

Global Corporate Bonus Process and Fusion Workforce Compensation

HR Training

Lisa Gordon
Senior Manager
Corporate Compensation
June 2014

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

1

Agenda

- 1 Tentative Timeline
- 2 What's new this year - CWB vs FWC
- 3 General Process Info
- 4 HR only - Fusion Navigation
 - FWC Access
 - Data validation
 - Excel Report
 - Eligibility Review Instructions
 - Changing Worksheet Manager
- 5 Fusion Tips

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

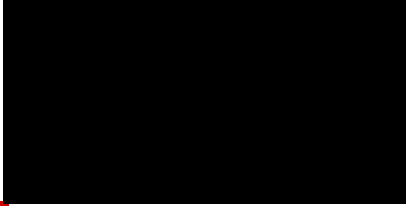
2

Today we will be reviewing what's changing this year in the process, a timeline for the process, and general process info. We will also present the functionality of Fusion Workforce Compensation. The functionality portion will include the functionality you may need as a member of the HR team.

Global Corporate Bonus Process

Tentative Timeline

- Decision will not be made on bonus funding until after the FY14 earnings announcement during the 3rd week of June
 - We will prepare the module and be ready to start the process if funded
- **Tentative calendar:**



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

3

The Bonus process will be kicked off the 1st week of June in order to be prepared to open the module if budget approved at the time of the fiscal year earnings announcement during the 3rd week of June.

The reason for starting the training process for HR before the earnings announcement is that the eligibility validation in Fusion Workforce Compensation is different than the process for CWB.

The validation process as you can see is scheduled to start June 5.

Global Corporate Bonus Process

What's New - CWB vs FW

- Using Compensation Workbench (CWB) and Fusion Workforce Compensation (FWC) for the Bonus process
- Several organizations will be part of a **FWC pilot**
 - Product Development – all employees under Thomas Kurian
 - Selected groups under Safra Catz:
 - Carol Kelly
 - Corey West
 - Eric Ball
 - Greg Hilbrich
 - Ivgen Guner
 - Loren Mahon
 - Scott Rae
 - HR for Finance may have LOBs in both CWB and FWC
 - OFSS employees in the pilot organizations will be included in FWC
- All other organizations will use CWB

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

4

For the Bonus cycle this year we will be doing a pilot in Fusion Workforce Compensation. Several organizations will be part of the pilot. 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 will enter their bonus recommendations in FWC.

OFSS employees in the pilot organizations will be included in FWC. For Finance there are [REDACTED] [REDACTED] For Product Development the OFSS employees have recently become Oracle employees and will pull in to FWC. We will double check these [REDACTED] employees and may need to adjust their eligible salaries similar to an international transfer.

All other organizations will enter their bonus recommendations as usual in Compensation Workbench (CWB).

Depending on the organizations you support, you may be validating eligibility and assisting managers in **both tools**. Hopefully there will be minimal transfers between groups where one group is using CWB and the other is using FWC but any of these moves will need to be coordinated carefully.

Global Corporate Bonus Process

General Info

- **Timelines**

- Each LOB may establish their own internal timeline for the process that ensures Executive review and approval before the Corporate submission date

- **Budgets**

- Budgets are set at the top Executive level for each organization. In the past, each LOB head has been able 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

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

5

On an earlier slide the corporate timeline was discussed. LOBs may establish their own timeline that allows for review and approval by the organization leaders before the final submission.

Budgets are published to the top executive level of the organization. In the past, each LOB leader has been able to determine the method of cascading budgets in their organization. We expect the process to be the same this year but will let you know if anything changes.

FWC does have a modeling feature similar to the budget wizard in CWB to assist managers in pushing down budgets which we will review later in the presentation.

Global Corporate Bonus Process

General Info

• Communication

- **Do not** communicate a bonus amount until you receive notification from Corporate Compensation that final approval has been received
- Always check FWC **before** communicating to ensure that the bonus amounts haven't changed

• Eligibility

- Review the eligibility document posted on the Fusion Workforce Compensation homepage (url) and Compensation Wiki
- Be sure the employee population for your organizations are correctly reflected on the FWC worksheet
 - Not all employees are eligible for the Global Corporate Bonus

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

6

Remember that bonus amounts should not be communicated until final approval has been received. Also amounts can sometimes be adjusted during the approval process so always check in FWC (or CWB) before communicating a bonus.

Please review the eligibility document for the process this year. There are 2 key changes to previous years' eligibility:

OT eligible employees in LAD and eligibility for FY14 M & A's.

HR Information: Working in FWC



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

7

How to Access FWC

APS Request and Area of Responsibility Access

- Two part Process:

- You submit an APS request for the [REDACTED] role
 - The APS Justification section **must** include the **email of the manager whose hierarchy** you support or the name of the **country** you support
 - APS requests must go through the approval process; don't delay in submitting your request
- HRIS uses the Justification information from the approved APS request to enter your access in the Area of Responsibility (AoR)
 - Without an AoR entry, you will have the Compensation *link* but no access to a manager's hierarchy or a country

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

8

FWC access is a **two part process**.

First Part– Submit your APS request for the [REDACTED] role. This role gives you the **ability** to access a manager's hierarchy or a country but it does not provide the actual access to a hierarchy or country.

- **Do not** expect your access to be immediately processed! All APS requests must go to your manager for approval and then to the GPO (Global Process Owner) for approval. Be sure to allow sufficient time for the approval process; submit your APS request in advance of when you will need it.

As noted above, the APS role by itself is not very useful. You must also have access to either a manager's hierarchy or a country.

Second Part – The actual access (to a manager's hierarchy or a country) is granted through an Area of Responsibility (AoR) entry by the HRIS team.

- When you submit your initial APS request, in the Justification area you enter your reason for requesting the role **and** the email address for the manager whose hierarchy you support, or, if you support a geographical region, the name of the country (or countries) you support.
- This information is used by HRIS for the **Area of Responsibility (AoR)** entry which will grant your access to the hierarchy or country.

Notes to Lisa: *Country information should only be submitted by HR users who support an entire country. AoR cannot restrict access using a combination of mgr and country, such as only Fisher's employees in Ireland.*

Email address is to ensure we create access for the right mgr.

How to Access FWC – HR & Compensation



3. Log on using your SSO credentials

Sign In
Enter your Single Sign-On user name and password.

Username

Password 

[Lost your password?](#)

Note: Firefox is the preferred browser for Fusion applications



Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

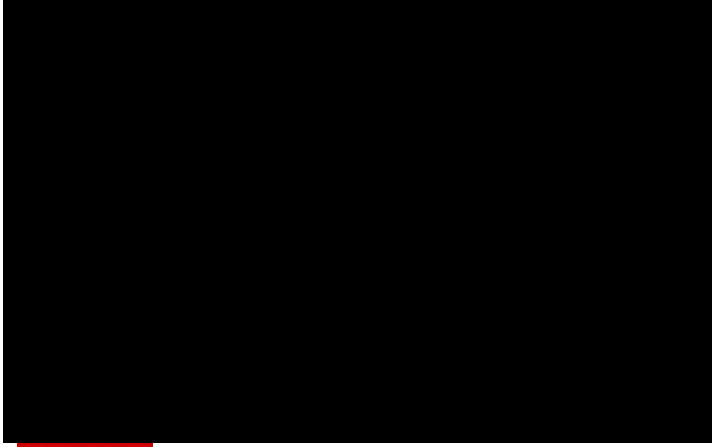
9

To access FWC from the my.oracle.com homepage, select the [redacted]

On the next screen, click the [redacted]

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

How to Access FWC



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential - Internal

10

How to Access FWC Proxy Manager

1. Click the [redacted] link [redacted]

2. Your name will appear in the [redacted] field
Click the [redacted] and click [redacted]

3. Enter the [redacted]
[redacted] and click [redacted]

4. Click the [redacted] in
the [redacted]

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential - Internal

11

How to Access FWC

Access Validation Worksheet / [REDACTED]

5. Click the link for the [REDACTED]
[REDACTED] to open the Worksheet

6. Click [REDACTED] icon to [REDACTED] and begin your validation

Important Note: Before you can use the [REDACTED] feature, you must have the [REDACTED] installed on your computer

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

12

How to Access FWC

Download and Install the [REDACTED]

Each year, before using the [REDACTED], you must **download and install the [REDACTED]**. This will ensure you have the latest [REDACTED] version.

1. Go to [REDACTED]
Click the link and download the .exe file to your desktop.
2. Double click the [REDACTED] file to install the [REDACTED]
3. Go to your computer's Control Panel > Programs and Features page and verify the [REDACTED] has been installed

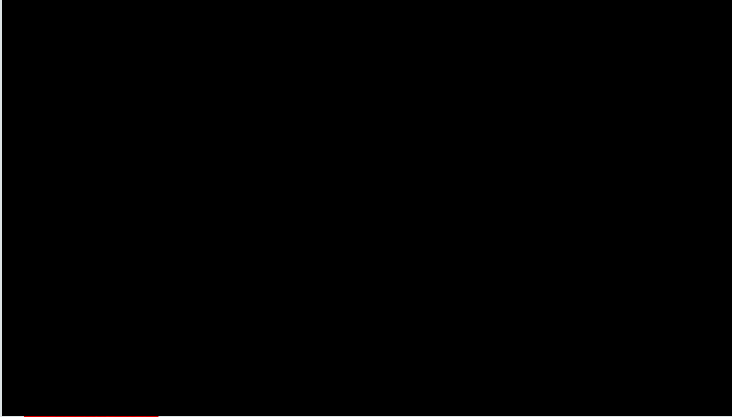
ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

13

Configure [REDACTED] when using [REDACTED]

After installing the [REDACTED], verify the [REDACTED] is active in [REDACTED]



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

14

How to Access FWC

Access Validation Worksheet / [REDACTED]

After [REDACTED] -



FWC Data Validation

Data Review Instructions

- After you have obtained a validation spreadsheet from FWC
[REDACTED]
- Compare an employee data download for your organization to the data validation worksheet
 - Be sure that all employees are listed
 - Note data for any missing employees; enter comments & data as stated above
- Review the eligibility rules for the Global Corporate Bonus program
These rules are different than for the Stock and Focal programs
[REDACTED]

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

16

These are basic instructions to help you validate that the Bonus Module will load the correct employees and information. Please review these instructions carefully. Issues should be forwarded to Lisa Gordon by COB June 18.

FWC Data Validation

Data Review Instructions (cont'd)

- Review the eligibility rules for the Global Corporate Bonus program (cont.)



- Send your spreadsheet with any issues to **Lisa Gordon** by **June 18**

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

17

FWC Worksheet Manager

Change Worksheet Manager

Use [redacted] if an employee's Manager in the Compensate Worker Worksheet is incorrect

- If you are on the [redacted], click the [redacted] link

- If you are on the [redacted] link above Tasks and then click [redacted]

**Caution: Changing the manager will change the manager's budget.
It could also change the LOB budget**

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential - Internal

18

FWC Worksheet Manager

Change Worksheet Manager



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential - Internal

19

FWC Worksheet Manager

Change Worksheet Manager

4. Click the [redacted] tab
[redacted]
5. In the [redacted] section, the current [redacted] is displayed
[redacted]
6. Click the [redacted] and search for the manager to receive the worker
[redacted]
7. Double click the [redacted] or click [redacted] to start the reassign process
[redacted]



FWC Worksheet Manager

Change Worksheet Manager

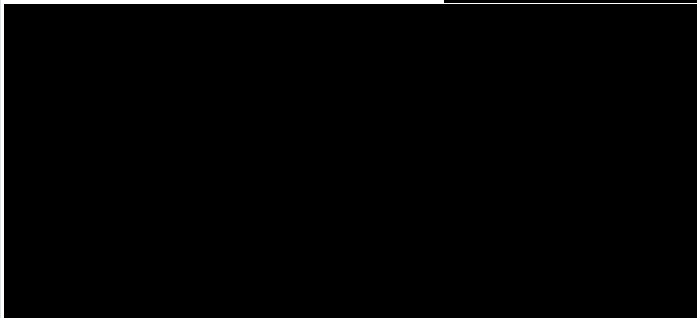
8. The default selection is [REDACTED]. If the worker is also a manager, this option will reassign the worker but, his subordinates will be assigned [REDACTED].



FWC Worksheet Manager

Change Worksheet Manager

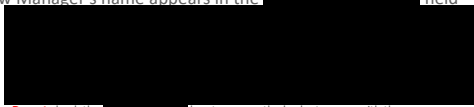
9. If you are reassigning a worker who is also a manager and you want to [REDACTED] select [REDACTED]



FWC Worksheet Manager

Change Worksheet Manager

10. The new Manager's name appears in the [redacted] field



Do not check the [redacted] box to ensure the budget moves with the person.

10. Click the [redacted] button to complete the [redacted]



12. Your name will appear in the [redacted] field along with the date you entered the [redacted]



13. Check the managers worksheets and verify your change



Fusion Tips



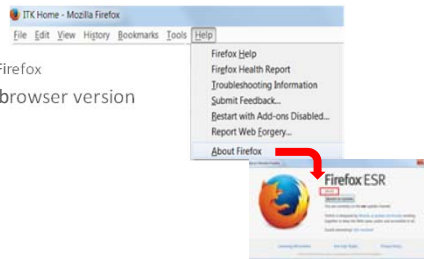
Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

24

Fusion Tips


Which Browser to Use

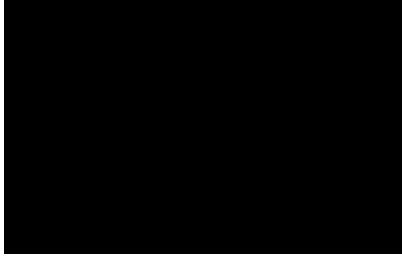
- **Firefox** is the preferred browser
- Use the latest version of Mozilla Firefox
 - Check your version:
 - From the Menu Bar
 - select Help > About Firefox
 - Download the latest browser version at MyDesktop
- Other Browsers
 - Chrome
 - Internet Explorer



Fusion Tips

Collapsible Panes

- Gain more working space by collapsing panes where possible
- Need more space to see your Worksheet? Click the left pointing arrowhead to collapse the  pane



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

26

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



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

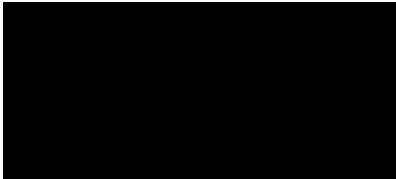
27

Fusion Tips

The first time the budget is selected you must chose a [REDACTED].
Your selection will affect the [REDACTED].



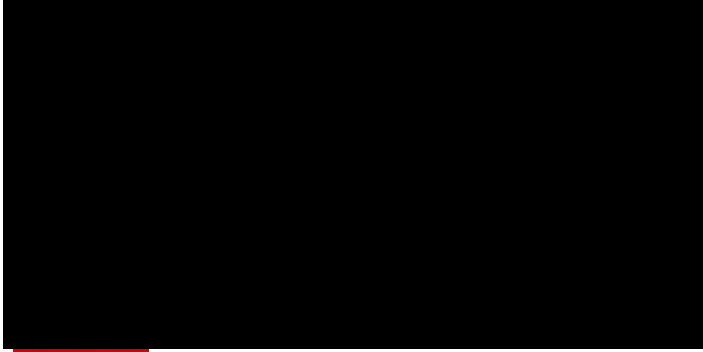
Selecting the [REDACTED] allows you to [REDACTED] if desired.



Fusion Tips

Access Level Guide

If a manager reports they “cannot see” something, you can use this chart to help identify what the manager’s access levels are set to.



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

29

Fusion Tips

How to Check and Add an [REDACTED]

All managers of people must have the

If your manager is experiencing access issues, getting error messages when trying to perform manager actions, [REDACTED]

Check the manager's [REDACTED] to ensure they have the [REDACTED]

Follow the instructions in the embedded [REDACTED]

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

30

Fusion Tips

FWC Manager User Guide – Global Bonus Process

For more detailed information, please refer to the

**Fusion Workforce Compensation
Manager User Guide
Global Bonus Process**

posted to the
Fusion Workforce Compensation
web site at



(Site will be live **June 6**)



Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

31

Questions on the HR Process



ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal

32

The Oracle logo consists of the word "ORACLE" in a white, bold, sans-serif font, centered on a solid red square background. The red square is enclosed within a thin, light gray border.

ORACLE®