

Annual Focal Program (Sales & Non-sales) and Workforce Compensation

HR Training

Oracle Compensation

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Agenda

- 1 General Process Information
- 2 Workforce Compensation – HR Validation
 - How to Access
 - Eligibility Review
 - Worksheet Manager Change
- 3 Workforce Compensation – Manager Planning
 - Allocate, Model and Distribute Budget
 - Export to Excel
 - Rate Employees
 - Make, Review, Approve and Submit Recommendations
- 4 Tips, Resources and Next Steps

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Intro: Good morning everyone – thanks for joining me this morning. I have a lot of information to share with you today. Things are still evolving but I'll share with you everything we know right now.

We know that the timeline is compressed and you have multiple priorities so I wanted to get this information to you sooner rather than later.

Today we will be reviewing key general process information, the functionality of Workforce Compensation that you will need as HR, the functionality you'll need to help managers use to do their planning, along with tips for working with Workforce Comp and tools and resources available during the process.

My team is also putting together a FAQ document that we'll post on the wiki. Amanda Crane will be managing the chat in today's session. I'll pause and take questions at the end of each section.

Let's get started.

Annual Focal Program

General Information

• Timeline

- The corporate timeline is available on the Compensation Wiki
- Each LOB may establish their own internal timeline for the process that ensures Executive review and approval before the Corporate submission date

Monday, September 26 – Plan open to HR to start their validation – waiting for final budget approval

Friday, September 30 at 9:00 PM PST until Saturday, October 1 at 9:30 AM PST - **PLANNED SYSTEM OUTAGE FOR PATCHING**

Monday, October 10 & Tuesday, October 11 - **MANDATORY BLACKOUT PERIOD FOR REL11, PLAN WILL BE UNAVAILABLE**

Wednesday, October 19 - All recommendations should be submitted to the LJE/Catz/Hurd level to allow them time to review

Friday, October 21 - Plan Closes at 5:00 PM PACIFIC, absolutely no flexibility in this deadline due to the HCM Release 11 go-live on October 24th.

Thursday, December 1 - Base Salary Increases Effective

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Here is the corporate timeline which can be found on the wiki. Each LOB may establish their own internal timeline for review and approval before the corporate deadline.

The plan is open to HR for validation. Several issues have been identified on eligible salaries and salary ranges. OAL has completed the fixes for most of the data issues. We are also still waiting on final budget approval. The budgets will be published and an update will be posted to the wiki as soon as we receive approval to move forward.

All recommendations should be submitted to LJE/Catz or Hurd by the end of the day Wednesday, October 19 for their review.

The plan closes at 5 pm pt on Friday, October 21. This deadline is due to the HCM Release 11 go-live.

Increases will be effective Thursday, December 1.

Any updates will be posted to the wiki.

Annual Focal Program

General Information

- Workforce Compensation Tool Down Times
 - Scheduled Maintenance:
September 30 @ 9PM PT – October 1 @ 9:30AM PT
 - Blackout Period for move to the Public Cloud (Release 11):
October 10 @ 12AM PT – October 12 @ 12AM PT

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As you saw on the previous slide there will be a couple of tool outages. These are the known down times for Workforce Compensation, where both HR and managers will not be able to access the tool. During these times there will be no access to the module – no viewing – no downloading, etc.

Annual Focal Program

General Information

- Eligibility

- Review the eligibility document posted on the Workforce Compensation homepage and the Compensation Wiki
- Be sure the employee population for your organizations are correctly reflected on the WC worksheet
 - Not all employees are eligible for all of the corporate programs
- 3 countries aren't eligible for this program
 - Argentina, Brazil and Venezuela
- Employees hired after September 1 aren't eligible

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As you know, not all employees are eligible for all of the corporate programs. Please review the eligibility document for this year's process and be sure your employee population is reflected correctly on your Workforce Comp worksheet. The eligibility document is located on both the compensation wiki and the Workforce Compensation homepage.

3 countries aren't eligible for this program. Argentina, Brazil and Venezuela. Special focal programs are run for both Argentina and Venezuela because of their high inflation. Brazil employees receive a mandatory increase every year.

Employees hired after September 1 aren't eligible for the program. Employees who were otherwise eligible for the program but terminated after September 1 may show in the module.

Annual Focal Program

General Information

- Tool

- All organizations, sales and non-sales, will use Workforce Compensation (WC)
- Data in the module is effective September 1
 - Manager changes and other changes after that date won't be reflected in the module

- Budgets

- Budgets are set at the top executive level for each organization based on eligible salaries for eligible employees on September 1. Each LOB head may determine the method of allocating budgets to their organization
- Separate budgets for non-sales base increases, sales base increases and sales ATV increases
- WC Modeling feature is available to assist in pushing down budgets based on specific criteria

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All organizations, sales and non-sales, will use Workforce Compensation to enter their compensation recommendations in the same worksheet. Managers will enter base salary increases and ATV in different columns, depending on employee eligibility. Columns will be grayed out if an employee is ineligible for that particular component.

Data in the module is effective September 1 – changes after that date won't be reflected in the module

Budgets are published to the top executive level of the organization based on eligible salaries for eligible employees on September 1. Each LOB leader is then able to determine the method of cascading budgets in their organization. There will be separate budgets for non-sales base increases, sales base increases and sales ATV increases.

Workforce Compensation has a modeling feature to assist managers in pushing down budgets, which we will review later in the presentation.

Annual Focal Program

General Information

• Job Changes

- Non-sales to sales/presales
 - Job changes from non-sales to sales/presales **will not** be allowed in this program
 - ATV column will be grayed out for employees currently in non-sales positions
- Sales/presales to non-sales
 - Job changes from sales/presales to non-sales will not be allowed in this program
- Changes moving employees on to or off of a variable plan will not be managed through this program
 - This type of change will need to be done through a normal workflow transaction
- Any US job change from as overtime eligible position to non-overtime eligible position requires a job classification form.
 - Forms can be found on the wiki
 - Forward completed forms to corpcomp_us@oracle.com by COB October 14

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Job changes from non-sales to sales/presales will not be allowed in this program. The ATV column will be grayed out for employees currently in non-sales positions. Job changes from sales/presales to non-sales will not be allowed either during this program.

Changes moving employees on to or off of a variable plan will not be managed through this program. This type of change will need to be done through a normal workflow transaction.

Any US job change from an overtime eligible position to a non-overtime position requires a job classification form to be completed. These forms can be found on the wiki. Forward completed forms to corpcomp_us@oracle.com by COB October 14. We ask managers to review salaries for employees changing OT status and whenever possible the new salary should be at least the minimum of the new salary range.

Annual Focal Program

General Information

- Promotions
 - Any promotion to M6 or above requires completion of the VP promo template
 - Completed templates should be forwarded to corpcomp_us@oracle.com by COB October 14
- Sales scheduled pay progressions
 - OD pay progression increases scheduled for 12/1 **shouldn't** be included in the focal module
- Communication
 - **Do not** communicate recommendations until you receive notification from Corporate Compensation that approval has been obtained
 - Always check WC **before** communicating to ensure that recommendations have not changed

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Any promotion to M6 or above requires the completion of the VP promo template. This form can be found on the comp wiki. Completed templates should be forwarded to corpcomp_us@oracle.com by COB October 14.

OD scheduled pay progressions scheduled for 12/1 shouldn't be included in the focal module. Please monitor to be sure that these employees aren't also receiving a focal increase – the system won't allow for 2 increases on the same day.

Recommendations should not be communicated until approval has been received. This notification will come from Corporate Compensation. Also adjustments can sometimes happen during the approval process, so always check in Workforce Comp before communicating a recommendation.

Annual Focal Program

General Information

- Other

- Effective date of pay increase

- December 1 - Increase will be on the US December 15th check. Outside the US the increase will be on the next available pay check after December 1

- Access

- Be sure you have access to the compensation wiki and workforce compensation for the appropriate leader
 - Contact your compensation consultant if you don't have ask to the wiki
 - Follow the instructions on the wiki for access to workforce compensation

- H1B increases

- No December 1 increases
- If increase effective after 9/1 or processed after 9/1 new salary will not be reflected in the module
- If increase effective in November and employee receiving a focal increase – monitor to be sure both increases processed

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The effective date of the approved increases in the focal module will be December 1. The increase will be on the US December 15th paycheck. Outside the US the increase will be on the next available pay check after December 1.

Be sure you have access to the compensation wiki and workforce compensation for the appropriate leader. Contact your compensation consultant if you don't have access to the wiki. Follow the instructions on the wiki for access to workforce compensation.

There aren't any H1B increases effective 12/1 which will make the process easier than in some years. Please be aware that any H1B increase effective after 9/1 or processed after 9/1 will not show in the module. If a H1B increase is effective in November and the employee is also receiving a focal increase – monitor that both increases are processed appropriately.

Annual Focal Program

General Information

- Other (continued)
 - International Transfers
 - Manual adjustments may be needed if employee not in new country by September 1
 - Employee must be in the new country in HCM for manual adjustment to be done
 - Transaction Freeze
 - Effective immediately the CEO office will push back on all increases that aren't dive & saves or legally required increases (H1B, etc.)
 - Ranking Feature
 - Automatic ranking feature enabled for organizations wanting to use it
 - OFSS
 - Will have separate plans and budget but will be in the module
 - Delphi
 - Will **not** be in the module (originally this was communicated that they would be in the module – due to system issues)

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Manual adjustment will be needed for employees who weren't in their new country when the module data was cut. Once the employee shows in the new country in HCM we can adjust the module. Please watch for these employees during your validation.

Effective immediately the CEO office will push back on all increases that aren't dive & saves or legally required increases such as H1B increases.

There is an automatic ranking feature that is enabled in the module. Only limited organizations use this feature but it has been enabled.

OFSS employees are included in this program. They will have separate plans and budgets.

Delphi employees will not be included in the module as well. (Originally we expected these employees to be included in the module but there are system issues so these folks will be managed on spreadsheets.)

Annual Focal Program

General Information

- Other (continued)
 - All employees are required to be assigned a manager to show on a planning worksheet
 - LOAs
 - Employees on a **paid leave** of absence are eligible if all other eligibility criteria are met. Any approved salary increase will become effective upon the employee's return
 - Questions through out the process
 - Contact your compensation consultant

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All employees are required to be assigned to a manager to show on a planning worksheet. Watch for this during your data validation.

Employees on a paid leave of absence are eligible for this program if all other eligibility criteria are met. Any approved salary increase will become effective upon the employee's return from leave.

When you have questions during the program – please check the wiki for the latest information and if you still have a question, contact your US compensation consultant.

Annual Focal Program

Guidance for Managers Making Recommendations

- When making salary recommendations
 - Compare employee to other employees in the work group doing the same job with similar experience, skills and performance
 - Avoid using the “peanut butter” approach
 - When promoting employees, base salary increases typically can be [REDACTED] %
 - Base salaries should be appropriately placed in the new salary range
 - If proposing an increase greater than [REDACTED] consider giving a portion of the increase now and a portion later based on performance in the role

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When making salary increase recommendations a managers should compare an employee to other employees in the work group doing the same job with similar experience, skills and performance. A manager should be able to explain why employees are paid differently.

Giving the same amount/% of increase across the entire team should be avoided.

A typical promotion increase is usually [REDACTED]. However, the base salary should be appropriately placed in the new salary range. If you’re proposing an increase greater than [REDACTED] consider giving a portion of the increase now and a portion later based on the employee’s performance in the role.

Annual Focal Program

HR Manager Review Recommendations

- HR Managers Review
 - Review employee's with 1 or 2 ratings that are being proposed for an increase
 - Review employees under minimum with ratings of 3 or above
 - Review employees rated 4 or 5 with no increase proposed
 - Review employees with increases placing the employee over the max of the range
 - Review all increases over x%
 - Review all job changes and promotions
 - Complete JCRF for changes from OT eligible
 - Complete VP promo template for VP promos
 - Review increases less than ■

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As an HR manager, we recommend you review

Proposed increases for employees rated 1 or 2

Pay close attention to employees under minimum rated 3 or above.

Review employees rated 4 or 5 with no increase being proposed

Review increases that place the employee over the max of the range

Review all increases over x% (you can determine the threshold that makes sense for your organization).

Review job changes and promotions – are they appropriate – does the employee and scope of the job meet our leveling requirements. Have the required forms been completed.

Review salary increases less than ■ - salary increases should be meaningful.

Annual Focal Program

US Compensation Review

- US Comp Team Review
 - Review all JCRFs for job changes from OT eligible
 - Review proposed promotions to M6 and above
 - Review for general anomalies – too generous, below mins, etc.
 - Job Changes to job codes not used in the US

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The US Comp team will review

All job classification review forms for job changes from OT eligible to non-OT eligible

All proposed promotion to M6 and above

We'll also review the module for general anomalies – large increases – below minimum employees as well as for job changes to job codes not used in the US – Executive Assistant and Implementation Consultant 4.

Workforce Compensation

HR Validation



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This section shows you how to access and use Workforce Compensation for HR.

What is Workforce Compensation?

- Workforce Compensation (WC) is an Oracle Self Service Application for managing compensation processes, allowing you to:
 - Allocate, model and distribute budgets to subordinate managers
 - Rate employees (Compensation Rating only, not Talent Rating)
 - Make, Review and Submit Recommendations for employees
 - Review historical compensation information
 - View and download employee information for offline work or further analysis

Note: Firefox is the preferred browser for Workforce Compensation

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Workforce Compensation is an Oracle Self-Service Application for managing compensation processes. In the next several sections of our training, we will review the tasks that can be done in Workforce Comp.

First, we will start with your budget. The tool allows you to allocate, model, and distribute budgets to your organization. This will include determining if you will pass budget down to subordinate managers, reviewing how to build a budget model, applying a model, and publishing a budget.

After we explain how to work with your budget in Workforce Comp, we will give you instructions on how to download your worksheet to an Excel spreadsheet, in case you'd like to work offline.

Next, we will review how to Rate your employees. Please note that this is a Compensation rating only. It is not the official Talent Review rating.

Finally, we will show you how to make recommendations, review your subordinate managers' recommendations and, submit recommendations for your entire organization to your manager for approval.

You can also view historical compensation information and download employee information for further analysis.

- When working with Workforce Comp, remember that Firefox is the preferred browser.

Workforce Compensation

How to Access



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Now let's begin with access to Workforce Compensation.

How to Access Login

1. From MyOracle Employee Tools, click [redacted]
2. [redacted], select [redacted]
3. [redacted]
4. Log on with your SSO credentials

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To access Workforce Compensation from the my.oracle.com homepage, select the "[redacted]" link from the "[redacted]"

On the next screen, under [redacted], click [redacted].


At the Sign In screen, enter your Single Sign-On credentials.

How to Access
Navigate to Compensation

From the [REDACTED], select the **Compensation** icon

- HR and Compensation Admins will use the [REDACTED] link
- LOB Managers will use the [REDACTED] link under the [REDACTED]

NOTE: Your menu options may differ from what is shown here, depending on your Access level



The screenshot shows a navigation menu with a large black redaction box covering the right side. A green arrow points from the text 'HR and Compensation Admins will use the [REDACTED] link' to a link in the menu. A red arrow points from the text 'LOB Managers will use the [REDACTED] link under the [REDACTED]' to a sub-link under a parent link in the menu.

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Once logged into [REDACTED] select the “[REDACTED]” icon, which is the link that HR and Compensation will use. The “[REDACTED]” icon is what will be used by line managers.

Please note that your menu options may differ from what is shown here, depending on your Access level.

How to Access

1. Click [REDACTED]
2. Your name will appear in the Manager field. [REDACTED]
3. Enter the [REDACTED] and click [REDACTED]
4. Click the [REDACTED] in the [REDACTED]

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Once the [REDACTED], click on [REDACTED] to search [REDACTED] of, as shown in #1.

Your name [REDACTED]. Click on the [REDACTED] as shown in #2. The [REDACTED].

In step 3, enter the [REDACTED].

Next, click [REDACTED].

How to Access

Access Planning Worksheet

Click on either set of links to open the Planning Worksheet screen for the appropriate plan



Model Compensation

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Once the [REDACTED] the plans available to that manager will appear. Click on the [REDACTED]
[REDACTED].

How to Access

Select the desired Excel icon to begin your validation:



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Select

- The
- The This option requires the download and installation of and the could take a considerable amount of time. For instructions to , please see the

The . We **recommend** using the before downloading to Excel.

Workforce Compensation

Eligibility Review



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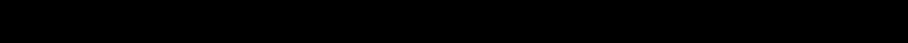
Next we will discuss the steps required during HR eligibility validation.

Eligibility Validation

Eligibility and Planning Worksheet

- Review the eligibility rules for the program.
 - **Eligibility Criteria:** Person Type, Country, Job, etc.
 - **Eligibility Status:** “Eligible” or “Ineligible”
 - If Ineligible, employee will **NOT** show on the Planning Worksheet
 - Exception: Ineligible Managers with Eligible Employees will show in the tool but cannot be planned
- Use the **Export to Excel** function to download a copy of the Manager Planning Worksheet

 Worksheet



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To begin your eligibility validation, start by reviewing the eligibility rules for the program, which can be found on the Workforce Compensation homepage and Compensation Wiki. The rules are different for Bonus, Equity and Focal programs.

For each program, there are specific criteria that must be met. For example:

- **Person Type:** Participants must be regular, Oracle employees. Contractors, students and temporary employees are typically not eligible.
- **Country:** Employees working in certain countries are not eligible.
- **Job:** Employees in certain Jobs and Career Levels are not eligible.

The Manager Plan will list only eligible employees. If an employee is ineligible, the employee will **NOT** be on the Planning Worksheet.

There is an exception: Ineligible Managers with Eligible Employees will show up in the tool but will be grayed out and cannot be planned.

To get all employees in your organization, you need to change the **Team** filter from **Direct Reports** to **All** and click the **Go** arrow.

Use the **Export to Excel** function to download a copy of the Manager Planning Worksheet to Excel.

Eligibility Validation

Eligibility Review Instructions

- Compare a Global Comp Detail Report to the WC Planning Worksheet, and note any employees that have eligibility issues
 - Be sure all **eligible** employees are listed
 - Identify email address for any missing employees who should be eligible
 - Note any employees who should be ineligible
 - Work with Regional Compensation to make manual eligibility changes
- Make sure **all employees are assigned a manager**
 - If not assigned to a valid manager, the employee will **NOT** show on the Manager Planning Worksheet

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Compare a global comp detail report to the Planning Worksheet you get from Workforce Comp:

- Confirm that all eligible employees are listed
- Identify email address for any missing employees who should be eligible
- Note any employees on the Planning Worksheet who should be ineligible
- Work with Regional Compensation to make any manual eligibility changes by exception

Make sure all employees are assigned a manager. Otherwise, the employee will **NOT** show on the Manager Planning Worksheet.

Workforce Compensation

Worksheet Manager Change



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This next section will show you how to change the Worksheet Manager for employees with missing or wrong managers.

Worksheet Manager Change

Administer Workers

- Use [redacted] if an employee's manager is [redacted]
 - If you are on the [redacted] page, click the [redacted]
 - If you are on the [redacted] page, click the [redacted] link above [redacted] and then click **Administer Workers**

CAUTION: Changing the manager during the Bonus or Salary Review processes **WILL** change the manager/LOB budget. Budgets will **NOT** change for the Equity process.

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If an employee's Manager [redacted], you can use the [redacted] task to make the correction.

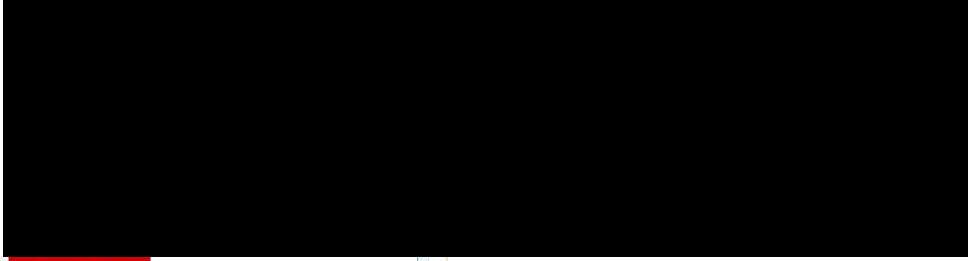
If you are on the [redacted], simply click on the [redacted] link. If you are on the [redacted] page, click [redacted] and then click on [redacted].

A word of **caution:** For Bonus and Focal plans, changing the manager **WILL** change the manager, and perhaps, the LOB budget. Budgets will **NOT** change if the manager is changed for the Equity plan.

Worksheet Manager Change

Change Worksheet Manager

1. Enter the [redacted] or [redacted] and click the [redacted] button
2. In the [redacted], click the [redacted] to open [redacted] page
3. In the [redacted] section, find the appropriate [redacted] link and click to open it



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Search for the [redacted] Click on the [redacted] in the [redacted]. This opens a new [redacted] section. Click on the appropriate plan link.

Worksheet Manager Change

Change Worksheet Manager cont.

5. In the [redacted] section, the [redacted] is displayed

6. Click the [redacted] and [redacted] for the [redacted] to receive the [redacted]

7. Select the [redacted] to start the [redacted] process



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The task opens on the [redacted]. Click on the [redacted] tab to find the [redacted] section.

The [redacted] is displayed. Use the [redacted]. Select the [redacted] to start the [redacted] process.

Worksheet Manager Change

Change Worksheet Manager cont.

8. If the employee is a **manager**, you will be asked how to handle subordinates. The [redacted] is [redacted]

- [redacted]



If the employee is also a manager, a [redacted] The [redacted]
[redacted]. Use this option [redacted] the employee [redacted].

Worksheet Manager Change

Change Worksheet Manager cont.

9. If you want to move the [redacted], select [redacted].

Select [redacted] and enter [redacted] as needed. Click [redacted].

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If you want to move the [redacted], select [redacted]. In this case, only the [redacted] will be moved to the [redacted], and all [redacted] under that [redacted] will be assigned to the [redacted], effectively staying in the current organization.

Worksheet Manager Change

Change Worksheet Manager cont.

10. Your [redacted] will appear in the [redacted] field along with the [redacted] you entered the [redacted]
11. The [redacted] appears in the [redacted] field
[redacted]
12. Click the [redacted] button (upper right hand corner) to complete the [redacted]
13. Check the [redacted] to verify your change

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Your [redacted] will appear in the [redacted] field along with the [redacted] in which you entered the [redacted]

The [redacted] prevents the [redacted] from correctly adjusting as defined by the [redacted] Please make sure to [redacted] the [redacted].

To complete the [redacted] click either the [redacted]

Finally, check the [redacted] and [redacted] worksheets to verify your change.

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Manager Planning



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This next section introduces you to Workforce Compensation and explains how to access and use the tool as a manager.

Workforce Compensation

Landing Page – Tasks and Plans/Pools

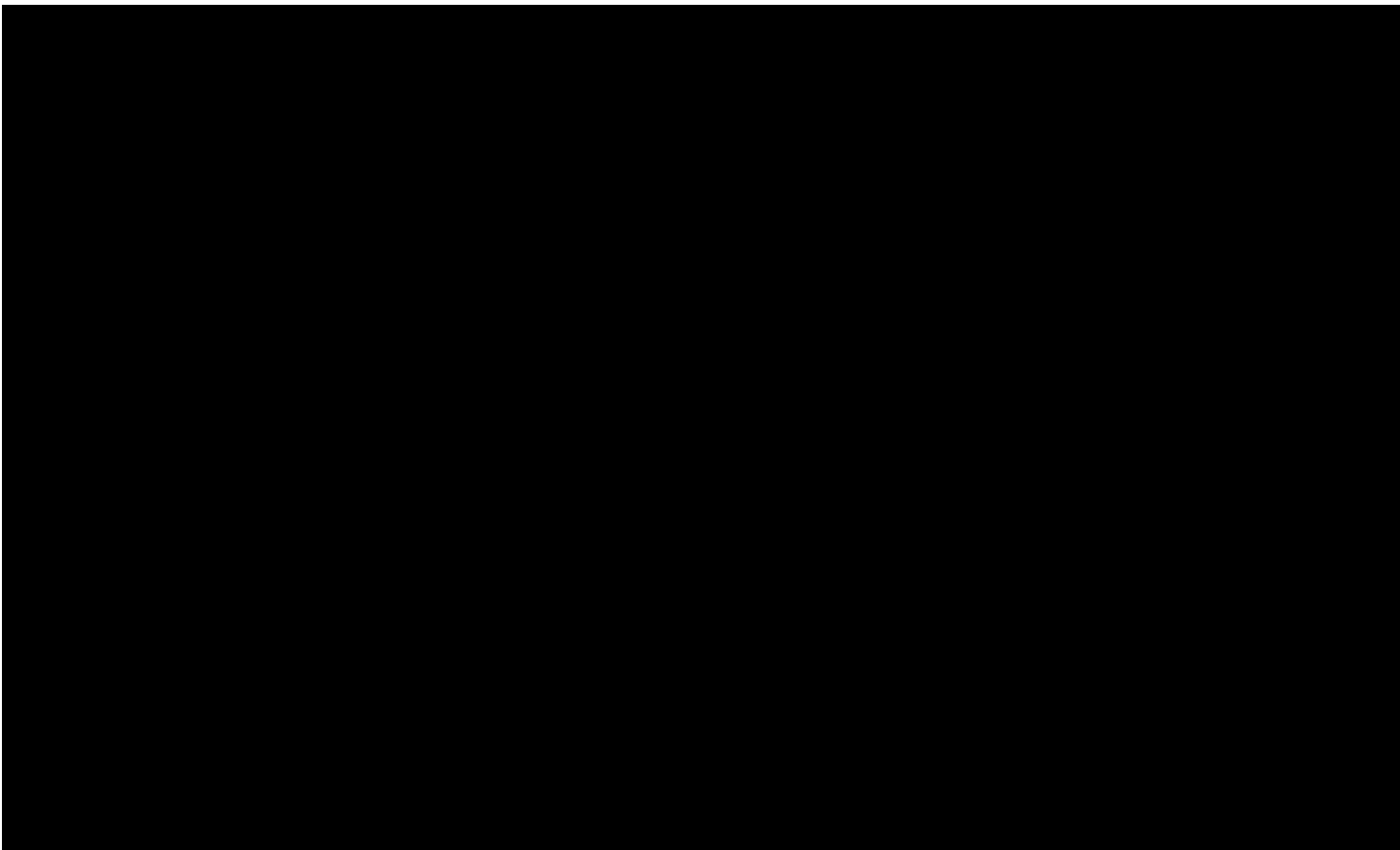


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The Workforce Compensation landing page has 2 sections:



Workforce Compensation

Budget Allocation



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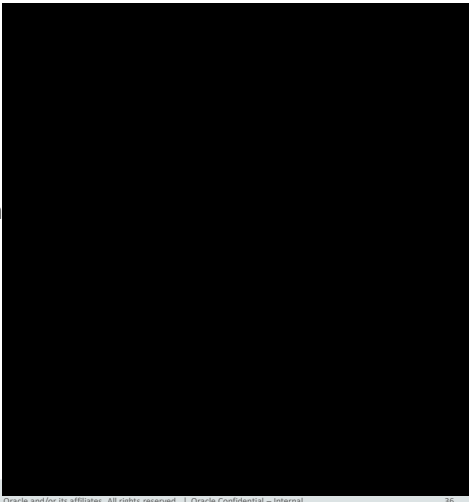
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Now let's begin with budget allocation.

Budget Allocation

- Go to [redacted] and click either link for the budget pool worksheet
- The **initial** time the budget is selected, you must choose a [redacted]. Your selection will affect the [redacted] of [redacted]
- Selecting the [redacted] option allows you to adjust the [redacted] if desired



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To allocate a budget, click on the "[redacted]" header under "[redacted]". Then click either the [redacted] under the "[redacted]" Header or under the [redacted] to take you to the budget pool worksheet. These 2 options are indicated by the red arrows.

The first time you go in to the "[redacted]" section you will be asked to choose a [redacted]. This step is very important - it will determine the [redacted].

The [redacted] options are:

[redacted]

All your subordinate managers will be set to [redacted] for the budget worksheet. Choose this options if you will hold all the budget at your level.

[redacted]

Select this option to pass down budgets to your direct report managers. Your direct report managers will have [redacted] and will be able to choose how to distribute their budget within their own organization. You can [redacted] within the budget worksheet.

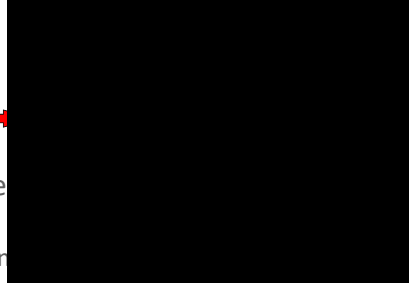
[redacted]

Select this option if you decide to pass down budgets to **all** subordinate managers. **All** subordinate managers will have [redacted] access, but [redacted]. You [redacted] within the budget worksheet.

Selecting the [redacted] option will allow you to [redacted] of subordinate managers if needed.

Budget Allocation

- Enter budget amounts in the column [REDACTED]
 - The [REDACTED] row is the budget for **recommendations to your direct reports**
- You must [REDACTED] the Budgets so subordinate managers can see their budgets
 - Click the [REDACTED] arrow next to the [REDACTED] icon & select [REDACTED]
 - If [REDACTED] budgets to only a few managers, highlight [REDACTED] and use “[REDACTED]”



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The budget can be distributed to subordinate managers manually by [REDACTED] column as indicated by the red box.

The [REDACTED] row is the budget for you to give recommendations to your direct reports.

You must [REDACTED] budgets for subordinate managers to see a budget on their worksheet. To [REDACTED] your budget, click the drop-down arrow next to the “[REDACTED]” icon and select [REDACTED]. You can choose to [REDACTED].

Workforce Compensation

Budget Modeling



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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
 - Managers who intend to make the allocations themselves (hold the entire budget)
 - Different models can be created, previewed and applied **before** publishing the budget

NOTES:

- Applying a model will **overwrite** any previously entered recommendation amounts
- Models should **never** be applied **after the budget has been published**

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

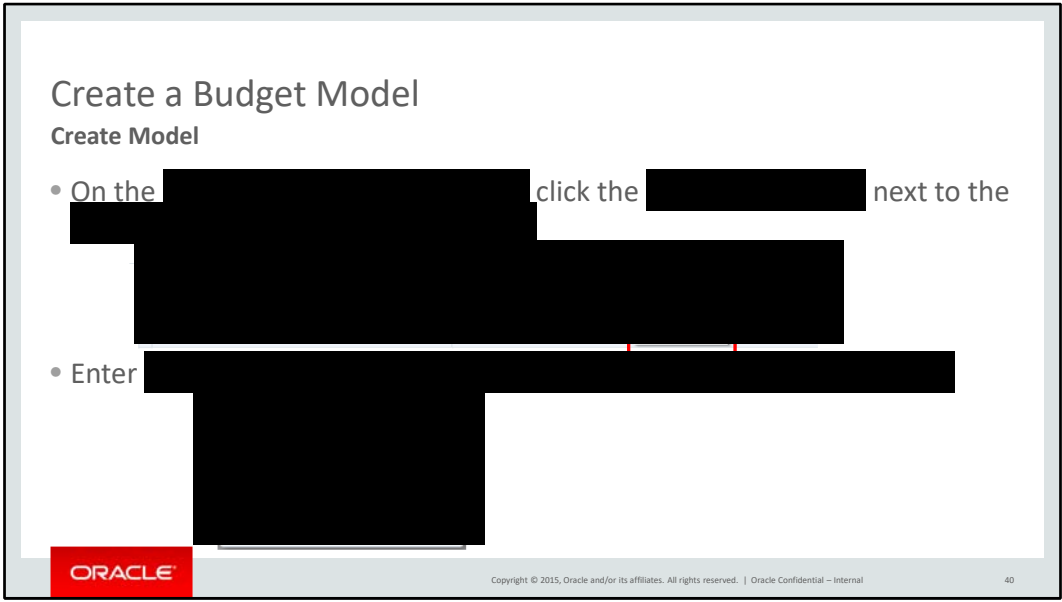
Different models can be created, previewed and applied. Your modeling should be completed before you publish a budget.

Remember, applying a model will overwrite any previously entered recommendation amounts. More importantly, models should never be applied after the budget has been published.

Create a Budget Model

Create Model

- On the [redacted] click the [redacted] next to the [redacted]
- Enter [redacted]

The image shows a screenshot of a software interface titled "Create a Budget Model". Under the sub-heading "Create Model", there are two bullet points. The first bullet point says "On the [redacted] click the [redacted] next to the [redacted]". The second bullet point says "Enter [redacted]". The interface includes the Oracle logo in the bottom left corner and a footer with the text "Copyright © 2015, Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal" and the number "40" on the right.

To create a budget model, click the "[redacted]" icon drop-down on the budget worksheet, select "[redacted]"

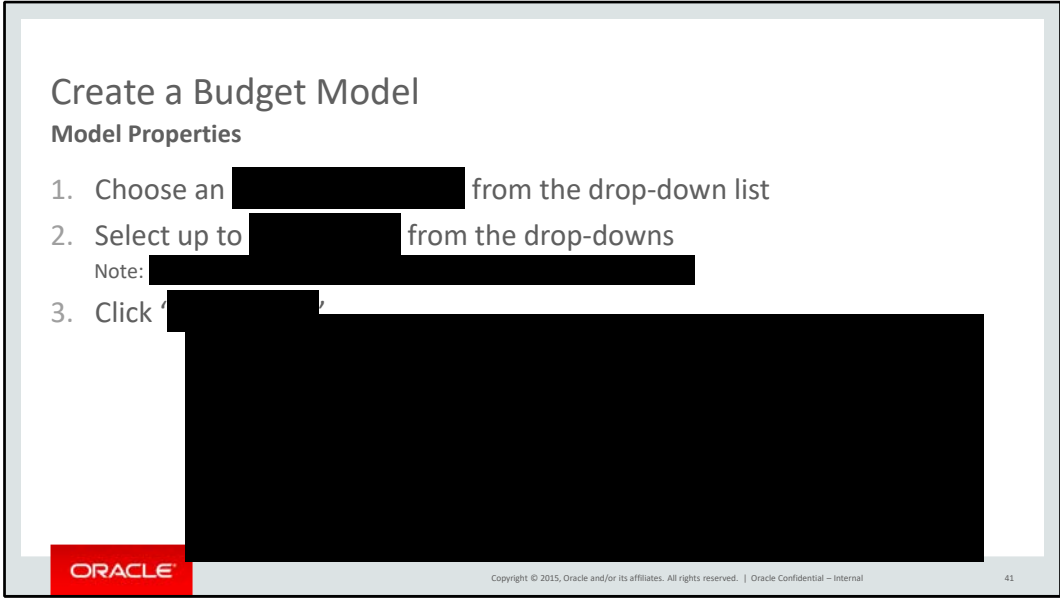
Enter a model name – choose one that is meaningful to you.

The "[redacted]" will default to values determined by the plan administrator. Click "[redacted]"

Create a Budget Model

Model Properties

1. Choose an [REDACTED] from the drop-down list
2. Select up to [REDACTED] from the drop-downs
Note: [REDACTED]
3. Click "[REDACTED]"



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Under the [REDACTED] section, choose an [REDACTED] indicated by (1).

Under the [REDACTED] section, enter up to [REDACTED] for the model. Use the [REDACTED] to made your choices. The [REDACTED]. The [REDACTED] will appear after a [REDACTED] is entered and the [REDACTED] field will appear after the [REDACTED] field is entered.

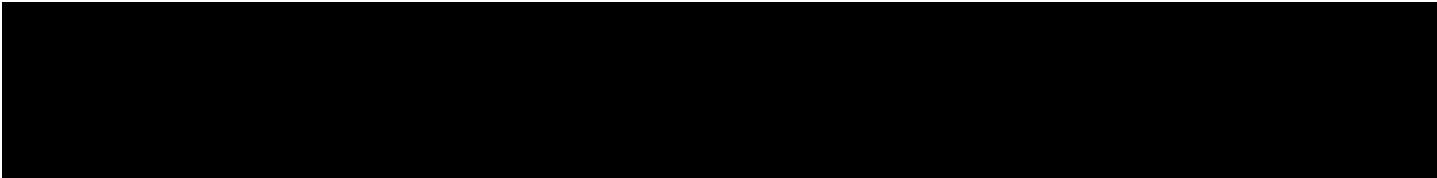
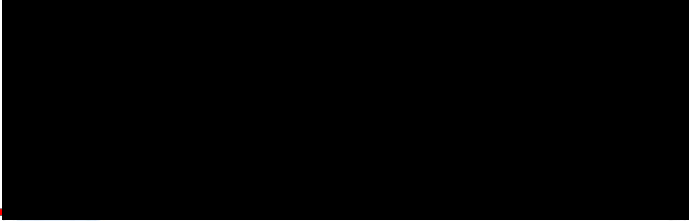
When finished, click "[REDACTED]".

Create a Budget Model

Model Details

- Enter amounts in the [REDACTED] section to calculate and build the budget accordingly
 - Click the [REDACTED]
 - Use the inner scroll bar to view the entire list

Click 'Preview Model Results'



Create a Budget Model

Preview Model Results

- The [REDACTED] displays the [REDACTED]
- Two other tabs:



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On the “[REDACTED]” screen:

The [REDACTED] is shown in the [REDACTED] section.

There are [REDACTED] on this screen – [REDACTED] which is the [REDACTED].

Create a Budget Model

- Click [redacted] to return to the [redacted]
[redacted]
- [redacted]
 - If you have [redacted] you can [redacted]
[redacted]
 - Click the [redacted] button
 - Choose [redacted] from the [redacted]
 - [redacted] and confirm the [redacted]
[redacted]

Click **Return to Model** to return to the model to make changes.

Models should never be applied after the budget has been published

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Click “[redacted]” to return to the [redacted] landing page or “[redacted]” to go back to the [redacted].

If you have not [redacted], you can [redacted]. Click the “[redacted]” from [redacted].

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

Workforce Compensation

Excel Export



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Next, we will give you instructions on how to export your worksheet to Excel if you choose to work offline.

Excel Export

- [REDACTED] is a two-way process for [REDACTED], which requires:
 - Download and installation of [REDACTED]
 - Configuration of Excel
- For detailed instructions, please refer to the “[REDACTED]” posted on the [REDACTED]

NOTE: You must download and install the latest version of [REDACTED], which became available on [REDACTED]. Please uninstall any old versions and install the new version.

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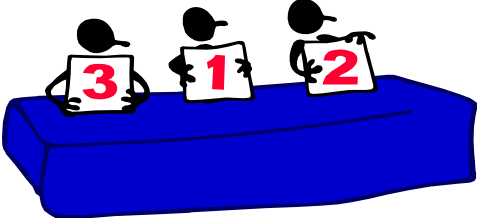
You may complete planning for your employees in the [REDACTED] or you can choose to [REDACTED].

The [REDACTED] is a two-way process that allows you to [REDACTED], make recommendations and [REDACTED], if you choose.

To use this feature, you must download and install the latest version of [REDACTED] and configure Excel. If you have a version prior to [REDACTED], you must uninstall the old version before installing the new version. For detailed instructions on how to download and install [REDACTED] please reference the Word file posted on the [REDACTED] website.

Workforce Compensation

Rate Employees



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The next section will show you how to enter ratings.

Rate Employees

- From the [REDACTED], click either link to open the worksheet for the [REDACTED]
- On the [REDACTED] Rating column
- Use the [REDACTED]

[REDACTED]

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To rate your employees, from the [REDACTED], click the [REDACTED] either under "[REDACTED]" or under "[REDACTED]".

On the [REDACTED].

Use the [REDACTED]

Always **Save** any entry you make.

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

Workforce Compensation

Make Recommendations



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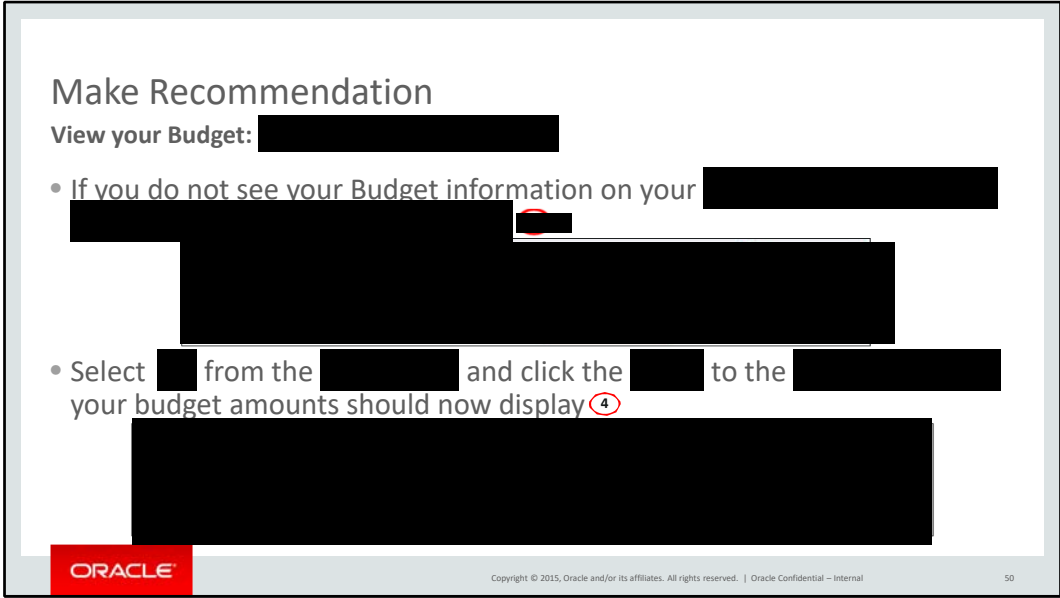
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This section shows you how to make recommendations for employees.

Make Recommendation

View your Budget: [REDACTED]

- If you do not see your Budget information on your [REDACTED]
[REDACTED] [REDACTED]
- Select [REDACTED] from the [REDACTED] and click the [REDACTED] to the [REDACTED]
your budget amounts should now display 4



The screenshot shows a user interface with a title 'Make Recommendation' and a section 'View your Budget:'. Below this, there are two bullet points. The first bullet point is partially obscured by a large redaction box. The second bullet point describes a step: 'Select [REDACTED] from the [REDACTED] and click the [REDACTED] to the [REDACTED] your budget amounts should now display 4'. The number '4' is circled in red. At the bottom left is the Oracle logo, and at the bottom center is the text 'Copyright © 2015, Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal'. The page number '50' is at the bottom right.

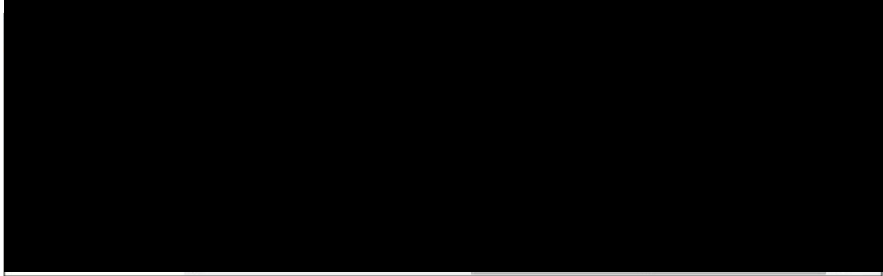
There are two ways to view your budget. [REDACTED]
[REDACTED].

If the [REDACTED] shows “[REDACTED]” as indicated by (2), you will not see your budget as indicated by the red box 1. Select “[REDACTED]” from the [REDACTED] and click the [REDACTED] as indicated by (3). After clicking the [REDACTED] your budget amounts should now display.

Make Recommendation

View your Budget: Option 2 – [REDACTED]

- Another way to view your budget is from the Approvals tab. Click the [REDACTED] link to see the budget information.



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Another way to view your budget is from the [REDACTED] tab. Click the “[REDACTED]” tab to view your budget information on the right.

This is the recommended option.


Make Recommendation

Entering Recommendations: Option 1 - [REDACTED]

- Enter job changes in the [REDACTED] and [REDACTED] columns
- For non-sales, enter salary changes in the [REDACTED] columns. The other column will auto-calculate
- For sales, enter salary and ATV changes in the [REDACTED]

[REDACTED]

WARNING!
DO NOT SUBMIT until **ALL** your subordinate managers have submitted their worksheets to you. Your submitta [REDACTED].

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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.

You also have two methods to enter recommendations for employees. The first option is to enter recommendations [REDACTED]. You will make salary recommendations as either an increase AMOUNT in local currency or a percentage of eligible salary. For sales employees, you also have the option to enter an ATV increase amount. Additionally, you could propose a job change and/or discretionary title change on this screen as well. Employees not eligible for a particular compensation component will have that column grayed out.

After making entries, please remember to save your work.

Please do **not** submit your 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.

Make Recommendation

Entering Recommendations: Option 2a – [REDACTED]

- [REDACTED]
- Click "[REDACTED]" on the [REDACTED]. You will [REDACTED]
- If your [REDACTED]
- A successfully downloaded file will [REDACTED]
- Verify the [REDACTED] columns have no background color and recommendations can be entered.

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The second option is to export to [REDACTED] and [REDACTED]
[REDACTED]

- To do this, click the [REDACTED] icon to start the [REDACTED] process.
[REDACTED] [REDACTED] Then log in using your [REDACTED].
- If your [REDACTED]
- A successful download will have [REDACTED] and active "[REDACTED]" and "[REDACTED]" buttons.
- Verify the [REDACTED] and [REDACTED] recommendations can be entered.

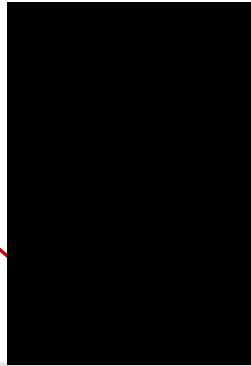
Please note: In the tool, you can plan salary increases by amount or percentage, and employees are grayed out if they are ineligible for a compensation component. In this option, all fields are editable for all employees, but if the employee is ineligible for a particular compensation component, the amount entered will not upload into the tool.

Make Recommendation

Entering Recommendations: Option 2b – [REDACTED]

NOTE: If you are [REDACTED]

- In [REDACTED]
 - Click the [REDACTED] button and click [REDACTED] to select the default [REDACTED]
 - The [REDACTED] will process
 - [REDACTED] is complete when you see the [REDACTED] that says [REDACTED]
 - Click [REDACTED] and [REDACTED] to column [REDACTED] to verify the rows updated successfully
- In WC:
 - Click the [REDACTED] link to refresh the [REDACTED] and verify your changes were [REDACTED]



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Once manager recommendations are complete [REDACTED], you will need to [REDACTED].

In [REDACTED]

- Click the “[REDACTED]” button and click “[REDACTED]” for the default [REDACTED].
- The [REDACTED] will process and when it is finished you will see the “[REDACTED]” that says “[REDACTED]”.
- Click “[REDACTED]” and scroll to column [REDACTED] in the [REDACTED] to verify the [REDACTED] successfully.

In [REDACTED] click the [REDACTED] link to refresh the [REDACTED] and verify your changes were [REDACTED].

**Workforce
Compensation**
Review, Approve and Submit



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In this section, we will cover how to review, approve and submit your recommendations.

Review, Approve and Submit

Review: Return for Correction or Request Information

If subordinate managers need to make corrections or you need more information before approving, highlight the [REDACTED] and click [REDACTED] or [REDACTED], respectively

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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 “[REDACTED]” or “[REDACTED]” and type in your comments in the pop-up box.

Review, Approve and Submit

Review: Worksheet Status

- On the [REDACTED] tab, you can see your Approval Status and the Status of your subordinate managers: [REDACTED]
- Click the [REDACTED] or [REDACTED] icons for more information [REDACTED]

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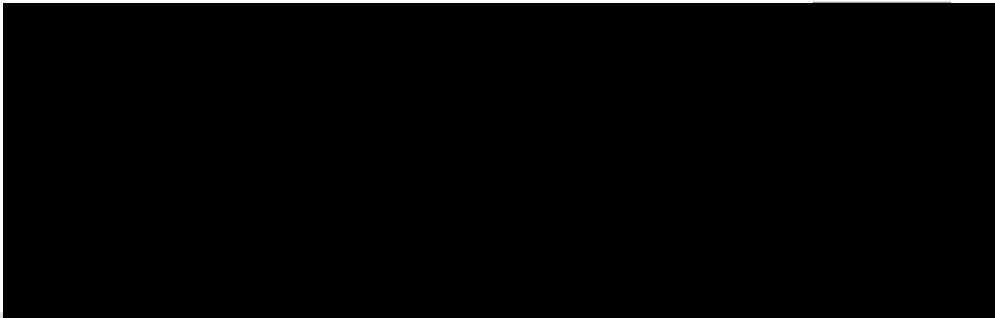
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You can review the status of your subordinate managers from the [REDACTED] tab.

Review, Approve and Submit

Approve

- Approve your subordinate managers' submissions via the [REDACTED] tab. Click the [REDACTED] to the [REDACTED] and make a selection:



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Use the [REDACTED] tab to approve your subordinate managers' submissions, either individually or all at once by clicking the [REDACTED].

To approve selected managers, select a [REDACTED] or use the [REDACTED], then choose "[REDACTED]".

Choosing "[REDACTED]" will approve your entire hierarchy.

After approving, you can verify your approval in the [REDACTED] column.

Review, Approve and Submit

Submit: Option 1 – [REDACTED]

- On the [REDACTED] click the [REDACTED] button in the upper right corner



NOTE: When you [REDACTED]

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

The first option is on the [REDACTED], click the “[REDACTED]” button in the [REDACTED].

Review, Approve and Submit

Submit: [REDACTED]

- On the Compensation Workforce [REDACTED]

At this point you are finished with the process

Do not communicate recommendations until you receive notification from Corporate Compensation that approval has been obtained

Always **verify** in Workforce Compensation before you communicate to employees to ensure that the final recommendations have not changed

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The second way to submit for approval is on the [REDACTED]

You have now finished the recommendation process.

Please remember not to communicate any recommendations until you receive notification from Corporate Compensation through your manager or HR manager.

Also adjustments can sometimes happen during the approval process, so always check in Workforce Comp before communicating a recommendation.

Workforce Compensation

Tips and Resources



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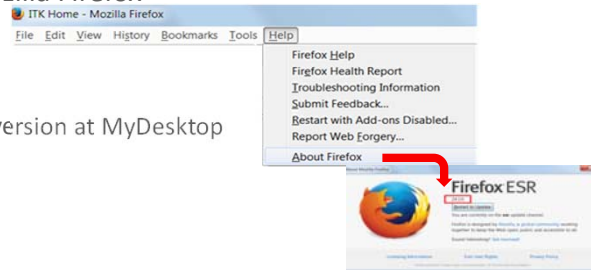
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In this last section, we will share some helpful tips when using the Workforce Compensation tool and resources to help answer your questions.

Workforce Comp Tips

Browsers

- 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



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As mentioned earlier, Firefox is the preferred browser. Be sure to use the latest version of Firefox, which can be determined by following the instructions on this slide. If needed, download the latest browser from “MyDesktop.”

You may also use Chrome or IE as well.

Workforce Comp Tips

Collapsible Panes and Expand Arrows

To see more fields without scrolling or if the Team filter is not visible:



1. To gain more work space, click on the left-pointing arrow to collapse the Tasks pane.
2. To show hidden filters, 



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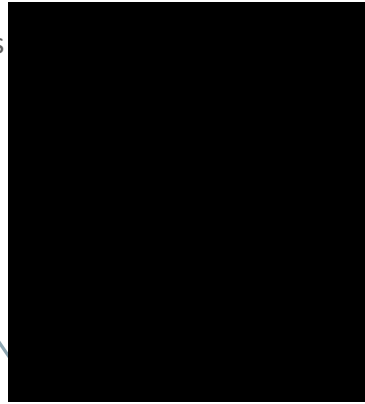
As you use the tool, you may find you need more space on your screen. You can achieve this by collapsing the “ pane by clicking the  – indicated by the red circle with the number 1 on this slide.

If your screen is small, you may also find that certain Worksheet filters are not visible, such as the “Team” filter. You can expand the hidden filters by clicking on the double right-pointing arrows – indicated by the red circle with the number 2 as shown here.

Workforce Comp Tips

Nested Scroll Bars

- Workforce Compensation 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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Workforce Compensation uses nested scroll bars. You may need to use the vertical scroll bar to reveal the horizontal scroll bar at the bottom of the page. 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.

Workforce Comp Resources

Check and Add APS Entitlement

All managers of people must have the
Oracle HCM Talent Line Manager
APS Privilege to use Workforce Compensation
This role is automatically assigned

If your manager is experiencing access issues or getting error messages when trying to perform manager actions, **the auto-assign may have failed.**

Check the manager's APS Entitlement to ensure they have the Oracle HCM Talent Line Manager role. Instructions can be found in the embedded document: "How to Check and Add OIM APS Entitlements.docx"



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All people managers will be automatically assigned the **Oracle HCM Talent Line Manager** role to use Workforce Compensation. If a manager is experiencing access issues, please use the embedded instructions to check their OIM APS entitlement or download the Workforce Compensation access instructions from the wiki. If the Oracle HCM Talent Line Manager role is not listed, please add it.

Workforce Comp Resources

Questions

- About the timeline
 - The corporate timeline is posted on the Compensation Wiki
 - Please answer manager questions related to LOB timelines
- About eligibility
 - Please review the eligibility document and work with your managers to try to determine the reason that an employee is ineligible
 - If you still have questions, please direct them to your regional compensation contact
- About Workforce Compensation access and functionality
 - Submit MyHelp - Compensation ticket:



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As we discussed earlier, the corporate timeline is posted on the Compensation Wiki. Please address any questions related to LOB timelines.

The eligibility document is available on both the Comp Wiki and Workforce Comp website, please work with your managers to determine the reason an employee is ineligible.

Submit questions on WC access and functionality to MyHelp - Compensation at the url listed.

Workforce Comp Resources

Useful Websites

Compensation Wiki: For the latest program news, HR Training Materials, Access Instructions and program Calendars and Information



Workforce Compensation Website: For the Manager Training Slides, Manager User Guide, OTube Videos, Quick Reference Guides and Helpful Hints, ADFdi Installation Instructions, Eligibility document and FAQs



This training and any additional HR-specific information will be posted on the Compensation Wiki.

The manager training, user guide, link to OTube videos and quick reference guides, and eligibility document are all available on the Workforce Compensation website.

Annual Focal Process

Next Steps



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Let's recap quickly the next steps for HR.

Next Steps

- Review Eligibility
 - Eligibility Exceptions: Work with Regional Compensation to update these employees manually in the Administer Workers task
 - Manager Changes: Use the Administer Workers task, Status and Hierarchy tab to make changes for missing and incorrect managers
- Review Workforce Compensation functionality
 - Review the training and resources available on the Workforce Compensation website, including OTube videos and reference guides
- Schedule manager training, if necessary

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One of the most critical tasks for you in this process is the validation of eligibility:

- If there are eligibility exceptions, you will need to have Region Compensation update this manually in the Administer Workers task
- If manager changes are required, you as HR, will need to update this in the Administer Workers task, under the Status and Hierarchy tab

Also, please take the time to familiarize yourself with the functionality of Workforce Compensation and schedule manager trainings, as appropriate.

Questions



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This concludes our training on how to use Workforce Compensation.
Let's go ahead and open it up for any questions.

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