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Manager Training

Compensation Process for Global Corporate Bonus & Fusion Workforce Compensation

June 2014

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Agenda

- Global Corporate Bonus Process
    - Fusion Workforce Compensation Pilot
    - General Info
- Fusion Workforce Compensation
    - How to Access and Use FWC to
        - Allocate Budget / Budget Modeling
        - Rank / Rate Employees
        - Award Stock
        - Work with Excel
        - Review Subordinate Mgr's Recommendations
        - Submit to Next Level
- Tools and Resources
- Fusion Tips

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Today we will be reviewing what's changing this year for the bonus process and provide general process info. We will also present the functionality of Fusion Workforce Compensation.

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

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For the Bonus cycle this year we will be doing a pilot in Fusion Workforce Compensation. This means that 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. All other organizations will enter their bonus recommendations as usual in Compensation Workbench (CWB).

Global Corporate Bonus Process -
General Info

- Timelines

  - FWC will be open to managers on 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

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Fusion Workforce Compensation is scheduled to open to you on 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.)

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

      STAR: Need website from Lorene

- Communication
  - Do not communicate a bonus until final LJE 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 compare to your employee population on your FWC worksheet. Remember that not all employee are eligible for the Global Corporate Bonus.

Remember that bonus amounts should not be communicated until final LJE 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.

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 or further analysis
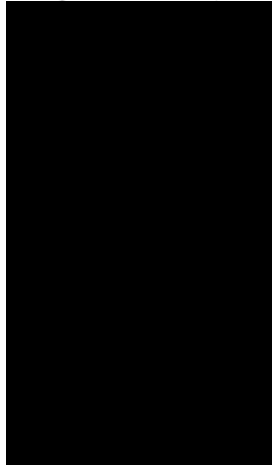- View submission status of subordinate managers

Note: Firefox is the preferred browser for Fusion applications

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How to Access CWB

- Log into SSA (Self-Service Applications)

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

Username: first.last@oracle.com
Password: ••••••• Go

Lost your password?

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To access FWC from the my.oracle.com homepage, select the ███████ ███████████████████████████████████.

On the next screen, click the ████████████████████████████ ███████████████,

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

Once in Fusion, click ████████████████████████████████████ ████████████████████████████

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Workforce Compensation

The Workforce Compensation landing page has █████████████████████

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███
███
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The Workforce Compensation landing page has 2 sections: ████████████████████████████
████████████████████ to the right.

███████████:

   Items found under █████ include the ████████████████████████████████████
████████████████████████████

   Clicking the █████████ will return the user to the ██████████████████████████

   Links to specific plans are under the appropriate header, for example the ███████████" (██ under the ███████████████████████ and "████████████████████ under the ███████████████ header.

   The █████ pane can be collapsed when the user is viewing a worksheet.

███████████

   The ████████████████ provides the user with a snapshot of information about the individual plan or pool such as the user's access level (such as "████████████████"), or, on ████████████, the number of eligible workers and the overall budget.

   The ████████████████████ also includes "████████████" short cuts will "█████ the user to the ████████████████████ where they 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 ███████████████████. This allows you to view their worksheet and even "█████ actions on their behalf. If your directs have subordinate managers, use the ████████ feature and you can also see their worksheet.

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We'll look at the tasks to perform for the Bonus Plan using Fusion Workforce Compensation.

The actions are organized as we would expect you to use them, from top to bottom.

•Working with your budget and determining if you will pass down budget to subordinate managers;
     looking at budget modelling and applying a model; and publishing the budget

•Rate and/or Rank your Employees. Not all LOBs require this action.

•Awarding bonuses to employees

•Using Excel to download a simple spreadsheet and the ███████ ███████ to allow download and upload of the Excel file

•Reviewing your Manager's Recommendations where you may Approve, Reject, or request more information.

•Submitting your work to the Next Level to obtain your manager's approval

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Budget Allocation

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Allocate Budget

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

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

Selecting the ██████ option allows you
to adjust the ██████████████ of
██████████████ if desired

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The Budget Method options are:

██
███████████

Caution: The budget access setting for your subordinate managers will be set to
██████████" and prevents additional changes. You must contact Comp
Administration to change this setting once selected.

██

(this is the most frequently used option)

Your direct report managers will have "██████████████" access. Select this option
if you decide to pass down budgets to your direct report managers. You can adjust
the settings for specific direct report managers within the budget worksheet.

█████████████████████████████████

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

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Allocate Budget

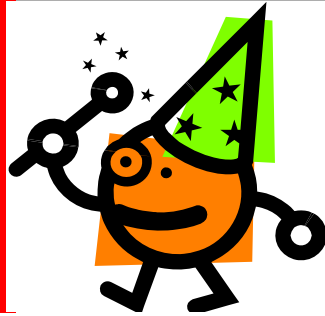Enter budget amounts in the **New Budget Distribution Amount** column

The "⬛⬛⬛⬛⬛⬛ row is your budget for bonus awards to your direct reports

⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛
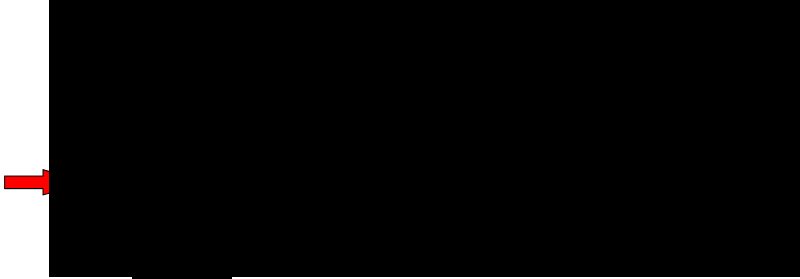
You must ⬛⬛⬛⬛ the Budgets so subordinate managers can award bonuses

Click the ⬛⬛⬛⬛⬛⬛⬛⬛⬛

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

Budget Modeling

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Budget Modeling

Models make it easy to see how different allocation methods and criteria affect your budget, worker allocation, and target amounts

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
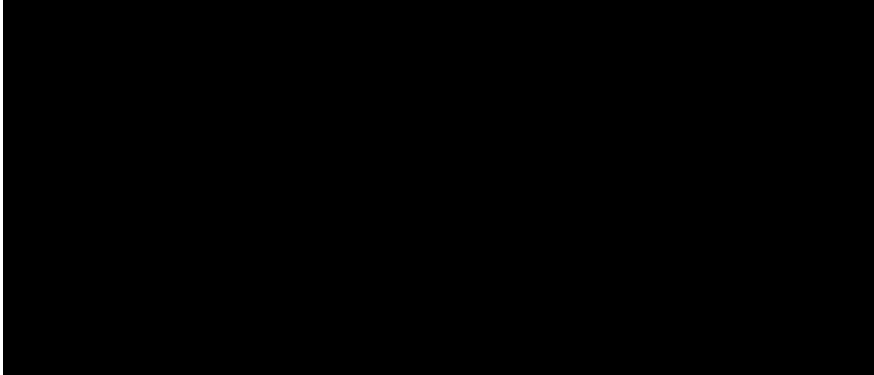## **<u>after the budget has been published</u>**

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Create a Budget Model

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

Select ██████████' ██████
█████

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

Create a Budget Model

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

████████████████████████████████████
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Create a Budget Model

Model Details will appear below the ███████

    Click the arrows ███████████████

    Use the ███████████████████████

Enter an amount in the '███████████████████████

    Example: You enter 5 and 10 in the '████████████████████████ as shown
          below. The available budget is reduced by 25,000.
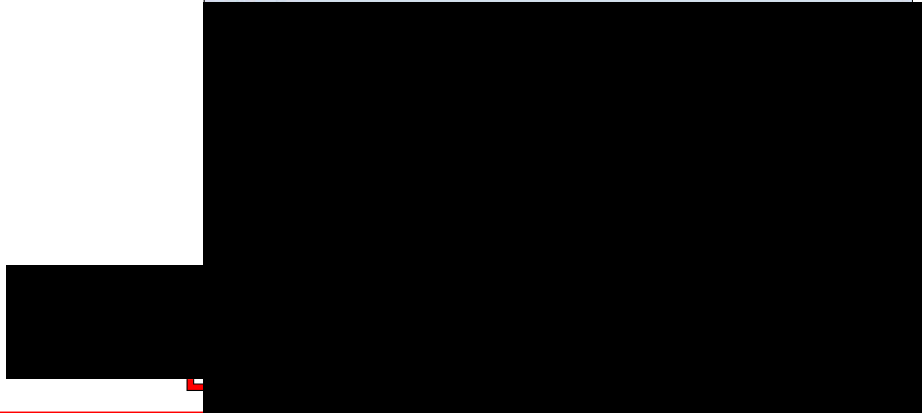
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Create a Budget Model

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

████████████████████████████████████
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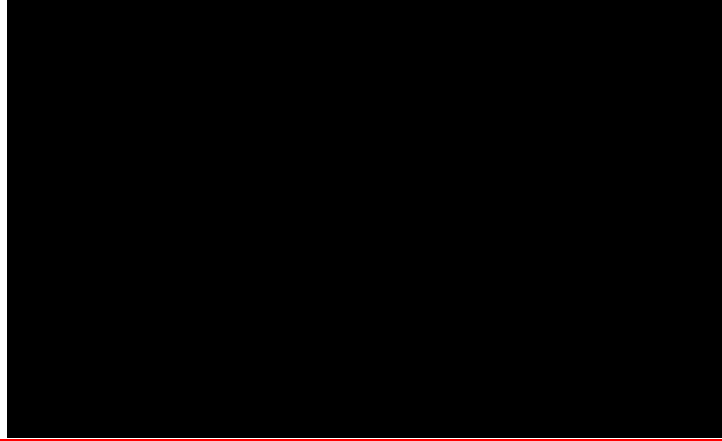
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Create a Budget Model

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

██
██

Optional:

If you have ████████████████, you can ███████
██████████████

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

██
██
██
██

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

Rank / Rate Employees

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Rank/Rate Employees

Some LOBs require managers to Rank and/or Rate their employees

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

⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛

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Excel Download
& Excel Export

Excel Download and Excel Export

There are 2 <u>different</u> Excel options for the Compensate Workforce worksheet

███
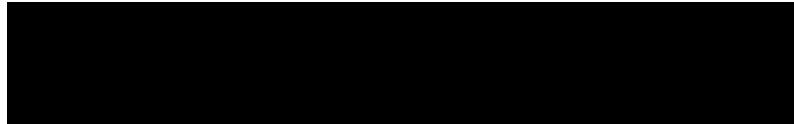
Download – Is a quick, easy way to get a copy of the worksheet
when <u>you do not need to upload</u> any work.
This is a one-way process.

Export – A two-way process for ████████████████████
– Requires download and installation of the ████████████
– Configuration of Excel
– **NOTE**: You must download the ██████ <u>each year</u> to ensure you
have the most recent version.

**Since a macro based file is being created, 'Export' will take
longer than 'Download' to complete**

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Excel Export
Installing the ███████████████████

Each year, before using the ████████████, you must download and install the ████████████████ This will ensure you have the latest ██████ 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

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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 ████████████████████████████████████
7. ████████
8. Under Excel Options, click Add-Ins and verify "████████████████████████████████" 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 "████████████████████████████████ 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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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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Award Bonuses

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Award Bonus: View Your Budget
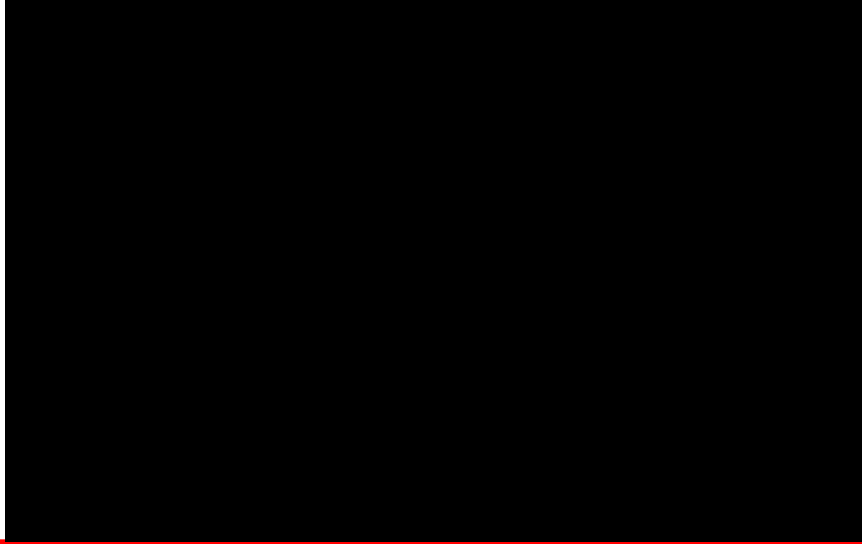
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Award Bonus: View Your Budget

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

████████████████████████████████████
████████████████████████████████████
████████████████████████████████████
████████████████████████████████████
████████████████████████████████████
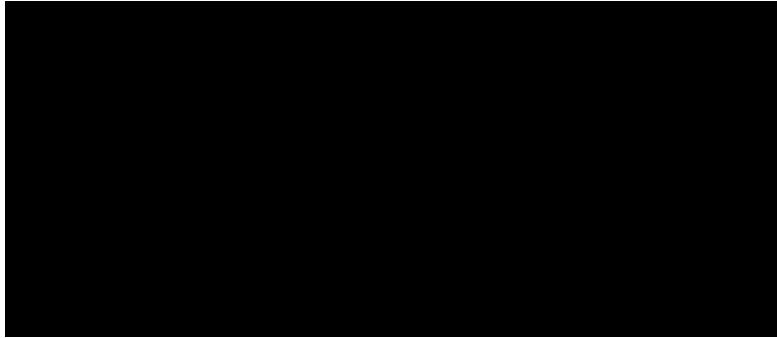
Award Bonus: Entering Bonus Amounts

- 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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Managers are responsible for the accuracy of the information in their worksheet.

Review the Eligibility guidelines if needed.

If you are missing an employee, or if there is inaccurate information, please contact your HR Rep.

Pay special attention if you had International transfers.

Award Bonus: ██████████████████████████

1. Click the ███████ icon 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 ████████████████████████
   ████████████████

   ████████████████████████
   ████████████████████████
   ████████████████████████
   ████████████████████████
   ████████████████████████

Award Bonus**: Excel Upload**

NOTE: If you are working remotely, you must connect via VPN to upload your file.

In the spreadsheet, click the Upload button and click OK for the default Upload Options:

The upload will process:
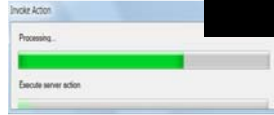
It is finished when you see the "Invoke Action" pop up that says "Worksheet was uploaded":

Invoke Action

⚠ Worksheet was uploaded.
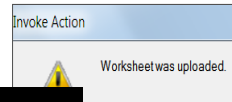
Click OK and scroll to █████ in the spreadsheet to verify the rows updated successfully:
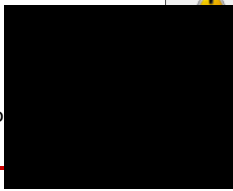
In FWC, click the plan link to refresh the Worksheet and verify your changes were uploaded.

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Review, Approve, and Submit

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Review

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

████████████████████████████████
████████████████████████████████
████████████████████████████████
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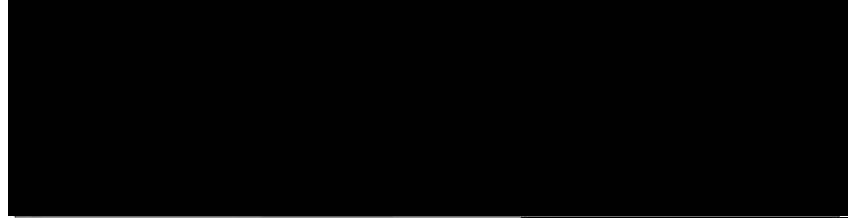
████████████████ : Enter a Comment explaining
the issue the manager must
correct

████████████████ : Enter a Comment asking for the needed
detail

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Review

From the ███████████ you can see your Approval status and the status of your subordinate managers:
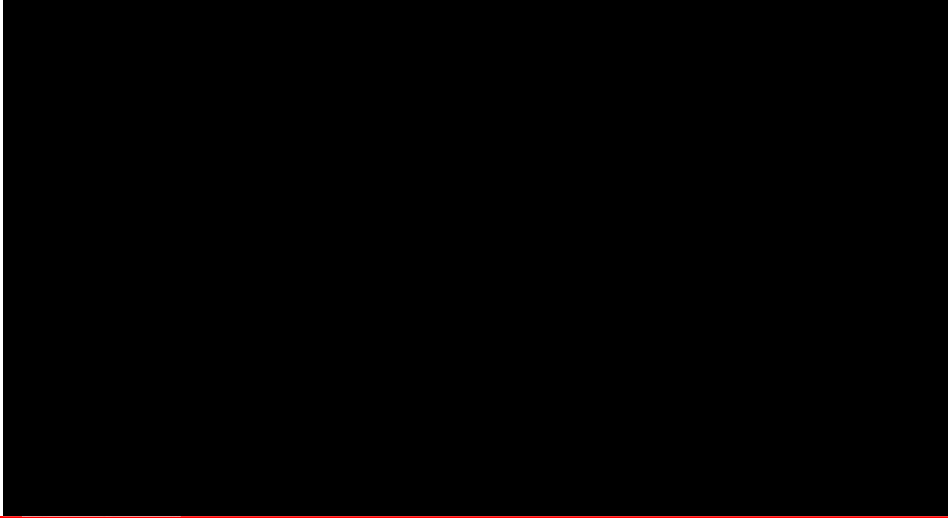
Approve

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

Submit Warning

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

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Submit to Next Level
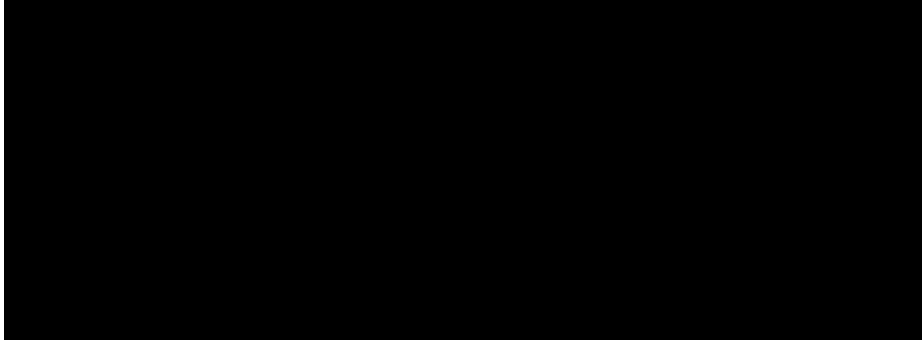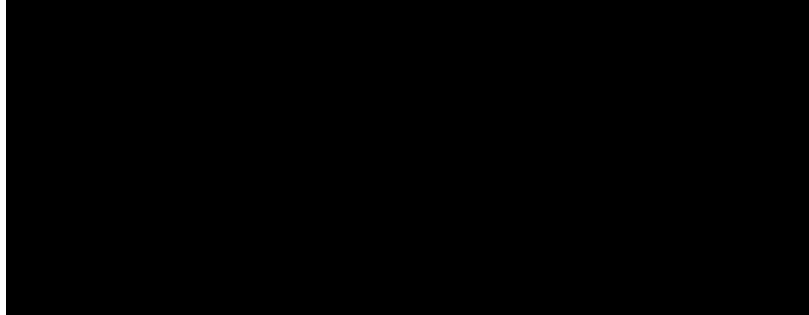
There are two ways to submit for approval to your manager

NOTE: ███████████████████████████

██
██
██
██

Submit to Next Level

Do not communicate any changes until the 'Last Approval Action' shows "Approved by Larry Ellison"

Before communicating with employees, verify their awards to ensure you are providing the latest information

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Tools & Resources

- For questions on your organization's timeline and budgets, contact your manager or HR Business Partner/Manager
- For questions on eligibility, contact your HR Business Partner/Manager
- For questions on Fusion Workforce Compensation access and functionality, contact add OAL support
- Fusion Workforce Compensation home page
  (url link here)
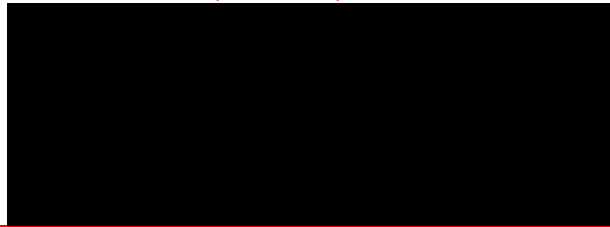
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Questions about your organization timeline and budgets should be directed to your manager and/or HR Business Partner.

Questions about eligibility, after you have reviewed the eligibility rules, can be directed to your HR Business Partner.

Questions on FWC access and functionality, contact _____

These training slides, the eligibility documents and a FWC managers guide will be available on the Fusion Workforce Compensation home page.
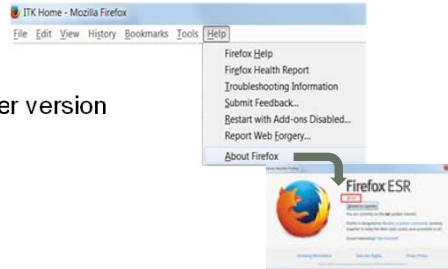
Questions

Fusion Tips

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

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Fusion Tips
Collapsible Panes

- Gain more working space by collapsing panes where possible
- Need more space to see your Worksheet?
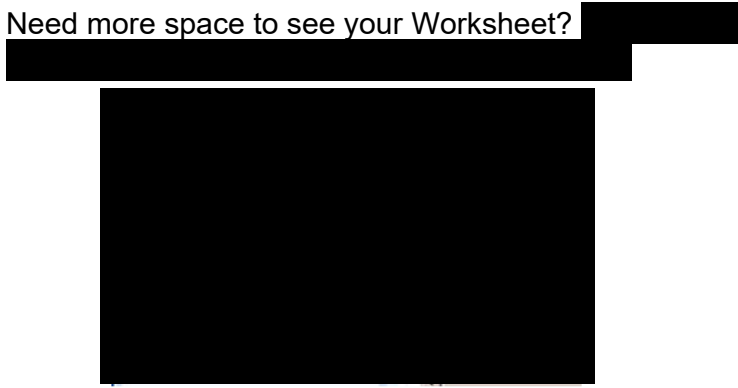
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Fusion Tips
Nested Scroll Bars

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, an 'inner' horizontal scroll bar was out of sight

- By using the <u>vertical</u> scroll bar, the inner horizontal scroll bar was revealed
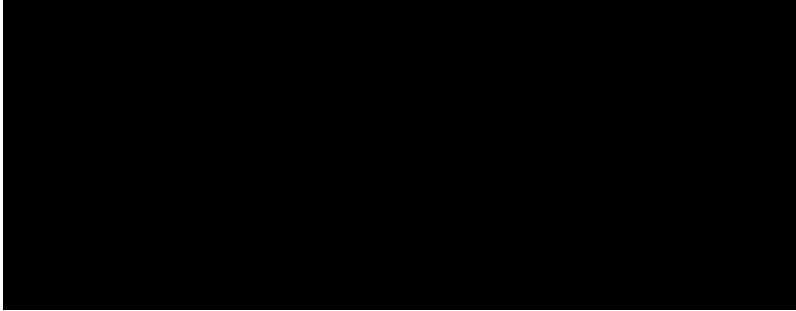
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Fusion Tips
Access Level Guide

Setting a manager's Budget and Compensation worksheet access level (████████████████████████ determines what they can see and do

Guide to setting worksheet access levels for subordinate Managers
Separate Budget and Comp worksheet access levels must be set for each open cycle plan. (e.g. Focal, Stock, Bonus, etc.)

[1]
[2] Not a recommended combination.

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