SECURESHEET Year 2 and Beyond

Customer:
Project:
Start Date:
Go-Live Date:

Required	Status	Step		Description	Expected Timeframe	Team Member Responsibility	Additional Comments
		1.0	**Getting Started**	Client reviews any necessary updates to the structure of their prior year's compensation planning SecureSheet.	Week 1	Both	
		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	Client	
		1.2	Make Copies	Make a copy of your previous year's compensation SecureSheet and the Users-Views SecureSheet.	Week 1	Both	
		1.3	Hide SecureSheets	Move both SecureSheets to the Hidden area of your site.	Week 1	Both	
		1.4	Rename Current Cycle Copies	Rename both SecureSheet copies for the current cycle, and update the Group Name.	Week 1	Both	
		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	Both	
		2.0	**Setting 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 make any advanced updates.	Week 1	Both	
		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	Client	
		2.2	Export New Structure	Export your compensation SecureSheet with the newly inserted / deleted column(s).	Week 1	Client	
		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	Client	
		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.	Week 1	Both	
		2.5	Import Updates	Import your updated compensation spreadsheet to SecureSheet.	Week 1	Client	
		2.6	Adjust Views	Adjust the Views by setting any inserted columns to locked, unlocked, or hidden, and adjust the columns per view to accommodate being able to see any inserted columns in addition to those already set to see in the View.	Weeks 1 and 2	Both	
		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	Both	
		3.0	**Refresh Sharing**	Sharing profiles need to be updated to only current cycle end users.	Weeks 1 and 2	Client	
		3.1	Export Current Users-Views	Export the Users-Views SecureSheet.	Weeks 1 and 2	Client	
		3.2	Remove Past User Sharing	Remove Sharing for all users in the previous cycle (except Administrators). This	Weeks 1 and 2	Client	
		3.3	Update Users and View	Refresh the Users tab by removing any users who no longer need access to	Weeks 1 and 2	Client	
		3.4	Import User Tab Updates	Import the updated Users-Views spreadsheet to SecureSheet.	Weeks 1 and 2	Client	
		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.	Weeks 1 and 3	Client	

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).	Weeks 1 and 4	Client
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.	Weeks 1 and 2	Both
5.0	**Test Your Updates and Prepare for Go-live**	Validate the setup for your cycle	Weeks 2, 3 and 4	Client
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	Client
5.2	Validate Statements	Export each statement variation (cover all logic scenarios as applicable) and validate statement mapping accuracy.	Weeks 2, 3 and 4	Client
5.3	Prepare for Go-live	Complete Go-live checklist.	Weeks 2, 3 and 4	Client
6.0	**Continuous Improvement**	Client identifies future revisions based on user feedback after Go-Live.	After Go-Live	Client
6.1		SecureSheet supports project debrief as desired to capture insights and lessons learned for future cycles.	Typically 3 weeks post Go-Live	Both

Team Member Responsibility	Status
SecureSheet	In Progress
Client	Complete
Both	