

SecureSheet Administrator Guide

END-USER TRAINING BEST PRACTICES

TRAINING OWNERSHIP Clients are responsible for training their end users. The SecureSheet Support Team transfers SecureSheet administration knowledge to designated client administrators. SecureSheet does not provide end-user training.

1 PLAN THE TRAINING

Start with the process

- Explain what users are responsible for and the purpose of the planning cycle.
- Review applicable planning components, guidelines/budgets, and approval expectations.
- Provide key dates: planning open, end-user deadline, approval period, and final close.
- Identify where users should go for policy, data, access, and process questions.

Choose the right format

- Live training — best for a primary walkthrough before launch.
- Recorded walkthrough — useful as an on-demand refresher.
- Quick reference — one-page reminder of core steps.
- Detailed guide — best for complex processes or multiple components.
- Office hours / Q&A — client-led support once planning begins.

2 WHAT TO DEMONSTRATE

- Access/login and opening the correct SecureSheet.
- Worksheet orientation: views, population, editable fields, calculated fields, and instructions.
- Navigation: multiple views, pages, filters, sorting, Go Back, Zoom, Print Page, and Export View when available. For reference: [How to Navigate in SecureSheet](#)
- Entering recommendations and selecting dropdown values.
- Saving changes and reviewing calculated results.
- Guidelines, budgets, totals, warnings, validations, and required comments.
- Final review, including clearing filters to confirm the full population.
- Submit/Approve and what happens to edit access afterward.

Use a realistic example

- Walk through one employee or scenario from review through submission.
- Show how an entry affects calculations, totals, or budgets.
- Include a warning, validation, or comment example when relevant.
- Document less-common exceptions in a detailed guide or FAQ.
- For reference: [Set up a SecureSheet for Training Demo](#)

3 TRAINING & SUPPORT BEST PRACTICES

- Keep training role-specific and focused on actions users perform.
- Schedule training close enough to launch that users can apply what they learned.
- Use the client's configured SecureSheet so users see the actual fields and workflow.
- Separate planner and approver training when responsibilities differ.
- Send the SecureSheet link, deadline, recording/materials, and support contact together.
- Use screenshots and client terminology in written materials.
- Consider making user instructions easily accessible by linking to a PDF within the SecureSheet or adding a dedicated Instructions tab in the SecureSheet. For reference: [Instructions for End Users in SecureSheet](#)
- Client administrators should be the first line of end-user support.
- Separate process/policy questions from technical SecureSheet issues.
- Before escalating a technical issue, capture the user, view, employee/row, expected result, actual result, and error message.

TRAINING READINESS ☐ Roles identified ☐ Dates finalized ☐ Configuration stable ☐ Examples prepared ☐ Materials ready ☐ Support path documented ☐ Submission step covered

RECOMMENDED APPROACH Combine a concise live or recorded walkthrough with a quick reference guide. Add detailed instructions, hands-on practice, or office hours when the process is more complex.