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Global Corporate Bonus Process and Fusion Workforce Compensation

Manager Training for Product Development UAT Testers

Lisa Gordon
Senior Compensation Manager
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Welcome to Manager Training for the Global Corporate Bonus Process using Fusion Workforce Compensation.

Special Information for PD UAT

Use FinAU test instance:

███████████████████

Open: **June 20**   2 PM Pacific
Close: **June 27**   5 PM Pacific

Send questions and/or feedback
about the tool to the FWC email box:

███████████████████

(please enter UAT in the Subject line of your email)

Today we will be reviewing what's changing this year for the bonus process and provide general process information. We will also present the functionality of Fusion Workforce Compensation, tips in working with Fusion and resources available to answer your questions during the process.

Global Corporate Bonus Process

- Fusion Workforce Compensation (FWC) Tool Pilot
    - Select organizations will be using FWC to input bonus recommendations this year
    - Your organization will be part of the pilot
    - CWB will used by organizations not included in the pilot

For the Bonus cycle this year we will be doing a pilot in Fusion Workforce Compensation. Select organizations will be a part of the pilot. Those organizations are: Product Development (all employees under Thomas Kurian) and Finance organizations under Carol Kelly, Corey West, Ivgen Guner, Greg Hilbrich, Scott Rae, Loren Mahon, and Eric Ball. The pilot organizations will enter their bonus recommendations in FWC. All other organizations will enter their bonus recommendations as usual in Compensation Workbench.

Global Corporate Bonus Process
General Info

Timelines
- FWC will be open to managers on approximately July 2
- Each LOB may establish their own internal timeline for the process. Check with your manager for the specifics for your organization

Budgets
- Budgets are set at the top executive level for each organization. Each LOB head may determine the method of allocating budgets to their organization

- The FWC Modeling feature is available to assist in pushing down budgets based on specific criteria

Fusion Workforce Compensation is scheduled to open to you on approximately July 2. Your organization may have an internal timeline for the process that allows for review and approval within your organization before final submission. Please check with your manager on specifics for your organization.

Budgets are published to the top executive level of the organization. Each LOB leader may determine the method of cascading budgets in their organization. FWC has a modeling feature similar to the budget wizard in CWB to assist managers in pushing down budgets.

Global Corporate Bonus Process
General Info (cont'd)

Eligibility

- Review the eligibility document posted on the Fusion Workforce Compensation web site and be sure your employee population is reflected correctly on your FWC worksheet (FWC url: ███████████████)
  - Remember not all employees are eligible for the Global Corp Bonus process

Communication

- **Do not** communicate a bonus until final approval is obtained
- Always check FWC <u>before</u> you communicate to ensure that the bonus amounts haven't changed

Please review the eligibility document for the bonus process and be sure your employee population is reflected correctly on your FWC worksheet. Remember that not all employees are eligible for the Global Corporate Bonus. The eligibility document is posted to the new Fusion Workforce Compensation website.

Remember that bonus amounts should not be communicated until final approval has been received. You will receive the OK to communicate to your employees from your manager or your HR manager. Also amounts can sometimes be adjusted during the approval process so always check in FWC before communicating a bonus.

What is Fusion Workforce Compensation?

Fusion Workforce Compensation (FWC) is an Oracle Self Service Application for managing compensation processes, allowing you to -
- Model and allocate budgets
- Publish (pass down) budgets to subordinate managers
- Rate, Rank and Award individual employees
- Review historical compensation information
- View and download employee information for off-line work for further analysis
- View submission status of subordinate managers

Note: Firefox is the preferred browser for Fusion applications

What is Fusion Workforce Compensation?

FWC is an Oracle Self-Service Application for managing compensation processes. The tool allows you to model and allocate budgets, publish or pass down budgets to managers below you, rate and/or rank employees, make bonus recommendations, review recommendations submitted by your subordinate managers and submit recommendations for your entire organization to your manager.

You can also view historical compensation information and download employees information and work off-line.

When working with Fusion applications, please remember that Firefox is the preferred browser.

How to Access FWC

3. Log on using your SSO credentials

Sign In
Enter your Single Sign-On user name and password.
Username: first.last@oracle.com
Password: •••••••• (Go)

Lost your password?

To access FWC from the ▮▮▮▮▮▮ homepage, select the ▮▮▮▮▮▮▮▮▮ link from the ▮▮▮▮▮▮ ▮▮▮ menu.

On the next screen, click the ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮

At the ▮▮▮▮▮ screen, enter your ▮▮▮▮▮▮▮▮ credentials.

Once in Fusion, click ▮▮▮▮▮▮▮ and look for ▮▮▮▮▮▮▮▮▮▮▮▮ under the ▮▮▮▮▮ ▮▮▮▮▮▮▮ header.

Workforce Compensation

The Workforce Compensation landing page has two panes – ███████████ ████ has the headers ██████████████ ████████████ which open their specific worksheets

Click the ██████████████████████████
The ████████████ lets you view your subordinate managers worksheets

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The Workforce Compensation landing page has 2 sections: ████████████ and the ████████████ or ████████████████.

████████████:

Items found under ████ include ██████████████████ as indicated by ██ and ████████████ as indicated by ███.

Clicking one of these topic headers will always return you to the ██████████████████████.

Links to specific plans are under the appropriate header, for example the ████████ as indicated by ███ under the ████████████ header and ████████████ as indicated by ███ under the ████████████ header.

████████████:

- The ████████████ sections indicated by ██ and ██ provides the user with a snapshot of information about the individual plan or pool.   This information includes the user's access level or, in the ████████████ section , the number of eligible workers and the overall budget.

- The ████████████████ page also includes ████████ short cuts which will █████ you to the ████████ page where you can take a specific action.

- Both sections have links to their specific worksheet just like you see under █████. Fusion often provides several different ways to navigate to a page.

████████████████:

- If you have direct reports who are managers, you will see them in the ████████████████ indicated by ██. This allows you to view their worksheet and even "proxy" actions on their behalf. If your directs have subordinate managers, use the ██████ feature and you can also see their worksheet.

Bonus Tasks

1. Allocate Budget / Budget Modeling
2. Rank / Rate Employees
3. Work with Excel
4. Award bonus
5. Review Subordinate Mgr's Recommendations
6. Submit to Next Level

In the next several sections of our training we will review the tasks that can be done as part of making bonus recommendations using Fusion Workforce Compensation.

- First we will start with working with your budget. This will include determining if you will pass down budget to subordinate managers,
  reviewing how to build a budget model, applying a model, and publishing a budget

- The next task is Rate and/or Rank your Employees

- We will also give you instructions on how to download your worksheet to an excel spreadsheet

- Then we will show you how to Award bonuses to employees

- After awarding bonuses you will review your subordinate manager's recommendations and finally

- You will submit your recommendations to the Next Level to obtain your manager's approval

The first task is budget allocation.

Allocate Budget

Go to ███████████ and click either link for the budget pool worksheet

████████████████████████

The <u>first</u> time the budget is selected you must chose a ███████
Your selection will

██

To allocate a budget, click on the ████████████ header under █████.

Then click either the █████████████ under the ████████████ Header or under the ██████████ to take you to the ████████████. These 2 options are indicated by the red arrows.

The first time you go in to the ████████████ section you will be asked to chose a budget method. This step is very important - it will determine the budget access of your subordinate managers.

The ██████████ options are:

- ██

  All your subordinate managers will be ████████████ for the budget worksheet. Choose this option if you will make all the awards yourself.

████ ██████

- ██ (this is the most frequently used option)
- Select this option to pass down budgets to your direct report managers. Your direct report managers will have ████████████ access. You can adjust the settings for specific direct report managers within the budget worksheet.

████ ██████

████████████████████████████████

- Select this option if you decide to pass down budgets to <u>**all**</u> subordinate managers. <u>**All**</u> subordinate managers will have "████████████ access You can adjust the settings for specific subordinate managers within the budget worksheet

- Selecting the ██ or ██ option will allow you to ████████████████████ of subordinate managers if needed.

Allocate Budget

Enter budget amounts in the ███████████████ column

The ██████████ row is your budget for <u>**bonus awards to your direct reports**</u>

██

You must **publish** the Budgets so subordinate managers can see budgets

Click the ███████████████████████████

If publishing budgets to only a few managers, ██████████

The budget can be distributed to subordinate managers manually by entering amounts in ████████ ████████████████ column as indicated by the red box.

The ██████████████ row is the budget for bonus awards to your direct reports.

To publish your budget ██████████████████████████████████ and █████████████. You can choose to publish ██████████████████ or ███████████.

You must publish budgets for subordinate managers to see a budget on their worksheet.

Budget
Modeling

In order to distribute your budget you may need to do some modeling first.

Budget Modeling

- Models make it easy to see how different allocation methods and criteria affect your budget
- Who might create Models –
  - Managers who intend to pass down budgets to subordinate managers, <u>or</u>
  - Managers who intend to make the allocations themselves
    (holding the entire budget)

    Different models can be created, previewed and applied
    <u>*before*</u> publishing the budget

  NOTE: Applying a Model will <u>overwrite</u> any previously entered bonus amounts

  **Models should never be applied
  after the budget has been published**

Models make it easy to see how different allocation methods and criteria affect your budget distribution.

Different models can be created, previewed and applied. Your modeling should be completed before you publish a budget.

If bonus amounts have been entered in FWC before you apply a model, they will be overwritten when you apply a model.

Create a Budget Model

On the ███████████████████████████████
███ ████████████████████████████████

Select ██████████ ██████████

Enter the ████████████████████████████████
████████████
██████████████████████████
████████████████████

To create a budget model, click the ████████████████ on the █████ worksheet.

Select █████████████.

Enter a model name – choose one that is meaningful to you.

The plan name and other info will default to values determined by the plan administrator.

Click ████████.

Create a Budget Model

1. Under ███████████████████████████ from the drop down list
2. Select up to ███████████████████████
   Note: ███████████████
3. Click ███████

██
██
██
██
██

Under the ███████████ section ████████████████████ from the drop down list indicated by ██.

Under the criteria section enter up to ██████ for the model. Use the drop down lists to make your choices. ██
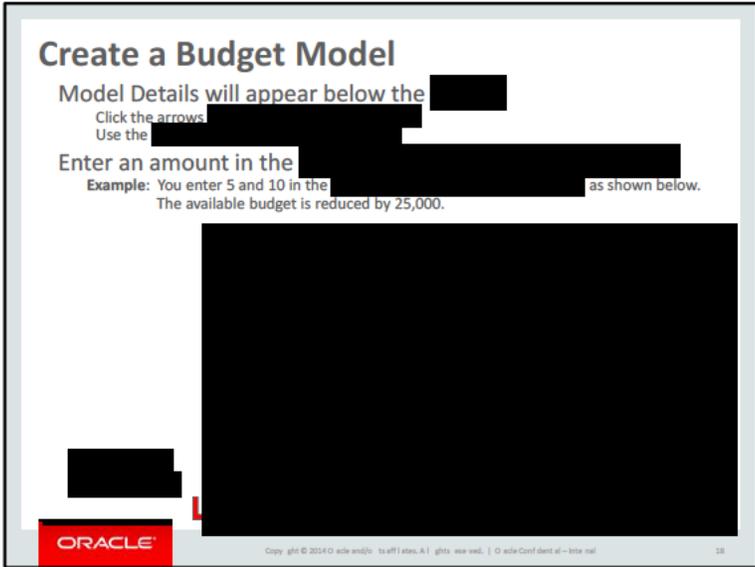
Then click ████████

The model details will then appear below the ████. You can now enter an amount in the ████████ ████ column.

Click the ██████████████████ button.

Create a Budget Model

1. Currency is displayed in the Model title row
2. The Model contains a ███████████████████
3. And two tabs: ███████████████ and ███████████

On the █████████████████ screen you can see the currency in the title row as indicated by (1).

2 - In the █████████ section you can see the ████████████████████.

3 - There are █ tabs on this screen – ████████████████████████████████████ ████████████████████████████.

Create a Budget Model

Click ███ to return to the ████████████ landing page

███
███

Optional:

If you have <u>NOT</u> published the budget yet, you can apply the results of your model

███████████████████████████

███
███
███
███

Models should never be applied
<u>**after the budget has been published**</u>

Click ███████ to return to the ██████████████ landing page or ████████████ to go back to the
███████████████████████████.

If you have not published the budget yet, you can apply the results of the model. Click the ██████
███████ button. Choose ████████████████████ from the drop down list

Go to the ██████ worksheet and confirm the model amounts have been applied.

The next section will show you how to enter ratings and/or rankings.

Rank/Rate Employees

From the ▇▇▇▇ page, click either link to open the worksheet for the ▇▇▇▇ ▇▇▇▇

On the ▇▇▇▇

Employee Name	Region	Country	Legal Employer	Career Level	Job	Alerts	Base Salary - Current	Annualized Full-Time Salary - Current	Eligible Salary	Percentage of Eligible Salary	Bonus Amount	Currency	Ranking	Compensation Performance Rating

To rate or rank your employees from the ▇▇▇▇ page, click the ▇▇▇▇ either under ▇▇▇▇ or under ▇▇▇▇.

Always save any entry you make.

The requirements for entering rankings or ratings is determined by Line of Business. Check with your manager if you are unsure of the process for your organization.

The next section will give you instructions on how to export an excel worksheet to work off-line.

Excel Export

Export the Compensate Workforce worksheet to Excel -

███

Export – Is a two-way process for ██████████████ ████████

- Requires download and installation of the ████████████████
- Configuration of Excel
- The exported file will be a macro based file

NOTE: You must download the ██████ each year to ensure you have the most recent version.

You may export your worksheet to excel by clicking the ██████ button.

Export is a two-way process that allows you to ████████████████████ if you choose.

To use this feature you must download and install the ████████████████ and configure excel.

Please note that you must download the ██████ each year to ensure you have the most recent version.

Excel Export
Installing the ▮▮▮▮▮▮▮▮▮▮

Each year, before using the ▮▮▮▮▮▮▮▮ you must **download and install the** ▮▮▮▮▮▮▮▮▮ This will ensure you have the latest ADF DI version.

1. Go to **Navigator →Tools →** ▮▮▮▮▮▮▮▮▮▮▮
   ▮▮▮▮▮▮▮▮▮▮ Click the link and download the .exe file to your desktop.

2. Double click the setup.exe file to install the ▮▮▮ 🖳 setup.exe

3. Go to your computer's Control Panel > Programs and Features
   page and verify the ▮▮▮ has been installed

To download and install the ▮▮▮▮▮▮▮▮▮▮▮ go to ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮ and click the link.

Double click the setup.exe file to install the ▮▮▮▮.

Then go to your computer's control panel – "Programs and Features" page and verify the ▮▮▮▮ has been installed.

Configure Excel when using ████████████████

After installing the ██████████████ **verify the** ██ **add-in is active in Excel**

Excel 2007 configuration settings:
1. Open Excel 2007
2. Click the Microsoft Office Button (the button is a circle with the red, blue, yellow, green squares in it)
3. Click Excel Options (bottom of the window)
4. Click Trust Center → Trust Center Settings
5. Click ██████████████████████████████████████
6. Under ██
████████████
8. Under Excel Options, click Add-Ins and verify "██████████████ *Add-in for Excel*" is in the *Active Application Add-ins* list.

If the ████████████████ **is not** in the Active Application Add-ins list:
1. Go to Excel Options; click Add-Ins.
2. Go to the "Manage" drop down at the bottom of the page
3. Select 'Disabled Items' from the list and click Go.
4. Find and highlight the ██████; click Enable
5. Return to the 'Manage' list, select 'COM Add-ins' and click Go
6. In the 'COM Add-ins' list, check the box for the ██████ and click OK to enable the add-in.
7. Under Excel Options, click Add-Ins and verify ██████ and click OK to enable the add-in. ██████████████ is in the Active Application Add-ins.
8. Under Excel Options, click Trust Center, and click Add-Ins (Note This add-ins area is <u>different</u> than the add-in area in the previous steps).
9. Verify that none of the three Add-ins boxes are checked (*Require Application Add-ins to be signed by Trusted Publisher; Disable notifications for unsigned add-ins (code will remain disabled); Disable all Application Add-in (may impair functionality)*).

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After installing the ██████████████████, verify that it is active in excel by using the detailed instructions on this slide.

Configure IE when using ▮▮▮▮▮▮▮

NOTE: Firefox is the preferred browser for the Fusion applications

Once Excel is configured, check your Internet Explorer Browser Settings:

Navigate to Tools => Internet Options and choose the Security tab.
- Select Local Intranet and click the Custom Level button.
- Under ActiveX controls and plug-ins , set "*Initialize and script ActiveX controls not marked as safe for scripting*" to "Prompt".
- Under Downloads set "*File download*" to "Enable"
- Click OK

When downloading the spreadsheet, select "Yes" when prompted to accept an ActiveX control to complete the process.

Still having issues? Here are some additional areas to check:

Set Internet Trusted Site options and check the Trusted Site settings.
- Go to Internet Options > Security. Select Local Intranet zone
- Click the Sites button
- You should have *Automatically detect intranet network* checked marked.
  a) Click the 'Advanced' button
  b) Insure the box for '*Require server verification (https) for all sites in this zone*' is unchecked.

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As stated earlier, Firefox is the preferred browser for Fusion applications but once excel is configured, you can check your IE browser settings by following the instructions on this slide.

Award Bonuses

This section shows you how to award bonuses to employees.

Award Bonus: View Your Budget

You may need to adjust the ▮▮▮▮▮▮ to see your budget on your ▮▮▮▮▮▮▮▮ worksheet. If the ▮▮▮▮ filter shows ▮▮▮▮▮▮ as indicated by ▮, you will not see your budget as indicated by the ▮▮▮▮▮. Select ▮▮ from the drop down and click the arrow to the right of ▮▮▮▮ as indicated by ▮.

After clicking the arrow, your budget amounts should now display.

Award Bonus: View Your Budget

Method 2: Another way to view your budget is from the ████████. Click the ████████████ link and scroll to the right to see the budget information.
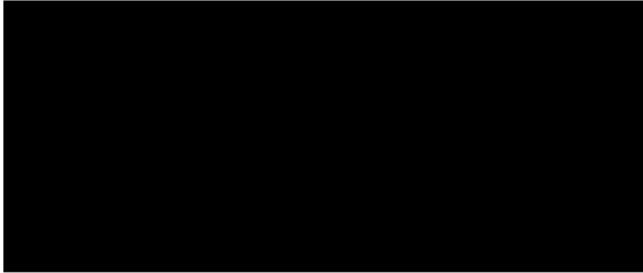
Another way to view your budget is from the ████████.

Click the ████████████████ tab and scroll to the right to view your budget information.

Award Bonus: Entering Bonus Amounts

Enter bonus amounts directly in the ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮ -
Enter either a 'Percentage of Eligible Salary' or a 'Bonus Amount'
After making entries, save your work
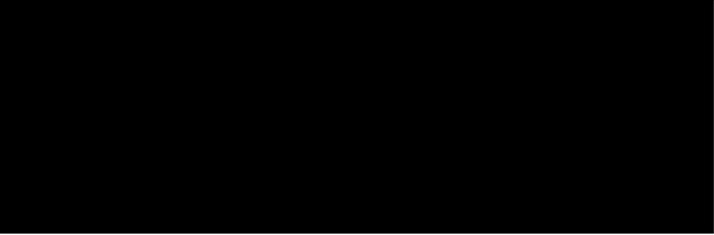
WARNING!
DO NOT SUBMIT until **all** your subordinate managers have submitted their work to you. Your submittal **removes** their Update access.

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Please review the employees on your spreadsheet. If you are missing an employee, or if there is inaccurate information, please contact your HR Manager.

Please review the eligible salaries carefully as these are used to calculate budgets. If the eligible salary is different than the annual salary be sure to understand why they are different.

You may enter a bonus as a % of eligible salary or an amount directly in the worksheet. After making entries, please remember to save your work. You may also export the worksheet to an excel spreadsheet based on the instructions given earlier in this training and then ▮▮▮▮ your entries. ▮▮▮▮▮▮ instructions will be reviewed on the following slide.

Please do not submit your bonus recommendations until all your subordinate managers have completed their recommendations. Submitting will make it so all managers below you won't be able to make any changes to their recommendations.

Award Bonus: ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮

1. Click the ▮▮▮▮▮ icon on the <u>far right</u> in the ▮▮▮▮▮▮▮▮▮ ▮▮▮▮▮ header
2. Click Yes on the ▮▮▮▮▮ pop up. You will need to log in using your SSO credentials
3. Once the ▮▮▮▮▮▮▮▮▮▮▮ check that the employees have populated the file and the ▮▮▮▮▮▮▮▮▮▮▮
4. Verify the ▮▮▮▮▮ has no background color
5. If your ▮▮▮▮▮

To ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮, click the ▮▮▮▮▮▮▮ icon on the far right in the ▮▮▮▮▮▮▮▮▮▮ header as reviewed in an earlier section of this training.

Click "yes" on the ▮▮▮▮ pop up. Then log in using your SSO credentials.

Once the ▮▮▮▮▮▮▮▮▮▮▮, check that the employees have populated in the file and the ▮▮▮▮▮▮▮▮▮▮▮▮▮.

Verify the ▮▮▮▮▮ has no back ground color.

If your ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮

Award Bonus: Excel Upload

To upload your recommendations – click the "Upload" button and click "OK" for the default upload options.

The upload will process and when it is finished you will see the "Invoke Action" pop up that says "worksheet was uploaded".

Click "OK" and scroll to ▓▓▓▓▓▓ in the spreadsheet to verify the rows updated successfully.

In FWC, click the plan link to refresh the worksheet and verify your changes were uploaded.
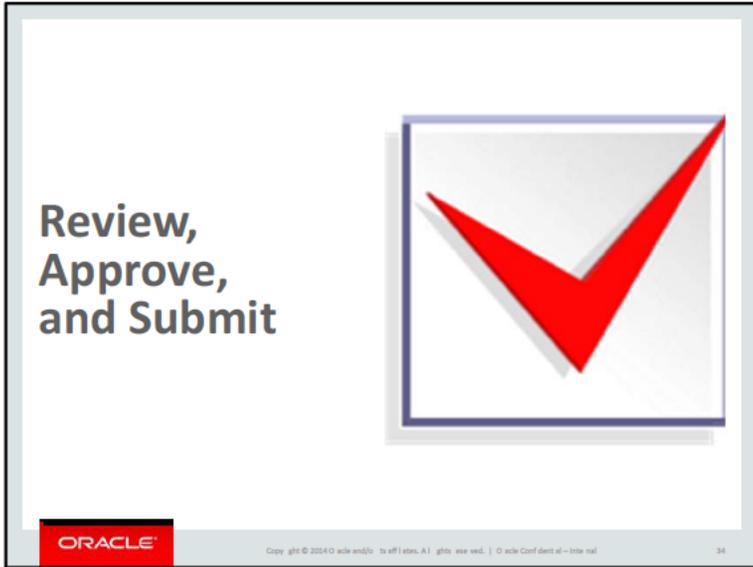
In the next section we will cover how to review, approve and submit your recommendations.

Review

If subordinate managers need to make corrections or you need more information before approving,

Enter a Comment explaining the issue the manager must correct

Enter a Comment asking for the needed detail
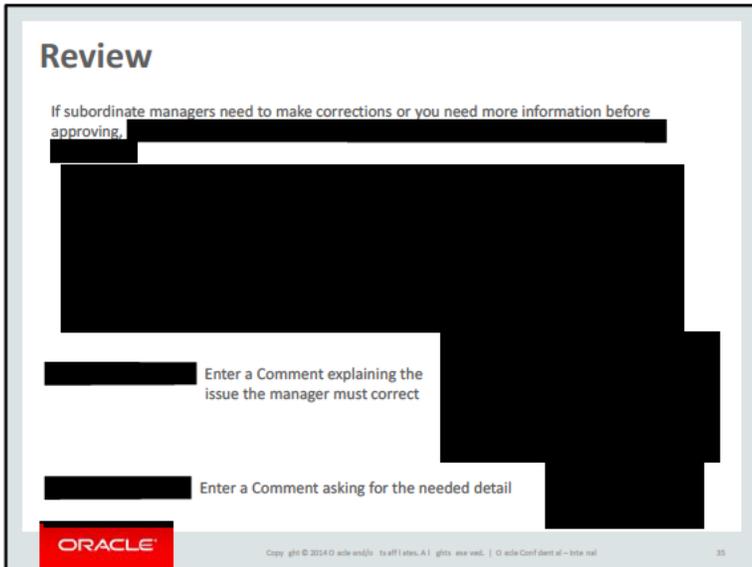
If your subordinate managers need to make corrections after they submitted their recommendations or if you need more information before approving, you may make those requests within the tool.

Click either ▉▉▉▉▉▉▉▉▉▉ or ▉▉▉▉▉▉▉▉ and ▉▉▉▉▉▉▉▉▉▉▉▉▉▉▉

Review

From the ▮▮▮▮▮▮ you can see your Approval status and the status of your subordinate managers:
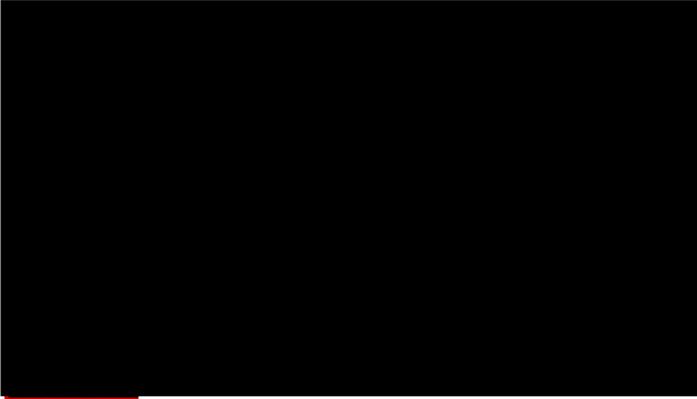
You can review the status of your subordinate managers from the ▮▮▮▮▮▮.

Approve

Approve your subordinate managers submissions via the ███████. Click the drop down arrow to ███████████ and make a selection:

After taking action:

You may approve your subordinate managers' submissions via the ████████ tab. Click the drop down arrow to ██████████████ and select either ███████████████████████.

To approve ███████████ – ██. Then chose ████████████████.

Choosing ██████████ will approve your entire hierarchy.

After approving you can verify the approval in the ██████████ column.

Submit Warning

As noted earlier – **DO NOT submit until your subordinate managers have completed their submission to you**

Submit only when your entire organization has completed their recommendations.

Submit to Next Level

There are two ways to submit for approval to your manager

NOTE:
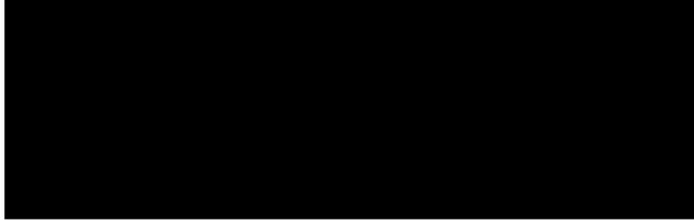
There are two ways to submit your recommendations for approval to your manager.

or

Submit to Next Level
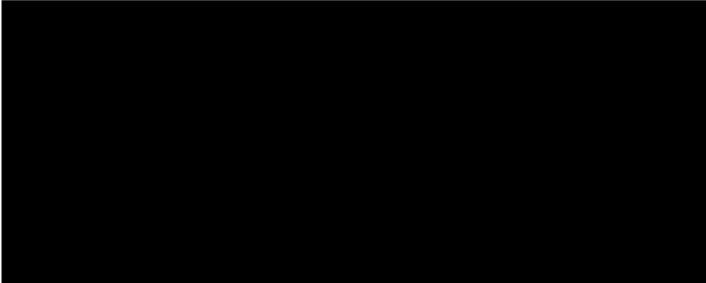
You have now finished the recommendation process.

Please remember not to communicate any recommendations until you have been given the OK to do so by your manager or HR manager.

Fusion Tips

In this next section, we will share with you some helpful tips in using a fusion application.

Fusion Tips
Which Browser to Use

- **Firefox** is the preferred browser

- Use the latest version of Mozilla Firefox
    - Check your version:
        From the Menu Bar
        select Help > About Firefox
    - Download the latest browser version
      at MyDesktop

- Other Browsers
    - Chrome
    - Internet Explorer
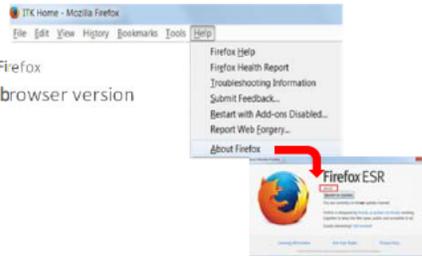
As we stated earlier, firefox is the preferred browser. Be sure to use the latest version. You may find out what the latest version is by following the instructions on this slide. Download the latest browser version from "MyDesktop" if needed.

You may use Chrome or IE as well.

Fusion Tips
Collapsible Panes

- Gain more working space by collapsing panes where possible
- Need more space to see your Worksheet? █████████
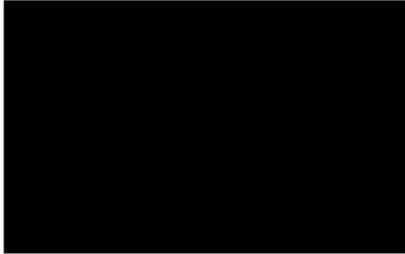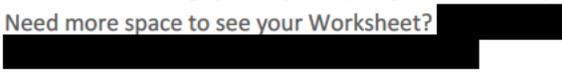
You may need more space on your screen when working on your worksheet. If needed you can collapse the ████ pane by ████████████████████ – indicated by the ████████████.

Fusion Tips
Nested Scroll Bars

Fusion has nested scroll bars (inner and outer)

- You may need to use the vertical scroll bar to reveal the horizontal scroll bar at the bottom

- Here, the horizontal scroll bar was out of sight

- By using the vertical scroll bar, the horizontal scroll bar was revealed

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Fusion applications have nested scroll bars. You may need to use the vertical scroll bar to reveal the horizontal scroll bar. The example on this slide shows that the horizontal scroll bar was out of sight and by using the vertical scroll bar, it was revealed.

Tools and Resources

Questions about -

- **Timeline and Budget** for your organization: Contact your manager or HR Manager
- **Eligibility:** Contact your HR Manager
- **Fusion Workforce Compensation access and functionality:** Email: fusion-comp_ww@oracle.com

Fusion Workforce Compensation web site:
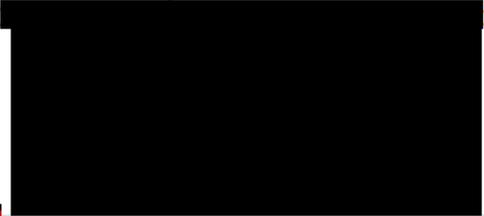
Questions about your organization timeline and budgets for this process should be directed to your manager and/or HR Manager.

Questions about eligibility, after you have reviewed the eligibility rules, can be directed to your HR Manager or the fusion comp mailbox at

Send questions on FWC access and functionality to the fusion comp mailbox at

These training slides, the bonus eligibility document and a FWC managers guide will be available on the Fusion Workforce Compensation website at the url shown on this slide.

Product Development UAT Reminder

Use **FinAU** test instance:

█████████████████████

Open: **June 20**   2 PM Pacific
Close: **June 27**   5 PM Pacific

As part of UAT, these managers must <u>pass down budget</u>
to their subordinate manager:

Christophe Job pass down to **Naggi Asmar**
Michael McGrath pass down to **Min Lu**

Send questions and/or feedback
about the tool to the FWC email box:

█████████████████████

(please enter **UAT** in the Subject line of your email)

Questions

This concludes our training on how to use Fusion Workforce Compensation to make your Global Corporate Bonus recommendations.