

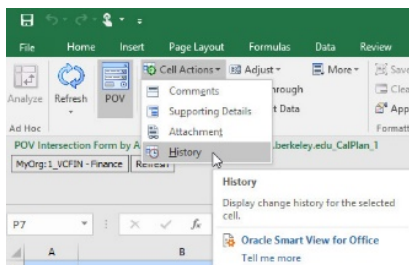
Smart View for Planning

Exercise 6: Cell History, Comments, Supporting Details

In this exercise, you will practice using the functions on the Cell Actions button to add a comment, check cell history, and add supporting details.

History

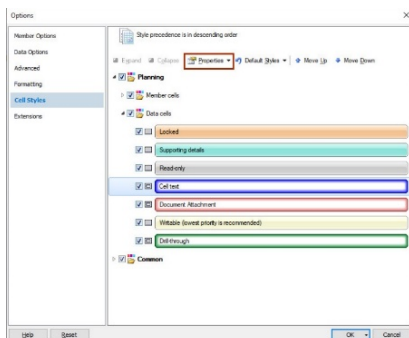
1. Use the Manage Existing Employees and Job Codes form from Exercise 4. Open the form if it isn't already open.
2. On the Monthly Pay Rate tab, edit the pay rate for an employee in one or more months.



4. Review the change and then click the Close button to close the dialog box.
5. With History, you can see what the value was, who changed it and when. But you can't tell why they changed it. So you'll add a comment to document your thinking.

Comment

6. With the same cell selected, open the drop-down list on the Cell Actions button and select Comments.
7. Click the green + button in the dialog box and type a comment like the one shown here that includes the previous and new values as well as the rationale for the change.
8. Click the Save button to save the comment
9. Click the Close command button to save your change and close the dialog box.
10. Click on another cell so that you can see the blue outline on the cell where you added the comment. If you find this blue outline difficult to see, you can change the color of the line or you can use cell shading (but not both) to identify cells with comments. If you'd like to change, go the Smart View ribbon and click the Options button. Select Cell Styles from the left panel, expand Planning and Data Cells so you can select Cell text. Then open the drop-down list from the Properties button and make your selection. Click OK to complete the task.

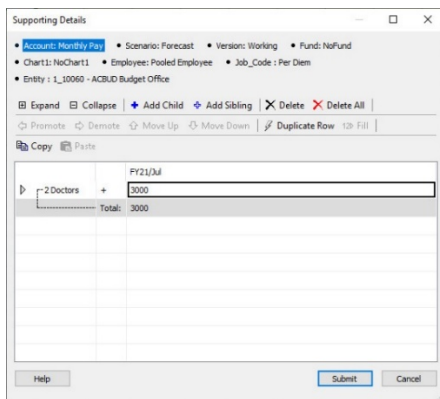


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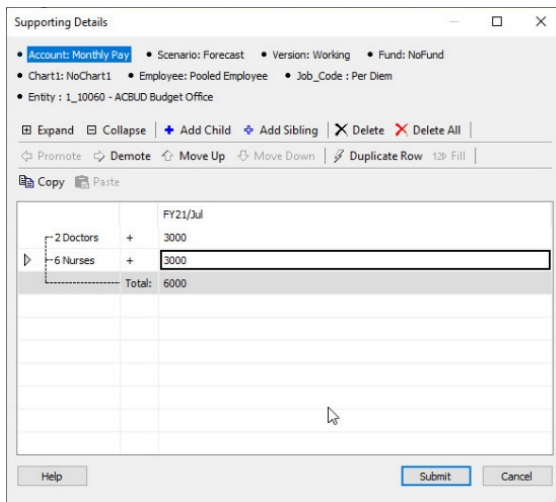
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Supporting Details

11. If the panel isn't open, click the Panel button on the Smart View ribbon to open it.
12. From the HCP Planner Task List, double-click the Create and Manage HCP Pooled Positions form to open it.
13. On the Average Monthly Pay Rate tab, you will enter supporting details to explain the mix of employees. Select a month for a pooled position.
14. From the Planning ribbon, open the drop-down list on the Cell Actions button and select Supporting Details. You can use as many rows as you like to explain parts of the total amount. In this exercise, we'll split the amount into 2 parts. The screen shots below are an example of per diem employees for the health center.
15. Click the Add Child button.



16. Enter a description in the left column where Untitled is selected.
17. Enter an amount in the right column.
18. Click the Add Sibling button to create a second line at the same level as the first. (If you wanted to create a line item that is subordinate to the first line, you would click the Add Child button.)
19. Enter a description in the left column and an amount.



20. Click the Submit button to save the Supporting Details for this cell.

End of exercise