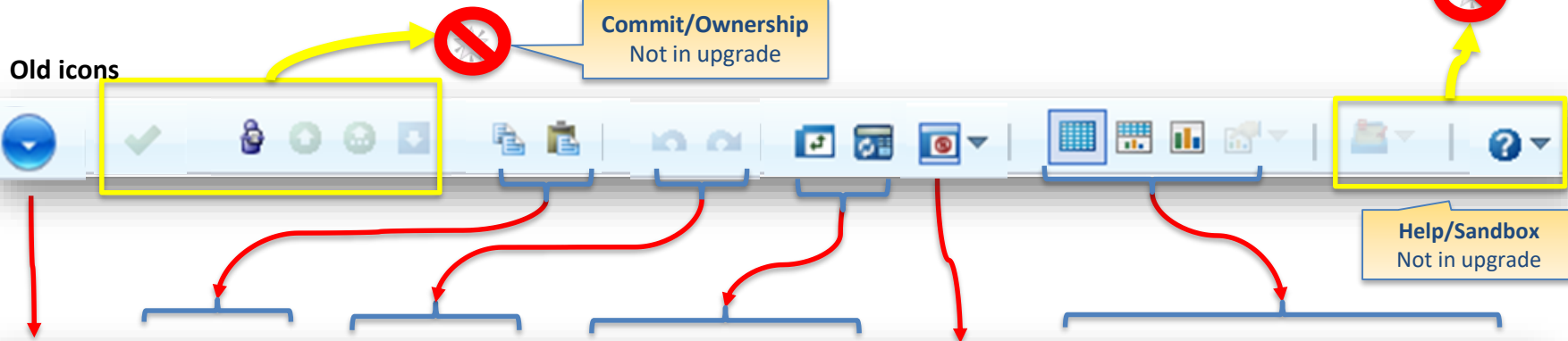


Old vs New Toolbar buttons – overview of changes

Old icons



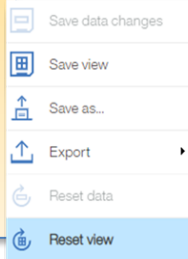
Commit/Ownership
Not in upgrade

Help/Sandbox
Not in upgrade

New icons

Actions Menu

- Save data changes F9 key ...instead of Commit
- Save the view
- Export to pdf/excel (Close BFT using x in browser window)



Copy/ Paste
• No change

Undo and redo
No change

Recalculate
• Transpose
• Recalculate
• Auto recalculate button on/ Off

Zeros
Suppress/
show Zeros

Chart/Grid
Not used

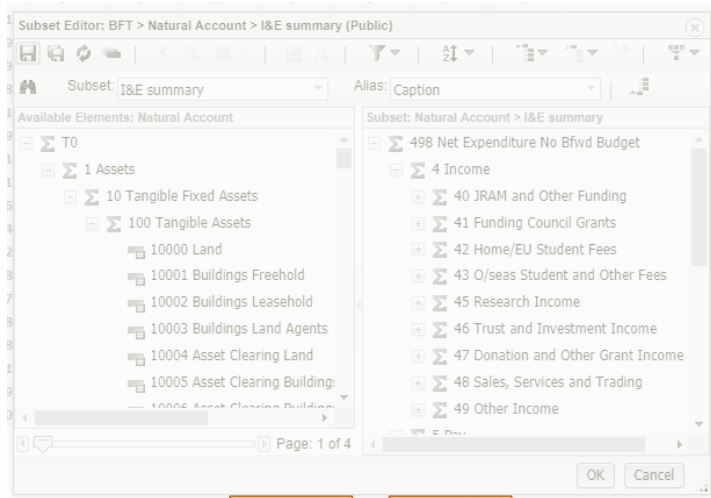
available as a handout for reference

BFT Upgrade Refresher

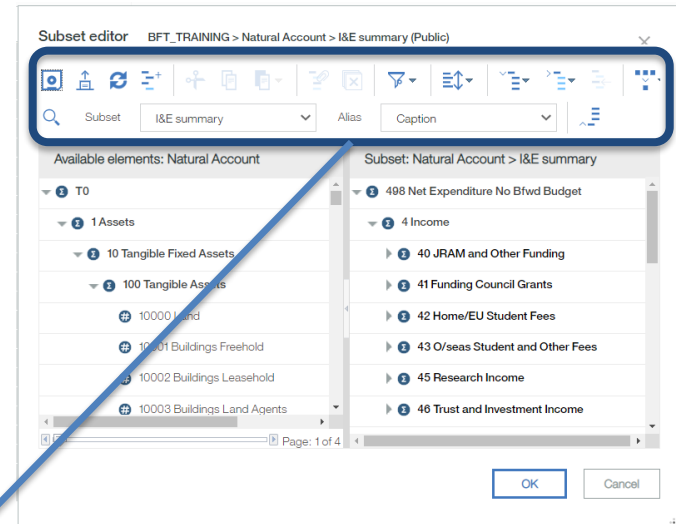
I&E – New look Subset Editor

The function of the subset editor is unchanged but the graphics are slightly different

Old BFT Subset Editor

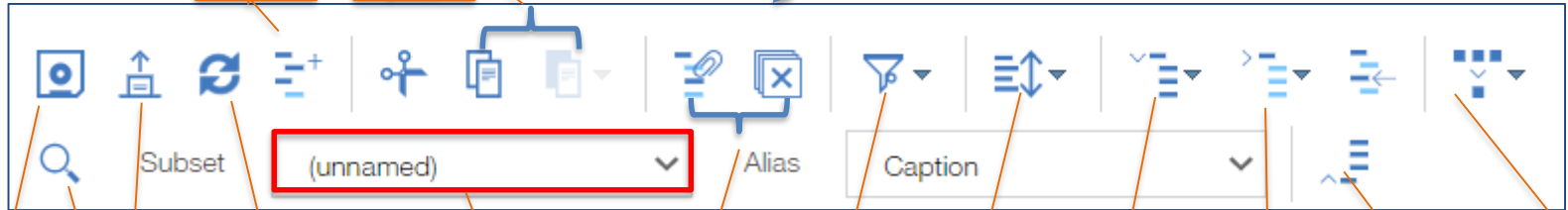


New BFT Subset Editor



Subset all

Copy and paste



Search

Save

Save as

Reload

Subset selector

Keep selected & remove selected

Filter

Sort subset

Tree Expand

Tree Collapse

Expand above

Create custom Consolidation

Refresher training Hints and Tips 1 - navigation

Navigation

- Name of the tab appears in the Row dimension on the left
- If you can't see an expected row: check if zero suppression is turned on
- Don't panic! You are only ever 2 steps from "Reset view"

Subset Editor

- Old binoculars = New magnifying glass
- If all else fails: "Reset all" icon
- Use * as a wild card

I&E only Data Entry

- Always use a Child-level Natural Account 5 digit code, like 61110, 71110 etc!
- 3, 4, digit cost centre codes are postable but will cause odd variances so avoid!

Refresher training Hints and Tips 2 – Data Entry

Data entry

- Save frequently: Use F9
- Right click on cell for other Data spread options menu
- Payroll Journal: minus sign not brackets for -ve financial figures

Shortcut keys (Right click) #1

- “add50” or “sub50” to amend existing number by £50
- > or < spreads data across months (Acts like an arrow)

Holds (Right click) #2

- Protects figures
- Right click cell for list
- “Consolidated hold” for totals
- “Leave hold” for cells
- Release holds once entries made!

Refresher training Hints and Tips 3 - Payroll

Pay Projections

- Projection = FTE x grade
- Exception: non-standard grades (B23, D35, D99) – projection is amount

Summary of Employees

- Other payroll screens remain for multiple changes to employee data – no change in these (accessed via Landing Page icons)
- Filter to reduce the rows and make it easier to view
- Use "Rebuild sheet" to make your changes appear

Other

- Tabs (payroll planning etc) to change multiple employees, Prof Distinctions etc
- Beware! Salary vs Additional salary
- Only Costing Department can change Grade/stage or pension
- If you're not the Costing Dept then contact them, (or Divisional office) to change details

Refresher training Hints and Tips 4 – Employee Record Card (ERC)

- To be certain of accessing the full record card for an individual ALWAYS come through the Summary of Employees at your highest (Cost Centre) level
- Access Employee Record Card (ERC) via Summary of Employees (cursor in Job Title column)
- Note: Shared employees will not be completely visible here
- In ERC, choose A1 to show all GL (pay) codes

- "Other" White / blank profile – rows are available for entry
- "Other" Enter data in ALL cells (no auto c/f)
- You can use shortcuts to enter data
- You can only amend details relevant to your access rights
- "Below The blue line" entries apply to the ID split shown only