

Using Sandboxes

Sandboxes are an advanced option to create a personal variation of your budget for your own review. You must Take Ownership before creating a sandbox.

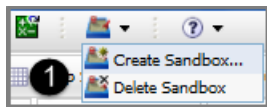
Sandbox Alternatives

Before creating a sandbox you'll want to consider the alternative:

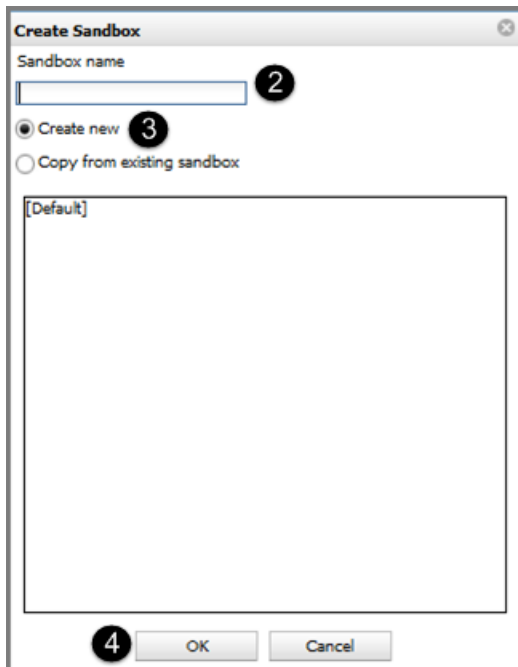
- Budget Versions - Version 2 enables qualifying users to create a second budget scenario (for example, to reflect growth or restructuring).

Create a Sandbox

1. Click the down arrow next to the sandbox icon in the toolbar, and select **Create Sandbox**.



2. Enter a descriptive **Sandbox name**.
3. Select an option:
 - A. **Create new** to create a new budget file/variation from currently committed data. For example, you've committed a budget with a 3% increase for employees but you would now like to look at a 2.5% increase and keep this separate from your Default (committed) budget.
 - B. **Copy from existing sandbox** and select [Default] if you have uncommitted changes and you would like to continue making changes in a separate file/variation. For example, you originally committed a budget with a 3% increase, you then made uncommitted changes (which are automatically stored in the [Default] sandbox) and made it a 2.5% increase. You now want to selectively change some employees back to a 3% increase but in a separate file/variation.
4. Click **OK**.



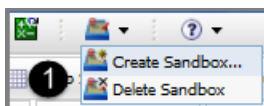
5. Select the sandbox that you want to use from the drop-down menu in the toolbar.
 - The [Default] sandbox always exists; it is your original that you start with.

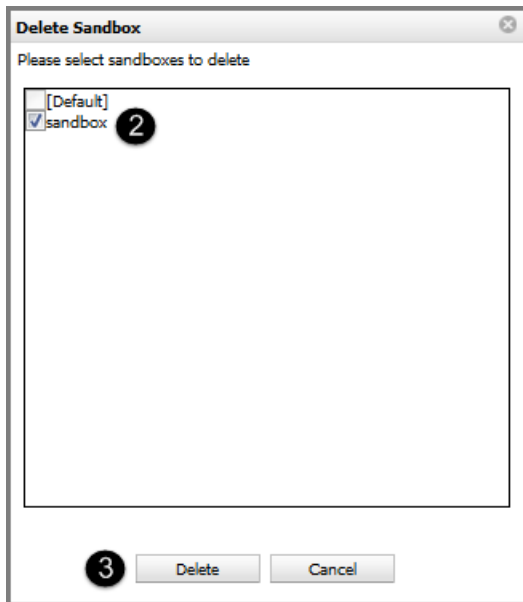


Delete a Sandbox

Delete a sandbox when you are finished using it to avoid confusion.

1. Click the down arrow next to the sandbox icon, and select **Delete Sandbox**.





2. Select the checkbox next to the sandbox you want to delete. You cannot delete the [Default].
3. Click **Delete**.

Sandbox Guidelines

- Start with committed data.
- Create no more than 1 sandbox at a time.
- Delete unnecessary sandboxes to avoid confusion.
- Label your sandbox with a descriptive name (ex: 3.5% Increase Variation).

NEED HELP? Contact IT Support Center • 841-491-4357 (1-HELP) • consultant@northwestern.edu