coordinator
11			Human Resources		Accounting	Payroll Specialist
12			Information Technology		Accounting	Accounts Payable Specialist
13			Legal		Accounting	Sr Accounts Payable Specialist
14			Sales		Accounting	Payroll Administrator
15					Accounting	Supervisor, Accounts Payable
16					Accounting	Accountant
17					Business Development	Reporting Specialist
18					Business Development	Business Analyst
19					Business Development	Manager, Business Development
20					Business Development	Sr Manager, Business Development
21					Business Development	Sr Manager, Mktg Analytics
22					Credit	Cash Applications Representative
23					Credit	Credit Operations Assistant
24					Credit	New Accounts Representative
25					Credit	Cash Applications Lead
26					Credit	Credit Analyst
27					Credit	Supervisor, Credit
28					Credit	Manager, Credit
29					Credit	Sr Manager, Credit
30					Finance	Sr Financial Analyst
31					Finance	Financial Analyst
32					Finance	Sr Manager, Finance

Setup a Data Validation to Allow a Dollar Amount or Percentage Entry

If you require users to enter either a dollar amount or a percentage in a recommendation column, but not both, you need to present an error to the user if they try to enter both. You do this by setting up data validation helper columns and data validations that do the following:

- Add helper columns to your structure that contain formulas that check to see if a value is entered in the dollar amount column and the percentage column.
- Check for the results of the helper columns in a data validation in both the dollar amount column and the percentage column and present an error alert to the user if they have entered a value in both columns.

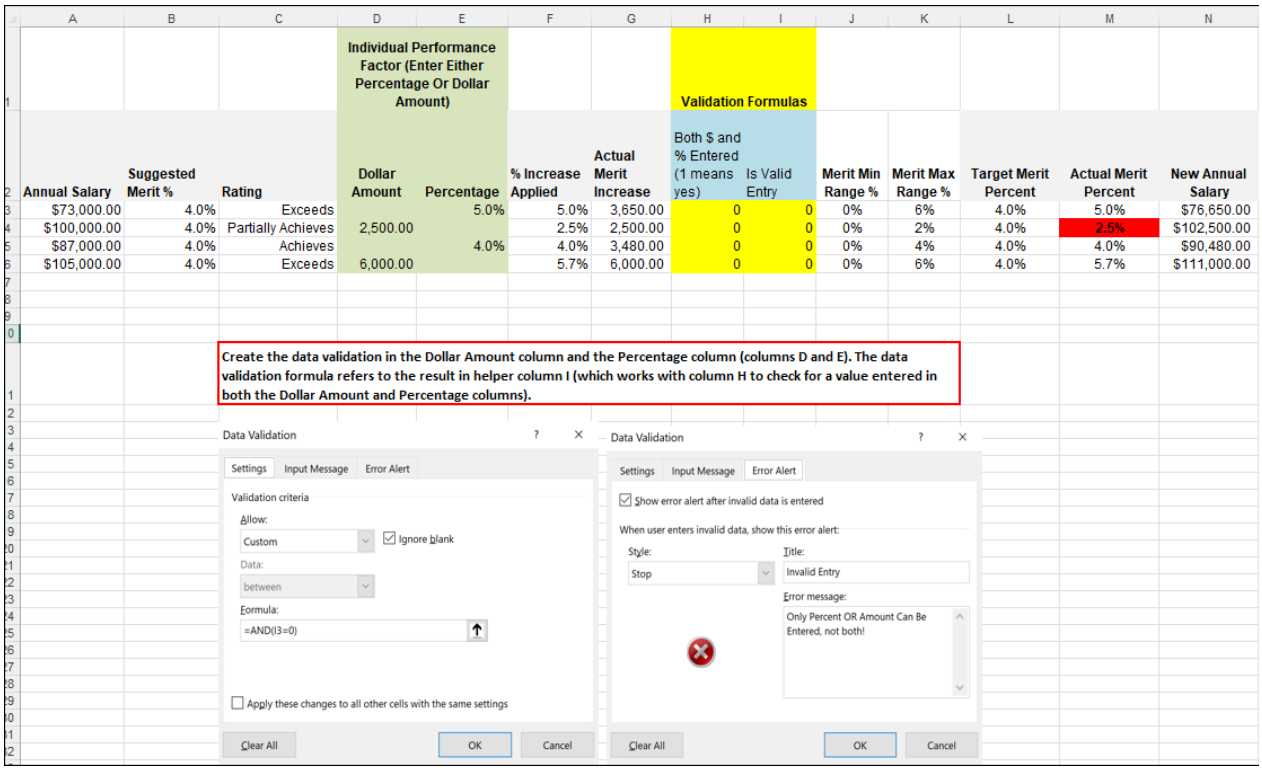
For instructions and an example spreadsheet with a data validations setup to allow users to enter a dollar amount or a percentage (not both) following these steps, click here.

1. Create a Dollar Amount column and a Percentage column on the main tab in your excel structure where users enter a value in either column. In this example, Columns D and E on the Main Tab.
2. Create a column for a formula that checks for a value in both the Dollar Amount and Percentage columns. This formula checks for values in both the Dollar Amount column and the Percentage column, and returns a 1 if both columns contain a value. In this example, this formula is in Column H on the Main Tab: =IF(AND(D3<>"",E3<>"")=TRUE,1,0)
3. Create a column for a second formula that checks for an error in the first formula. If there is an error, the formula returns a 1 and if no error, it returns the result of the first formula. In this example, this formula is in Column I on the Main Tab: =IF(ISERROR(H3),1,H3)
    - Column I results in '1' only if the formula in column H results in '1' (i.e., the formula in column H results in an error).
4. Create a Data Validation (including an Error Alert message) in the Dollar Amount column and the Percentage column that references Column I. In this example, the data validation is in Columns D and E on the Main Tab and the data validation formula is: =AND(I3=0)

- This data validation formula checks the result of the formulas in the helper columns (in this example, Columns H and I) and if a user has entered a value in both, an Error Alert message will pop up and stop a user from saving this change.

Considerations

- Changes must be saved in SecureSheet before the validations will be applied, i.e., the user will not see the Error Alert message if they have entered a value in both the Dollar Amount and Percentage columns until they click Save Changes in SecureSheet.



Setup a Data Validation to Require a Comment

If you require users to enter a comment if entering a percentage/number that goes above the max, you need to present an error to the user. You may use a helper column that has a data validation to do the following:

- Add a column to your structure that contains a formula that checks if one value is greater than another value and if the comment field is left blank.
- Check the results of the helper column in a data validation and present an error alert to the user if they have entered a value greater than the max and the comment field is still left blank.

For instructions and an example spreadsheet with the data validations setup to require a comment when a percentage is entered outside of range, click here.

1. Create an input column on the main tab in your excel structure where users enter a value. In this example, Individual Performance Multiplier % (column D).
2. Create a column for a formula that checks if the comment field is blank when the input value is above the max. If true, the formula returns a 1 and if false, it returns 0.In this example, this formula is in Column G on the MeritBonus tab: =IF(AND(D3>1,(ISBLANK(F3))),1,0)

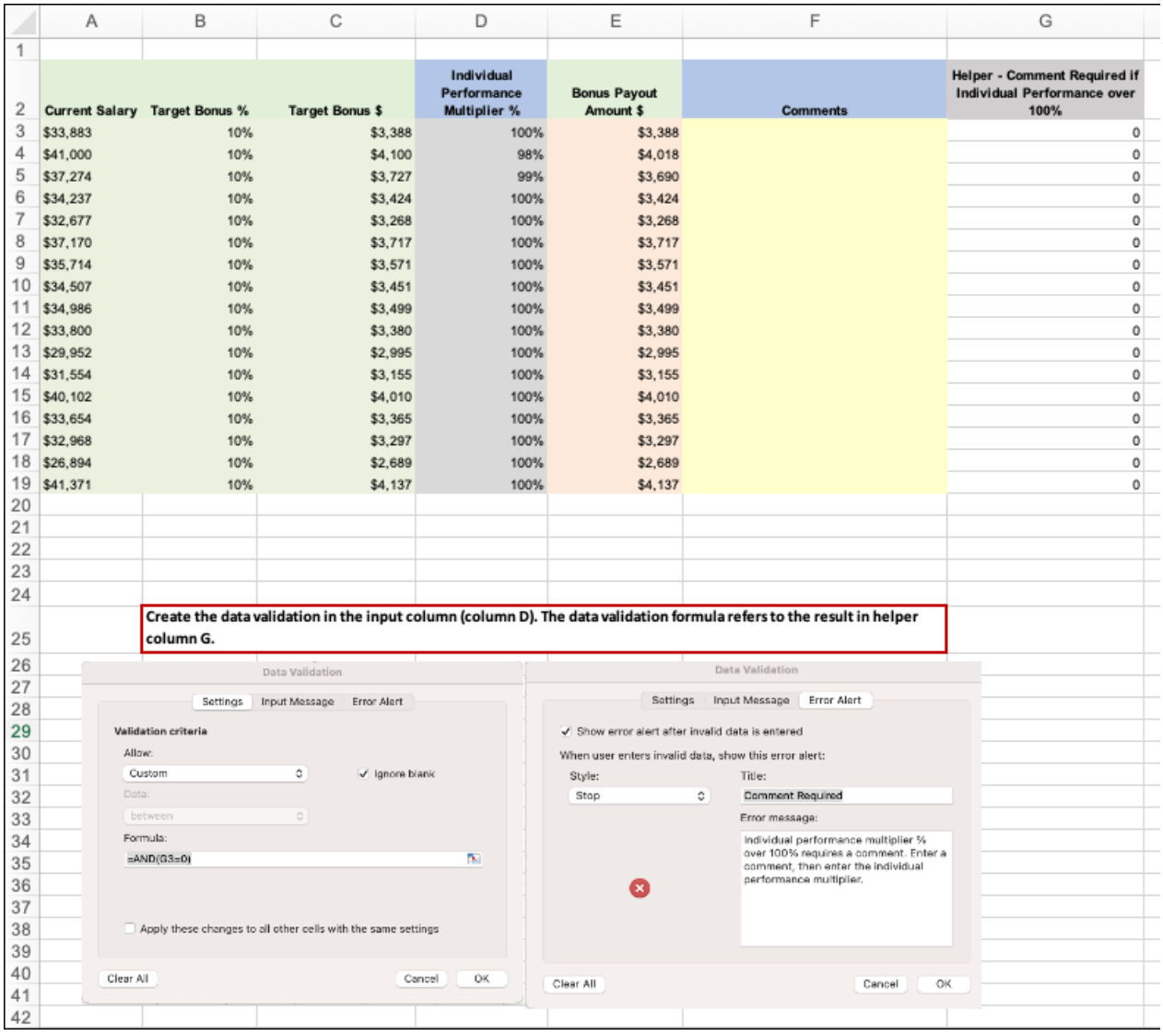
3. Create a Data Validation (including an Error Alert message) in the input column (column D in this example) that references Column G. In this example, the data validation formula is: =AND(G3=0)

- This data validation formula checks the result of the formula in the helper column (in this example, Column G) and if a user has entered a value above max and has not entered a comment, an Error Alert message will pop up and stop a user from saving this change.
- For the user to save a value above max, they must enter a comment and then save their changes.

Considerations:

- Changes must be saved in SecureSheet before the validations will be applied, i.e., the user will not see the Error Alert message if they have entered a value above max and without a comment until they click **Save Changes** in SecureSheet.
- After saving a value above max with a comment, a user could clear the comment, save and would not receive the stop alert.

  NOTE: Conditional formatting the comments column as red if no comment is entered when a value is above max could be set up as a visual reminder.



	A	B	C	D	E	F	G
1							
2	Current Salary	Target Bonus %	Target Bonus $	Individual Performance Multiplier %	Bonus Payout Amount $	Comments	Helper - Comment Required if Individual Performance over 100%
3	$33,883	10%	$3,388	100%	$3,388		0
4	$41,000	10%	$4,100	98%	$4,018		0
5	$37,274	10%	$3,727	99%	$3,690		0
6	$34,237	10%	$3,424	100%	$3,424		0
7	$32,677	10%	$3,268	100%	$3,268		0
8	$37,170	10%	$3,717	100%	$3,717		0
9	$35,714	10%	$3,571	100%	$3,571		0
10	$34,507	10%	$3,451	100%	$3,451		0
11	$34,986	10%	$3,499	100%	$3,499		0
12	$33,800	10%	$3,380	100%	$3,380		0
13	$29,952	10%	$2,995	100%	$2,995		0
14	$31,554	10%	$3,155	100%	$3,155		0
15	$40,102	10%	$4,010	100%	$4,010		0
16	$33,654	10%	$3,365	100%	$3,365		0
17	$32,968	10%	$3,297	100%	$3,297		0
18	$26,894	10%	$2,689	100%	$2,689		0
19	$41,371	10%	$4,137	100%	$4,137		0
20							
21							
22							
23							
24							
25		Create the data validation in the input column (column D). The data validation formula refers to the result in helper column G.					
26							
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36							
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38							
39							
40							
41							
42							

Setup Conditional Cell Locking to Lock Columns on Rows

When you have multiple compensation planning programs in one planning model (e.g., bonus, merit, promotion, equity), not all employees will be eligible for all compensation programs. You may setup conditional row locking in SecureSheet to lock the input columns for employees where they are not eligible for a compensation program. You do this by:

1. **Setting up a Locked Cells** column in your main SecureSheet tab and adding a formula that checks for conditions and identifies columns to lock on each row, accordingly.
2. **Identifying the Locked Cells column in the properties of each end user view** where the locking applies.

For instructions and an example spreadsheet with conditional cell locking setup on the main SecureSheet tab, click here.

1. Setting up the Locked Cells Column

Use one of the spare columns to the right of your last column of data that will contain the logic to conditionally lock cells in SecureSheet.

a) Label a spare column "Locked Cells" in the header row.
b) Use the following formula structure to write the conditional logic that identifies which column(s) to lock. For example, if an employee is not eligible for a merit award, lock the merit input column.

   Formula: =IF($L7="N","R"&ROW(),"")
   Where: =IF(value_logic_check_or_checks,"ColumnLetterToLock"&Row()
   _puts_excel_row_number_reference_into_formula,"else resolves to blank")

   When you have multiple locking conditions, use a semi-colon to delineate the end of one condition and the start of another condition.
   Formula: =IF($L7="N","R"&ROW(),"")&";"&IF($M7="N","W"&ROW(),"")

   When you have a range of columns to lock, follow a similar syntax the identify the range (in this example, columns H through K will lock when the locking condition is met):
   For example: =IF(OR($M12="N/A",$M12="Below D",$M12="Not Eligible"),"H"&ROW()
   &":"&"K"&ROW(),"")

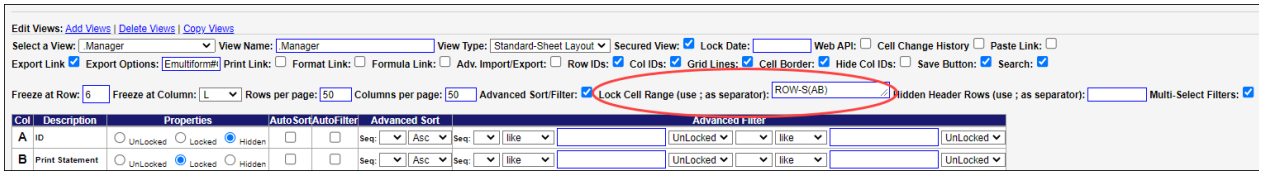
2. Identifying the Locked Cells Column in View Properties

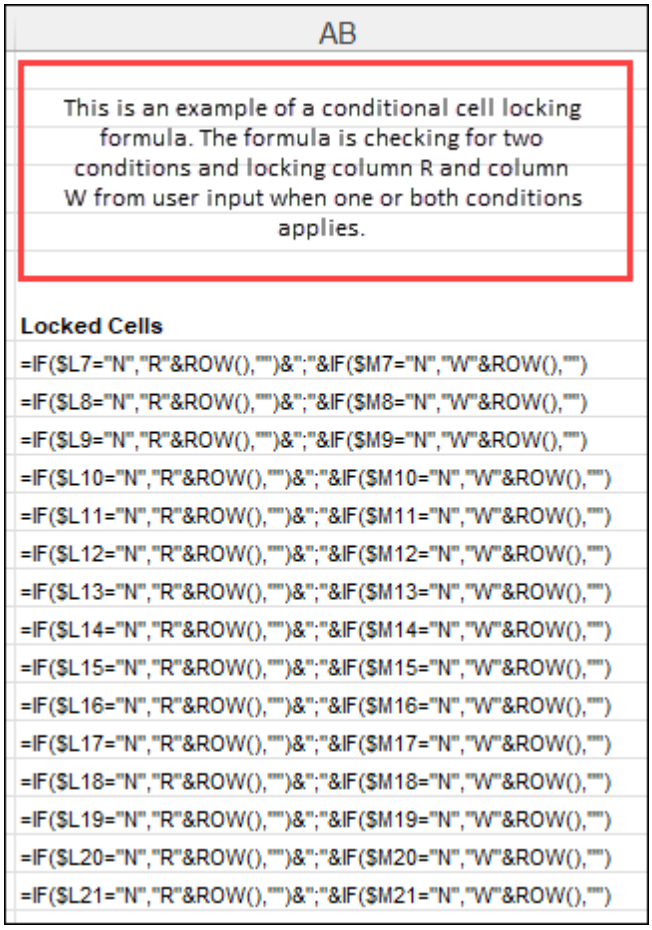
On each end user view where conditional cell locking applies, identify the Locked Cells Column in the view properties and cells will lock accordingly in SecureSheet.

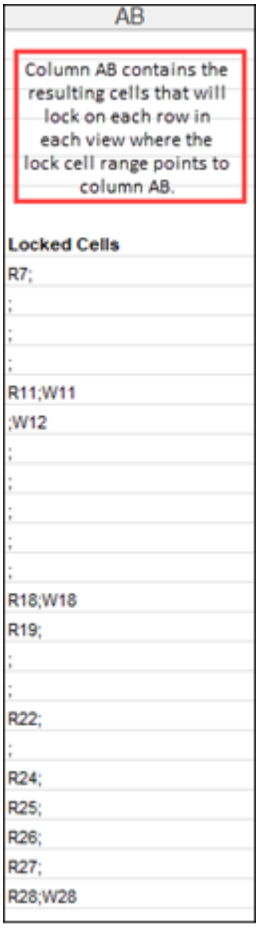
a) Enter the following syntax in the Lock Cell Range (use ; as separator) view property:
   ROW-S(AB)
   Where: (AB) equals the Locked Cells column letter on your main SecureSheet tab
b) Repeat step 3a on each end user view where cells need to lock conditionally.

Considerations:

You may have different cell locking scenarios for different groups of users. When that is the case, add as many different Locked Cells columns as needed to accommodate each view. The ROW-S(LockedCellsColumn) may be different on each user view, if needed.







Multi-Level Approval Locking

Based on how you run your process through your organization, approval locking can be used to control user access based on approval status if desired.

For an example spreadsheet with approval locking setup,click here.

Scenarios may include:

- Each level submits/approves their recommendations before opening to the next level
- All levels remain open until the level above submits/approves their recommendations

SCENARIO: Each Level Submits/Approves Before Opening to the Next Level
In this scenario, each level of planners/management must submit/approve before it opens to the next. Here's an example with Direct Manager, Level 2 Approver and Level 3 Approver:

- The submit/approval process needs be completed in this order: Direct Manager, Level 2 Approver and Level 3 Approver:
    - Direct Manager submits
    - The data entry fields lock to the Direct Manager and open to Level 2 Approver

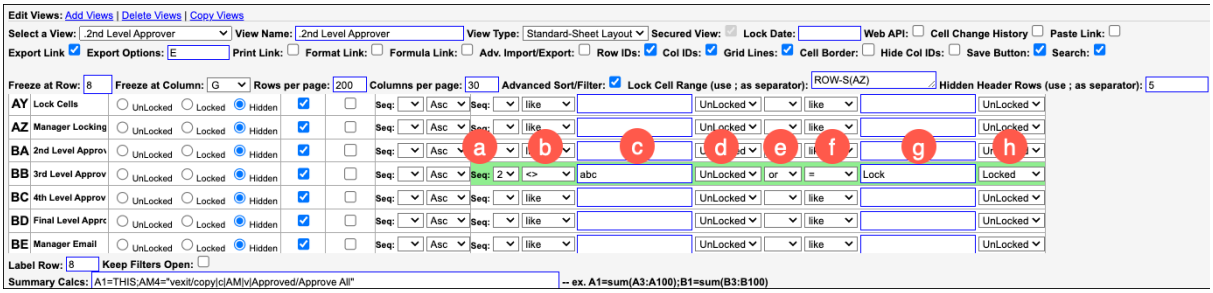
- Level 2 Approver approves
- The data entry fields lock to the Level 2 Approver and open to Level 3 Approver
- Level 3 Approver approves
- The data entry fields lock to the Level 3 Approver

SCENARIO: All Levels Open Until the Level Above Submits/Approves:
In this scenario, all levels of planners/management can enter data until the level above submits/approves. Here's an example with Direct Manager, Level 2 Approver and Level 3 Approver:

- The SecureSheet is active and all users have access to enter data
  - Level 2 Approver approves
  - The data entry fields lock to the Direct Manager
  - Level 3 Approver approves
  - The data entry fields lock to the Direct Manager and Level 2 Approver

Setting up the submit/approval locking:

1. The Excel model will need designated submit/approval columns for each level and separate locking columns.
   - The locking columns will use IF statements based on the status listed in the submit/approval columns.
2. In View design in SecureSheet, modify the advanced filter on the approval locking columns you've created:
   a. Assign a Seq: to the advanced filter (the number will vary on how many seq you already have set up)
   b. Select the condition not equal to (<>) to be used for the comparison
   c. List abc as the comparison text
   d. Set to unlocked
   e. Use or as the connector
   f. Select the 2nd condition as In
   g. List the 2nd comparison text as LOCK or whichever word you choose to use within your Excel IF statement for when the row should lock
   h. Set to Locked



Multi-Level Approval Locking - Skipping Levels

Based on how you run your process through your organization, approval locking can be used to control user access based on approval status if desired. If your process requires each approval level to submit/approve before opening to the next level, approval locking can be used to control user access based on the approval status.

Follow these instructions when there are gaps within the approval chain. For example, if there are 5 levels of leadership, 1 being the top of chain, and a direct manager of an employee is also a level 2 leader and there are no levels between the employee and their level 2 leader, that is referred to as a gap in the approval chain, or skipping levels in the approval process.

When there is a complete hierarchy without any gaps, follow the Multi-Level Approval Locking instructions.

For an example spreadsheet with approvals that skip levels, click here.

Reach out to the SecureSheet Support team if you need assistance with this setup.

SCENARIO: Each Level Submits/Approves Before Opening to the Next Level and the approval locking needs to skip over any missing levels and apply approval logic at the next available level
In this scenario, each level of planners/managers/leaders must submit/approve before the planning data input opens to the next level, but some approval levels may not exist on some employee rows.

Example requirement: The submit/approval process needs be completed in this order: Direct Manager, Level 2 Approver, Level 3 Approver, Level 4 Approver and Final Approver:

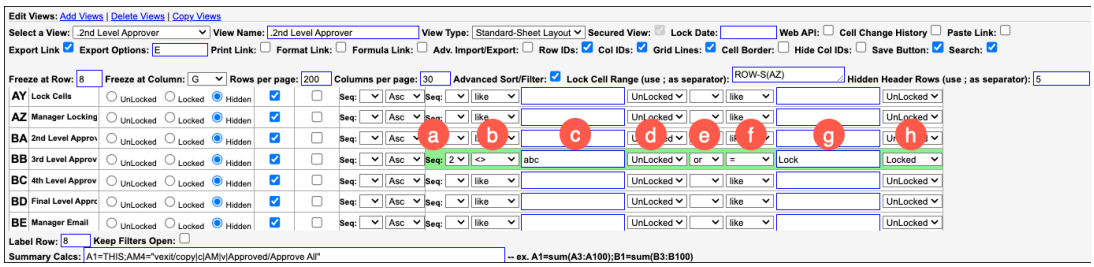
- Direct Manager submits
  - The data entry fields lock to the Direct Manager and open to Level 2 Approver
- Level 2 Approver approves
  - The data entry fields lock to the Level 2 Approver and open to Level 3 Approver
- Level 3 Approver approves
  - The data entry fields lock to the Level 3 Approver
- Level 4 Approver approves
  - The data entry fields lock to the Level 4 Approver
- Final Approver approves
  - The data entry fields lock to the Final Approver

Setting up the submit/approval locking:

1. The Excel model will need submit/approval columns for each level in the hierarchy, separate locking columns and separate name columns for each level.
   - The locking columns will use IF statements based on the status listed in the submit/approval columns and if a name is listed for a level.
2. The Excel model will also need a column to determine the first approvable level. In this example, the formula is in column P: =IF(G3<>"",2,IF(H3<>"",3,IF(I3<>"",4,IF(J3<>"","Final"))))
   - This IF formula is looking at the Approval Level Name columns to find the first column that is not blank to determine the first approvable level.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Submit/Approve Columns					Approval Hierarchy					Locking Status					
Manager Submit	2nd Level Approval	3rd Level Approval	4th Level Approval	Final Approval	Manager	2nd Level Approver Name	3rd Level Approver Name	4th Level Approver Name	Final Approver Name	Manager Locking	2nd Level Approval Locking	3rd Level Approval Locking	4th Level Approval Locking	Final Level Approval Locking	First Level Approvable
Submitted					Todd Falco		Gina Hernandez	Erika Bettino	Roy Anthony	LOCK	LOCK	UNLOCK	LOCK	LOCK	3
Submitted					Gina Hernandez			Erika Bettino	Roy Anthony	LOCK	LOCK	LOCK	UNLOCK	LOCK	4
Submitted					Steven Van	Eugene Coe	Gina Hernandez	Erika Bettino	Roy Anthony	LOCK	UNLOCK	LOCK	LOCK	LOCK	2
Submitted					Todd Falco		Gina Hernandez	Erika Bettino	Roy Anthony	LOCK	LOCK	UNLOCK	LOCK	LOCK	3
Submitted					Erika Bettino				Roy Anthony	LOCK	LOCK	LOCK	LOCK	UNLOCK	Final

3. In View design in SecureSheet, modify the advanced filter on the approval locking columns you've created:
    a. Assign a **Seq:** to the advanced filter (the number will vary on how many seq you already have set up)
    b. Select the condition not equal to (<>) to be used for the comparison
    c. List **abc** as the comparison text
    d. Set to **unlocked**
    e. Use **or** as the connector
    f. Select the 2nd condition as **In**
    g. List the 2nd comparison text as **LOCK** or whichever word you choose to use within your Excel IF statement for when the row should lock
    h. Set to **Locked**



Considerations

- Even if you have a direct hierarchy and SecureSheet is inferring the organization hierarchy, you will want to have a column for each approval level's name.
    - The name field will be used in the IF statement when determining if an approval level should be skipped and moved to the next approval level.
    - These columns are also helpful in determining who is next to approve.
    - List approver's name in their highest approval level column and only share them to that inferred rollup approval view. For example, an end user is a 2nd level approver for some employees and a 3rd level approver for others, so you will want to list them as the 3rd level on all the rows they are typically 2nd and share them to the 3rd level approver view.

MROUND in Excel vs SecureSheet

Due to the known issue of floating decimal precision in Excel, MROUND formulas are not always 100% accurate in Excel. A simple solution is to add ROUND to the variable going into the formula.

To see an example of how Excel may result differently with MROUND in Excel, click here.

For example, here's what your original formula may look like:

MROUND(C2*(1+D2),0.25)

Here's what SecureSheet recommends instead:

MROUND(ROUND(C2*(1+D2),6),0.25)

Other rounding considerations:

- Round to 5 decimal places instead of 2 to avoid inconsistent rounding issues in Excel

Blank Cells in Excel vs SecureSheet

When building out an Excel model, there are some differences between how SecureSheet interprets blank cells when doing math compared to Excel.

To help explain the differences about double quotes (blanks) in Excel versus SecureSheet, you may export this Excel file, refer to the examples and explanations, and see the formulas: click here.

Other Resources

- SecureSheet Help in PDF Format - Exports all of the content in SecureSheet Help to a PDF file
- System Requirements
- Example Spreadsheets
- Videos for Administrators
- FAQs

System Requirements

SecureSheet supports the latest version of the following browsers:

- Chrome
- Safari
- Microsoft Edge
- Firefox

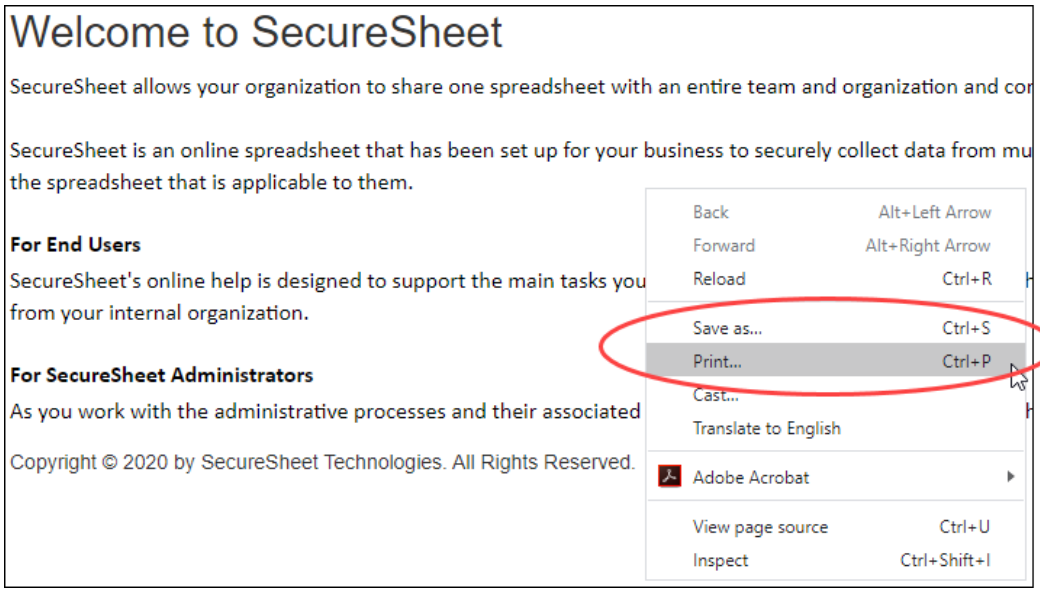
> **NOTE:** SecureSheet may work with older browser versions, but older browser versions are not supported by the SecureSheet Support Team.

PDF of SecureSheet Help

If you would like a complete version of SecureSheet's Help in PDF format, click here. You may save the full SecureSheet Help file in PDF format to your network or local system from your PDF viewer.

> **NOTE:** You will need a PDF viewer in order to open this file. If you do not have a PDF viewer or are unsure or unable to download one, please check with your organization's technical support team for assistance.

If you would like to print a specific topic in SecureSheet Help, you may right-mouse click or hit Ctrl+P in any topic to print the page to a PDF file, send it to a printer, or save it as a file for your reference.


Welcome to SecureSheet
SecureSheet allows your organization to share one spreadsheet with an entire team and organization and cor
SecureSheet is an online spreadsheet that has been set up for your business to securely collect data from mu
the spreadsheet that is applicable to them.
For End Users
SecureSheet's online help is designed to support the main tasks you
from your internal organization.
For SecureSheet Administrators
As you work with the administrative processes and their associated
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Save as... Ctrl+S
Print... Ctrl+P
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