Annual Equity Program and Workforce Compensation

Manager Training

Oracle Compensation

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Agenda

1 ▶ General Program Information

2 ▶ Workforce Compensation (WC)
- Access to WC
- Allocate, Model and Distribute Budget
- Export to Excel
- Rate Employees
- Make, Review, Approve and Submit Recommendations

3 ▶ Tips and Resources

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Annual Equity Program

General Information

- Tools

  – All managers will use Workforce Compensation (WC) to enter recommendations.

- Timelines

  – Each LOB may establish their own internal timeline for the process. Check with your manager on 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.

  – Modeling is a feature is available to assist in pushing down budgets based on specific criteria

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Annual Equity Program

General Information

- Eligibility

  - Review the eligibility document posted on the Workforce Compensation website

  - Be sure the employee population for your organization is correctly reflected on your Workforce Compensation Planning worksheet

    - Not all employees are eligible for all of the corporate programs

- Communication

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

  - Always check Workforce Compensation **before** you communicate to ensure that the final recommendations have not changed

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Annual Equity Program

RSU vs. Stock Option

Restricted Stock Unit (RSU)	Non-Qualified Stock Option
A company's promise to issue company stock	Provide the right (but not obligation) to purchase stock at a specific exercise price
Subject to a vesting schedule	Subject to a vesting schedule
Almost certainly have some value Outright grant of stock once vested	**No guarantee of value** Depends on where the stock price is in comparison to option's exercise price
Risk to capital moment you vest	Risk only when you exercise
Generally, taxed at vest[1]	Generally, taxed when exercised[1]

[1] Note: Tax treatment may differ depending on country-specific tax regulations or other circumstances

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Workforce Compensation

Manager Planning
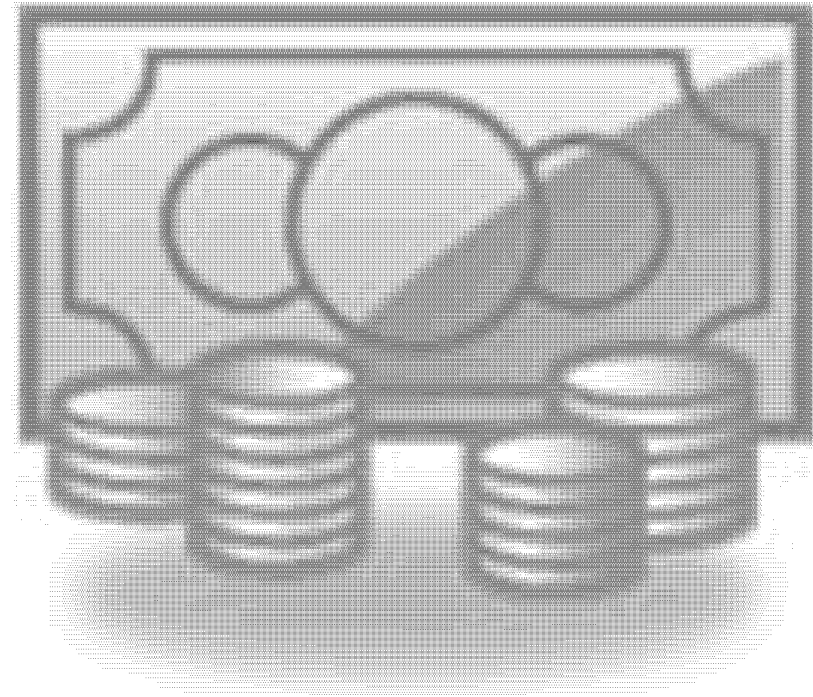
What is Workforce Compensation?

- 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

How to Access

Login

1. From ███████████████ ███████ click

2. Under ███████████████ select ████████

3. Log on with your SSO credentials

Sign In

Username

first.last@oracle.com

Password

••••••••••••

Forgot password? Reset password via OIM or call the Oracle Helpdesk.

Sign In

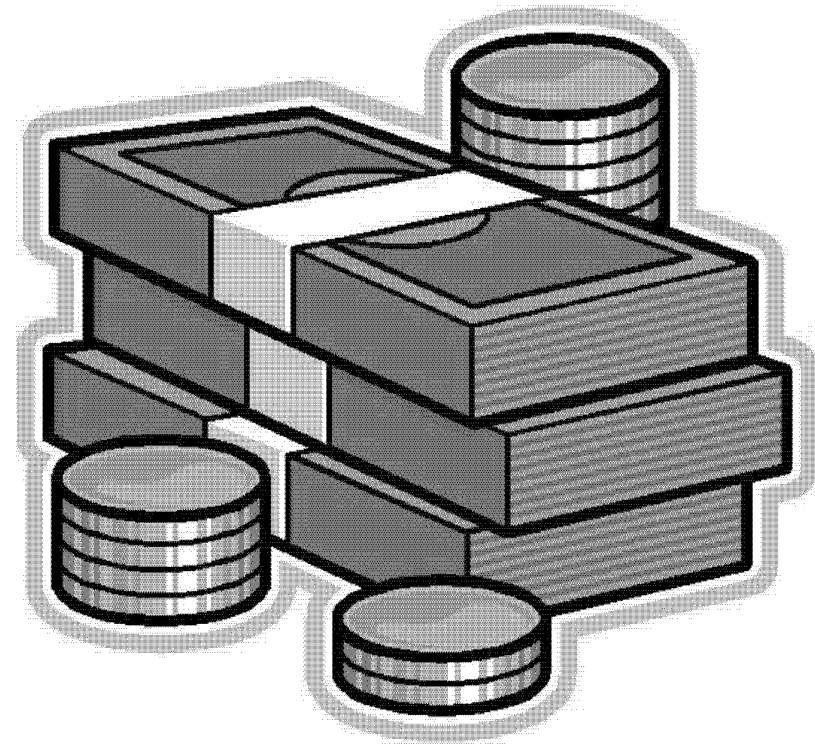4. Select ████████████ from the menu. This may be under the 'My Team' icon.

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

Workforce Compensation

███████████████████████████████

- ████████████████████ s the default display for Workforce Compensation from the HCM main menu
  - The ████████████████ lets you view your subordinate managers' worksheets
- ██████████ shows sections for ████████████████████████████████
  where specific worksheets can be opened

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Workforce Compensation

Budget Allocation

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Budget Allocation

- Go to ██████ and under ███████████████ click the ████
██████████████████████

- The **initial** time the budget is selected, you must choose a ███████████████ Your selection will affect the ████████████████████████

  1. ████████████████████████████████
  2. ████████████████████████████████

  3. ████████████████████████████████

- Selecting option ██████ allows you to ████████████
████████████████████████████████

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Budget Allocation

- Enter budgets in either column: ███████████ or ███████████
  - The ███████ row is **your budget** for recommendations to your ███████

- You must ███████ budgets in order for your subordinate managers to see them
  - Click the ███████████ next to the ██████ icon & select an ██████
  - If ███████ budgets to only a few managers, highlight ███████████ and use ███████

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Workforce Compensation

Budget Modeling
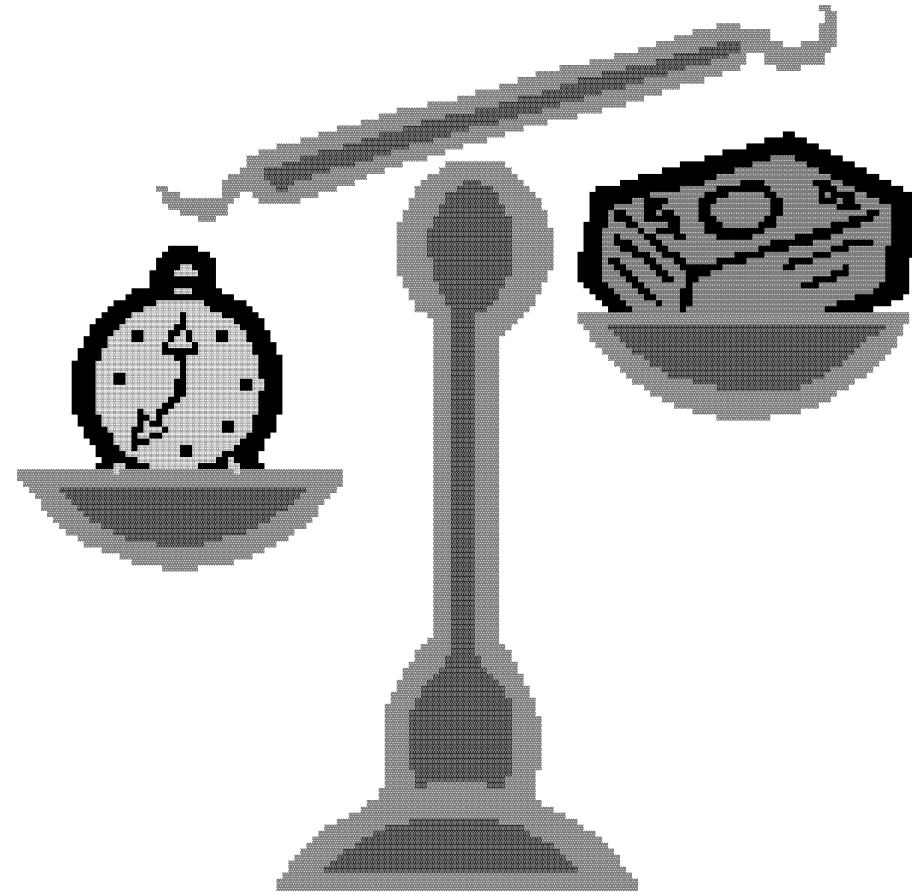
Budget Modeling

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

- Different models can be created, previewed and applied **before** publishing the budget

- Who might create Models –

  – Managers who intend to pass down budgets to subordinate managers

  – Managers who intend to make the allocations themselves, but hold the entire budget

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

Create a Budget Model

Create Model

- On the ████████████████████████████,
  click the ████████████████ and
  select █████████████

- Enter a ██████████ and click
  ████████

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Create a Budget Model

Model Properties

1. Choose an ███████████████████ from the drop-down list

2. Select up to ███████████ from the drop-downs

   Note: ██████████████████████████████

3. Click ███████████

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Create a Budget Model

Model Details

- Enter amounts in the ███████████ section to calculate and build the budget accordingly
  - Click the ████████

    ████████████████

  - Use the inner scroll bar to view the entire list

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Create a Budget Model

Preview Model Results

- The ████████ displays the ████████████████████████

- Two other tabs:

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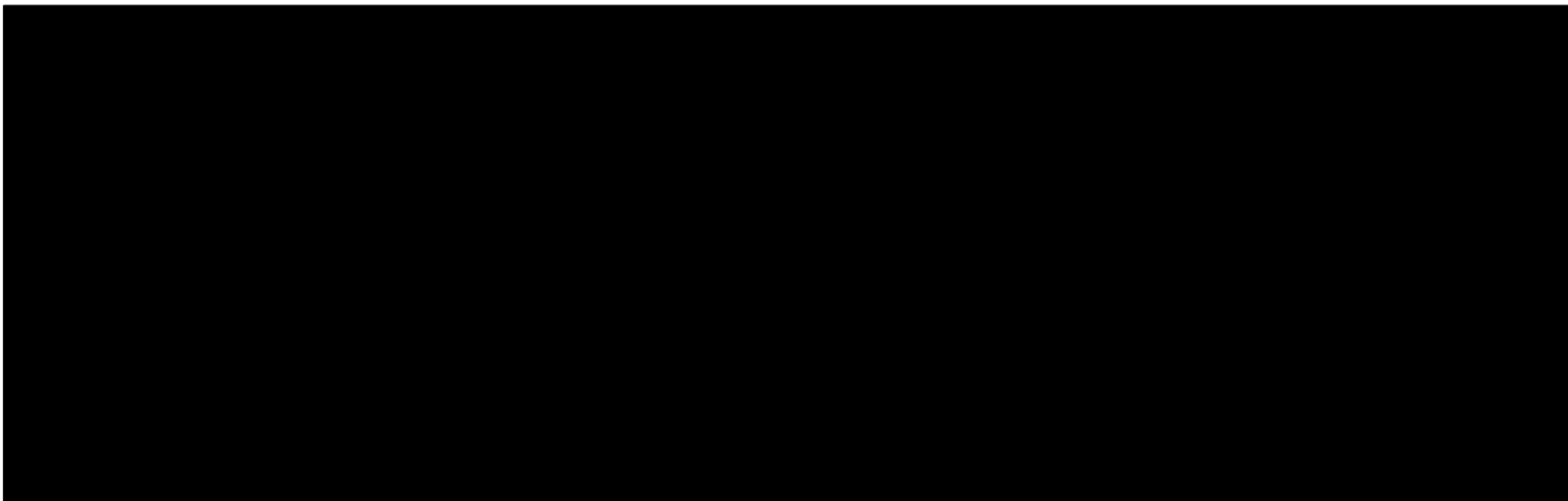
Create a Budget Model

- Click ████████████████ to make changes to the model

- If you have ██████████████████████████████ you can ████████████████
  ████████████
  - Click the ██████████████████████, choose ██████████████████████ from the ████████
  - Go to the Budget worksheet and confirm the model amounts have been applied

- Click ██████ to return to the ██████████████████████████████

  NOTE: Applying a Model will **overwrite** any previously entered awards.
  Models should **never** be applied **after** the budget has been published.

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Workforce Compensation

Excel Export

Excel Export

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- ████████████████████████████████████ is a two-way process for ████████
████████████████████████ Amounts are always in local currency, unless otherwise indicate.
This function requires:

  – Download and installation of █████████████████

  – Configuration of Excel

  – For detailed instructions, please refer to the ██████████████████████████ posted on the
█████████████████████████████████████

NOTE: You must download and install the latest version of ██████████████████ to use this functionality.
If you are using Firefox, it will prompt you to update to the new version, if there is one.

Workforce Compensation

Rate Employees

Rate Employees

- Open the appropriate plan from either

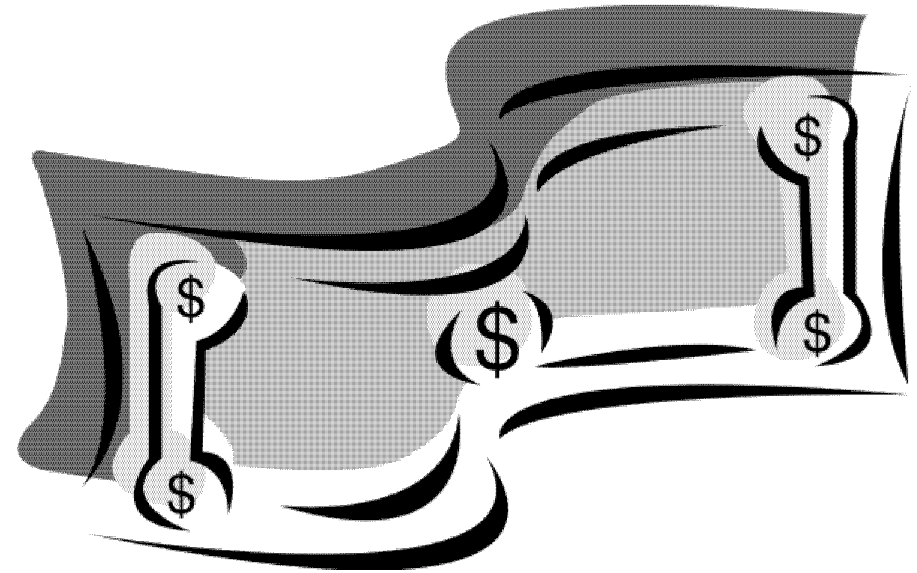- On the

- Use the

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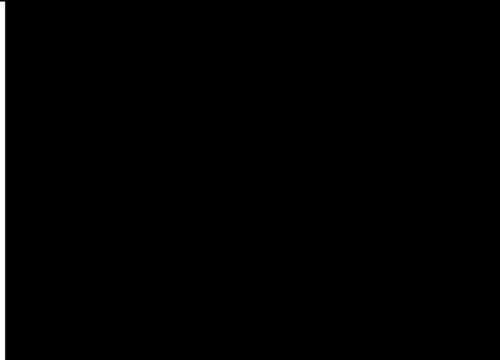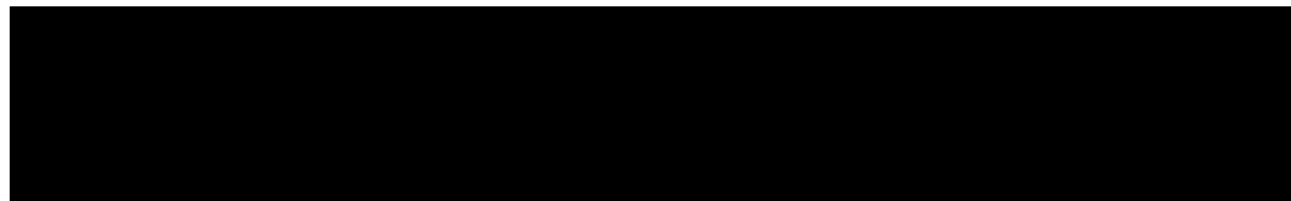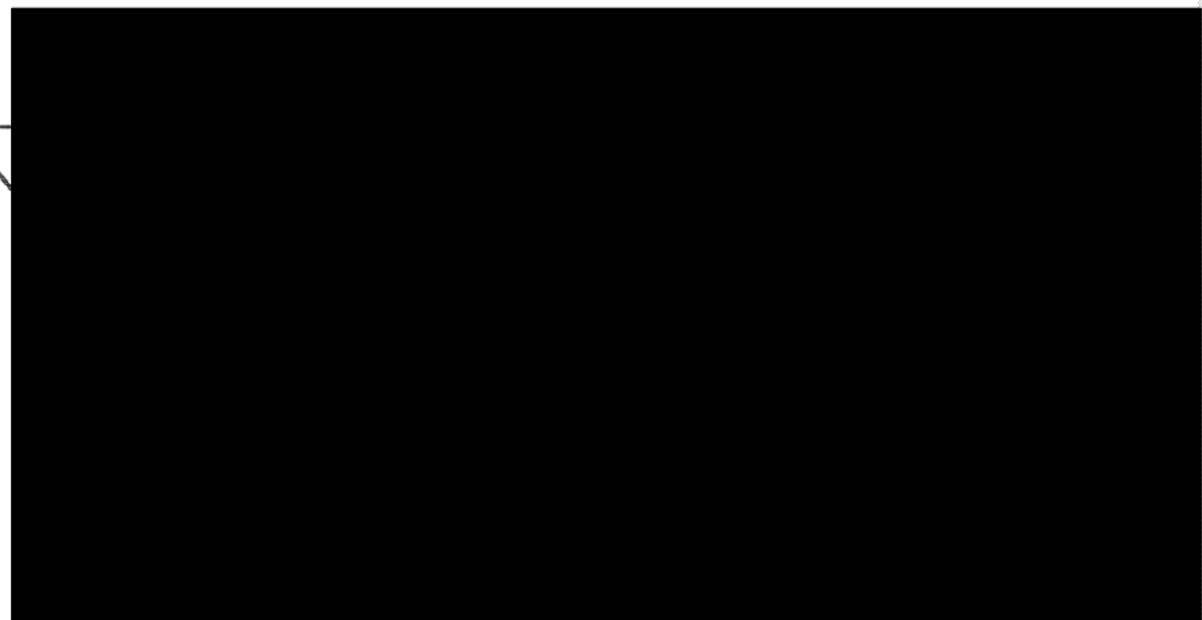
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Workforce Compensation

Make Recommendations

Make Recommendation

View your Budget: Option 1 – ████████████████

- The ████████████ is for your entire organization, and stays the same regardless of the ████████████
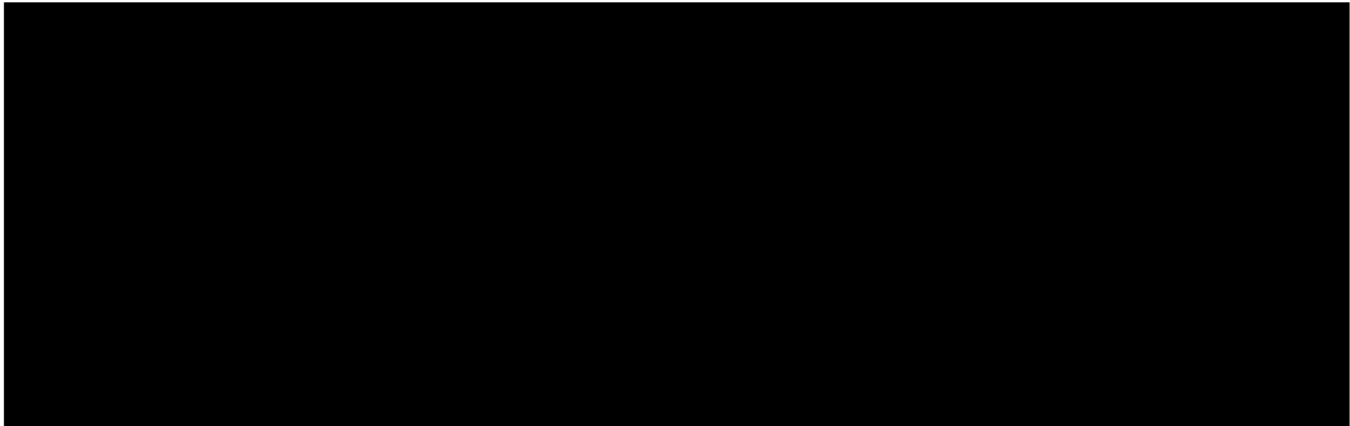
- The ████████████ changes with the value selected

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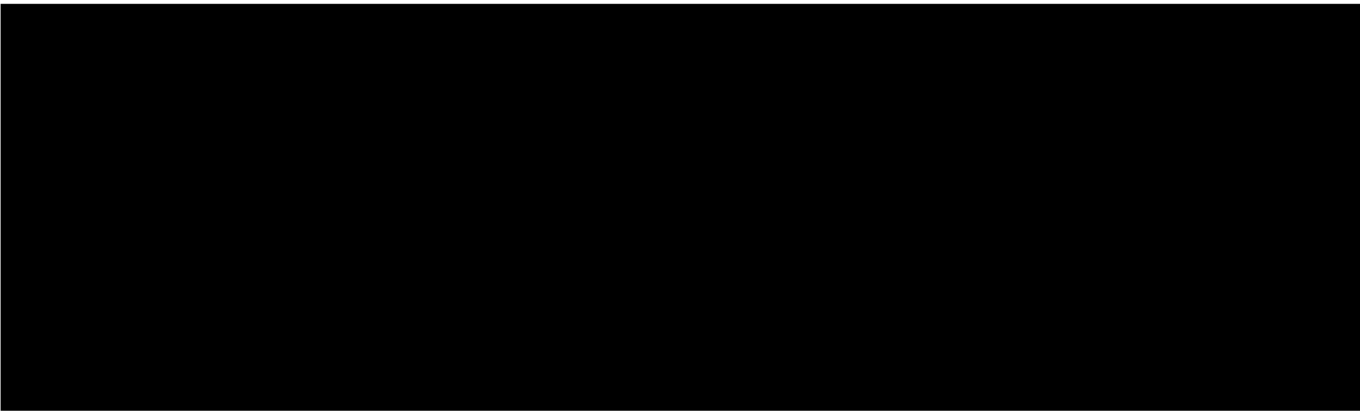
Make Recommendation

View your Budget: Option 2 – █████████

* The recommended way to view your budget is from the ██████████
Open the ██████████████████ link to see your budget information.
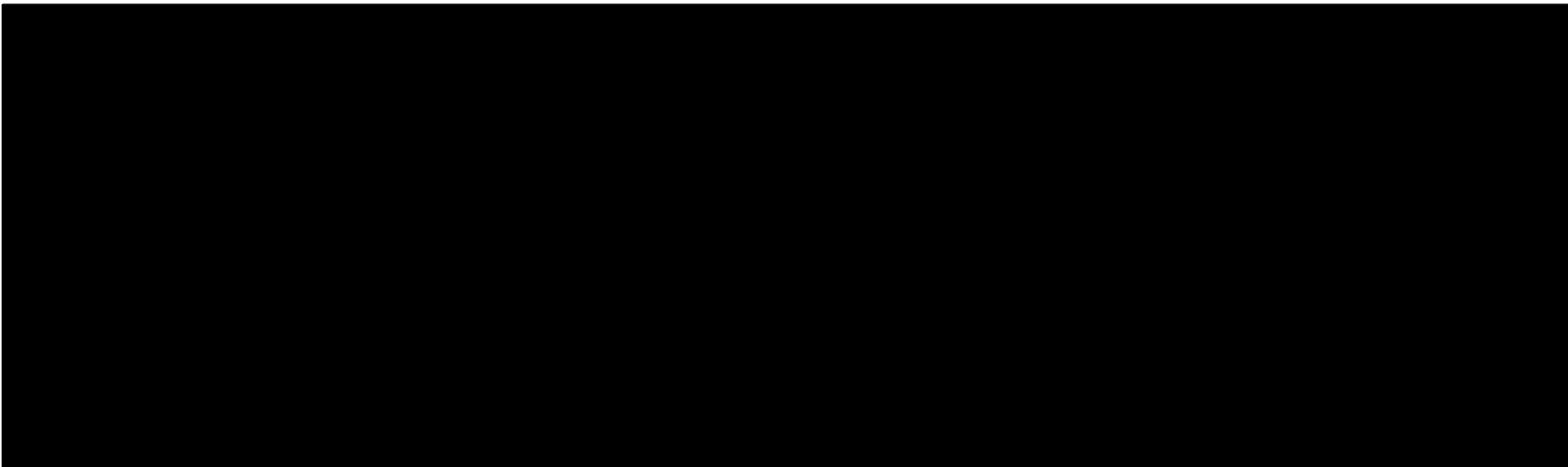
Make Recommendation

Entering Recommendations: Option 1 ███████████████████████

- Enter Equity recommendations in the ██████████████ column

- After making entries, save your work

◢ Worksheet

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WARNING!

⚠ **DO NOT SUBMIT** until **ALL** of your subordinate managers have submitted their work to you. Your submission **removes** their access.

Make Recommendation

Entering Recommendations: Option 2a – ████████████████████████

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- Click the ████████████████████ icon
- Click ███ on the ████████████, and ████████████████████████
- If the ████████████████████████████████████
- A **successfully downloaded file** will ████████████████████████
- Verify the ████████████████ column has no background color and ████████████████

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Make Recommendation

Entering Recommendations: Option 2b – █████████████████████████████

NOTE: If you are █████████████████████████████████
████████████████

- In ███████
  - Click the ███████ button in the ████████████████████ tab of the toolbar
  - On the ████████████████████ click ██ for the default
  - The ████████ will start to process
  - ████████ is complete when you see the ████████████████████ that indicates ████████████████████
  - Click ██ and ████ to ████████████████ to verify the rows updated successfully
- In Workforce Compensation:
  - Click the ███████ link or ████████████ to refresh the ████████████████████ and verify your changes were ████████████

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Workforce Compensation

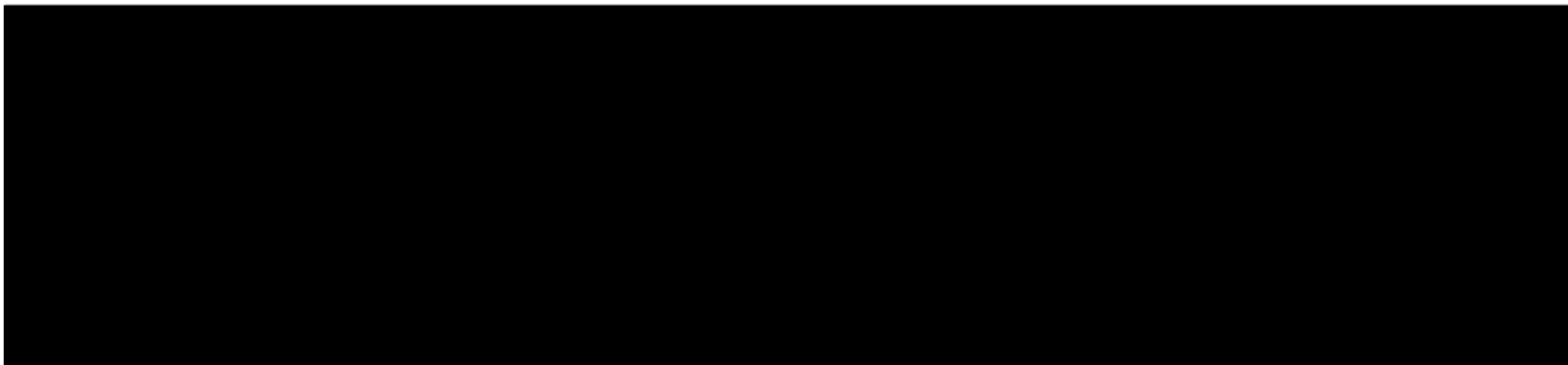**Review, Approve and Submit**

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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 ██████████ and click ███████████████ or ███████████████ respectively.

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Review, Approve and Submit

Review: Worksheet Status

On the ⬛ tab, you can see your organization's ⬛. The ⬛ or ⬛ icons show more information. In order, the Statuses are:

- ⬛
- ⬛
- ⬛
- ⬛
- ⬛
- ⬛

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Review, Approve and Submit

Approve

- Approve your subordinate managers' submissions via the ⬛⬛⬛ tab. Click the ⬛⬛⬛ and make a selection:

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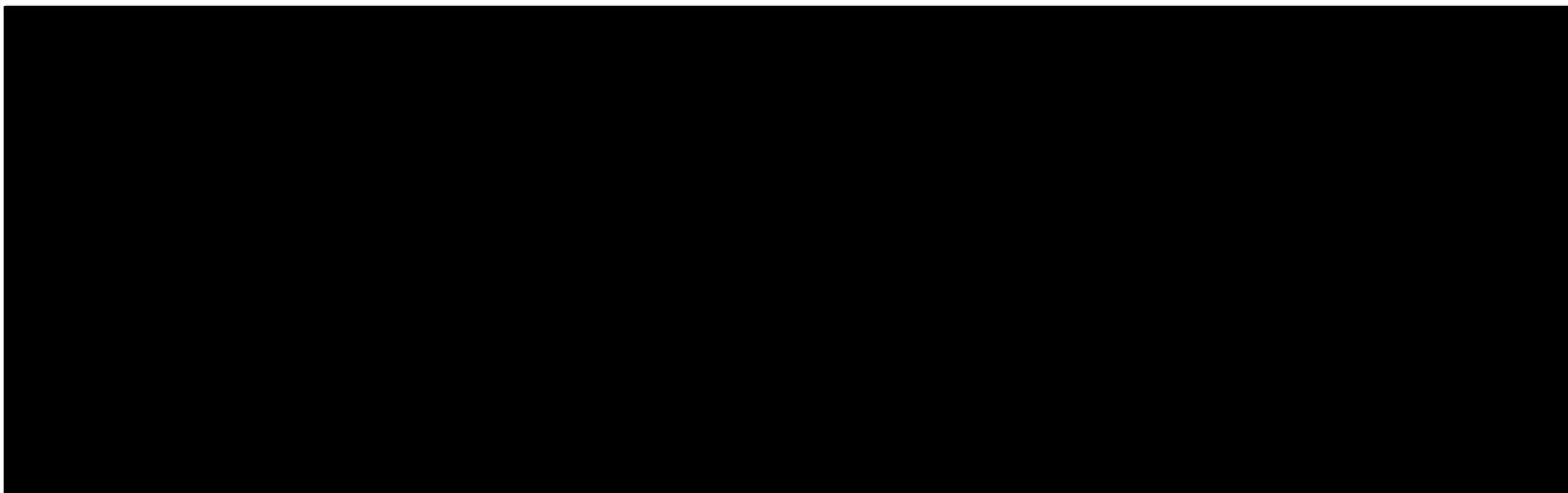
Review, Approve and Submit

Submit: Warning
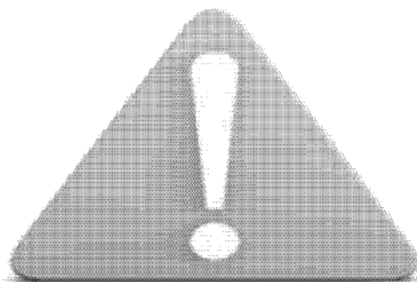
DO NOT submit until your subordinate managers have completed their submission to you

Review, Approve and Submit

Submit: Option 1 – ███████████

• On the ███████████████████████████, click the █████████████ and
select ████████

NOTE: When you ███████████████████████████████

Review, Approve and Submit

Submit: Option 2 ▮▮▮▮▮▮▮▮▮▮▮▮▮▮

- On the ▮▮▮▮▮▮▮▮▮▮ , click the ▮▮▮▮▮ button

▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮

Once you have ▮▮▮▮▮▮ you are finished with the recommendation process

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

Last Approval Action will show **Fully Approved**

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

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Workforce Compensation

Tips and Resources
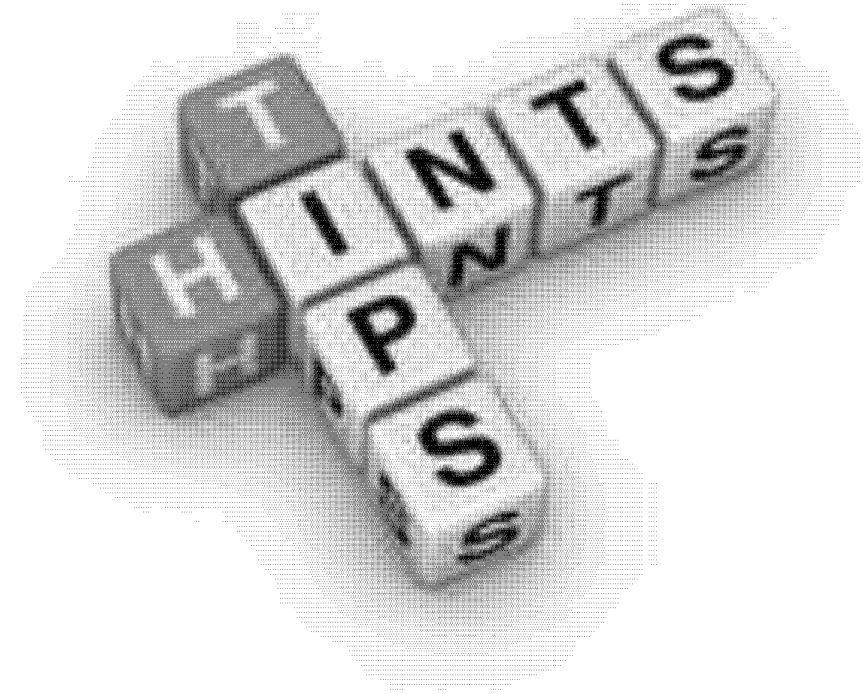
Workforce Comp Tips

Browsers

- Firefox is the preferred browser
  - To check your version: From the Menu Bar > Help > About Firefox
  - Download the latest browser version from MyDesktop

- Other Browsers
  - Chrome
  - Internet Explorer

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Workforce Comp Tips

Expand Arrows

- If the Team filter is not visible, █████████████████████
█████████████████

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Workforce Comp Tips

Nested Scroll Bars

- Workforce Compensation has nested scroll bars (inner and outer)
  - Use the vertical scroll bar to reveal the horizontal scroll bar at the bottom
    - The horizontal scroll bar was out of sight. By using the vertical scroll bar, the horizontal scroll bar was revealed.

Workforce Comp Tips

Currency Switcher

- Planning in Local Currency vs. USD
  - Manually in the tool: Recommendations can be made in local currency or USD, depending on the ██████████████████████████████ next to the ████ button. The ████████████████████

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Workforce Comp Resources

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 any manager is experiencing access issues or getting error messages when trying to perform manager actions, ████████████████████

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Workforce Comp Resources
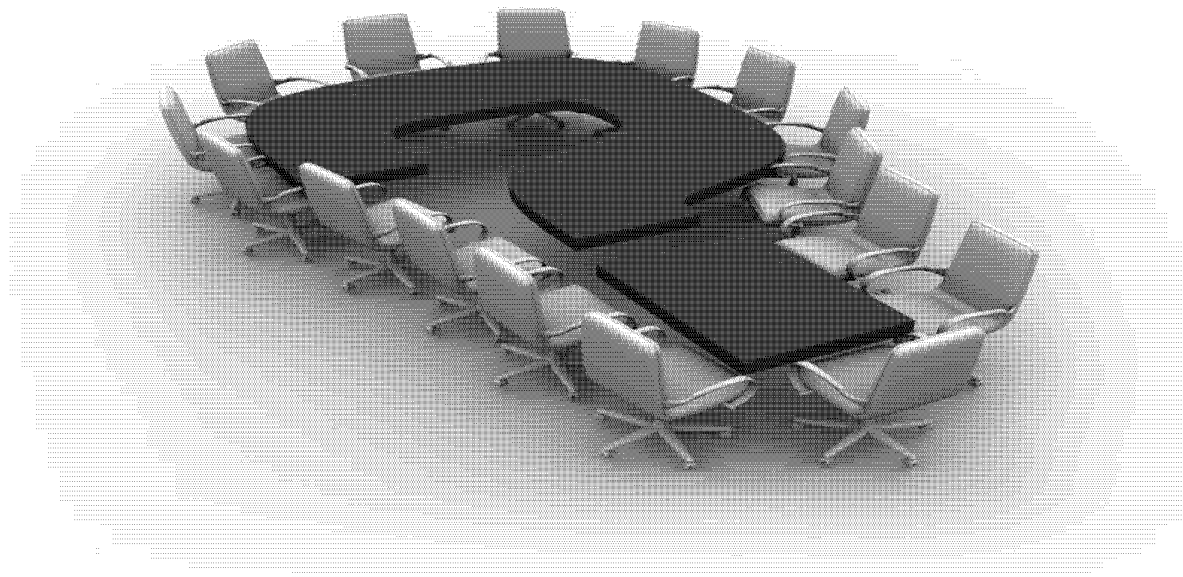
Contacts & Workforce Compensation Website

- Questions about:

  – **Timeline and Budget** for your organization: Contact your manager or HR Manager

  – **Eligibility**: Contact your HR Manager

  – **Workforce Compensation access and functionality**: Submit MyHelp ticket at:

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- For more detailed information, please refer to the Workforce Compensation website:

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Questions

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