New Manager Training
Compensation Processes/Compensation Workbench

May 2011
Agenda

• Compensation process – Important things to remember
  • Compensation process timeline
  • Budget
  • Eligibility
• Accessing/Using CWB
• Q&A
Compensation Processes

CWB will open to managers on or around the below dates subject to budget approval.

- Annual Stock Grant
  - May 12th

- Non-Sales Salary Review
  - June 3rd

- Sales Salary Review
  - June 21st

- Corporate Bonus
  - June 11th
Summary for all Processes

- Each LOB will have its own timeline for each process.
- Be sure to clean up your worksheet promptly!
- Do not communicate anything until final LJE approval is obtained.
- Always check CWB before you communicate to ensure that amounts haven’t changed.
- Always communicate in local currency.
Managing Budgets & Process

- Budgets are set at the very top exec level & each LOB head has his/her own method of allocating.
- Each LOB will have its own timeline for each process.
- The Allocation Wizard is available to assist in pushing down budgets based on specific criteria.
- In EMEA & LAD there are some countries with mandatory increases.
- When budget is lean, extra care and attention must be given to awarding the top performers with low compara-
ratios (FTE annual base salary/salary midpoint).
Eligibility

• Review the eligibility document posted on the CWB homepage.

• As a manager you are responsible to ensure that your employee population is reflected correctly on your worksheet(s).

• Not all employees are eligible for all processes.
International Transfers

- Identify international transfers
- Compensation runs a report to identify but some can still slip by depending on timing.
- Check the former country to ensure eligibility before contacting HR Business Partner.
- Provide the following information in an email to the HR Business Partner in the receiving country:
  - Former country code/employee id
  - Total number of eligible days (former and current)
  - Total eligible salary in local currency
  - A description of why the employee should be made eligible
Tools & Resources

- Your manager

- HR Business Partner or Compensation Group
  - HR Global Website lists compensation contacts & you will find your HR Rep & Manager by checking your ARIA page

- IWB – displays salary information and history for all employees within your organization

- MEE (Manager Self Service) – Compensation training modules.

- HR Global Website, Global HR Policies
What is Compensation Workbench?

Compensation Workbench (CWB) is an Oracle Self Service Application that enables managers to manage the stock, corporate bonus and salary review processes:

- Plan, model, and allocate budgets across multiple currencies
- Distribute budgets to managers
- Rate, Rank and Award individual employees compensation
- Promote employees into new jobs
- Review historical compensation information.
- Easily view and download employee information for off-line work or further analysis
How to Access CWB

To access CWB from the my.oracle.com homepage, select the [Link] link from the [Menu]. When prompted, enter your Single Sign-On details.
How to Access CWB (Cont.)

- Once logged in:
  - Select [Redacted]
  - Under [Redacted] Compensation Workbench

Once you are logged into SSA, you will select [Redacted] from your list of available responsibilities. Note that even though you are selecting a US responsibility, you will still be able to manage all your employees globally. The preceding country code defines the country that you reside in.

The right side of the screen will then populate to show your list of choices for that responsibility. From it, select [Redacted] under the [Redacted] header.

If a manager is missing the responsibility they need to log an SR to request it be added.
Eligibility guidelines & FAQs are posted in CWB.
Plan Tasks – Overview

In this example we’ll look at the Global Salary Increases/Adjustments Module.

The action options are set up in the order we would expect you to use them, from top to bottom.

Let’s get familiar with these options
Budget Allocation
Allocation Wizard
Allocation Wizard
Allocate Budgets
Rank / Rate Employees
Plan Tasks – Rate/Rank Employees
Job Assignment
Award Compensation
Managers are responsible for the accuracy of the information in their worksheet.
Part-time employees will appear with the full-time equivalent base salary. Allocate the salary increase based on the FTE and the amount will be prorated at the time of processing.

Eligibility guidelines & FAQs are posted in CWB

Missing an employee, or if there is inaccurate information, please contact your HR Rep.

International transfers may appear as new hires.
Download / Upload - Excel
Have you configured your Excel?

Excel 2007 configuration settings:
Please follow the below instructions:
1. Open Excel 2007
2. Click the Microsoft Office Button (the button is a circle with the word blue, yellow, green squares in it)
3. Click on Excel options (Bottom of the window)
4. Click on Trust center -> Trust Center Settings
5. Click on Macro settings and under the Developer Macro settings check the “Trust Access to the VBA project Object Model”
6. Optional step: Under Macro settings you can check enable all macros (but this can have security implications)
7. Save and close Excel window
8. Now try downloading the sheet, office 2007 will block the macro but notify you. You click on the notification and enable the content. This will start the sheet downloaded.

Note: you will now find the Oracle Menu to upload the worksheet under the ‘Add Ins’ tab.

Once the Excel spreadsheet settings are set, please check Internet Explorer Settings:

1. Navigate to Tools -> Internet Options and choose the Security tab.
   - Select Local Intranet and choose the Custom Level button
   - Set the download to 'Enabled'

   - Make sure the correct Web content zone is selected and press the Custom Level button. Set ‘Initialization and script ActiveX controls not marked as safe to ‘Prompt’. Press the OK button on this page to restart the document creation process. Select ‘Yes’ when prompted to accept an ActiveX control to complete the process.

Some HP had additional issues, see below additional instructions:
Set Internet Trusted site options and check the Trusted site settings:
   - Go to Internet Options -> Security -> Select Local Intrnat Zone
   - Click on the ‘Site’s button
   - You should have ‘Automatically detect intranet and network checked marked.

   a) Click on the ‘Advanced’ button
   b) Add this URL to your list of trusted sites
   c) Insert the ‘Secure sever verification (https) for all sites in this zone is Unchecked
   - Go to Internet Options -> Security -> Select Trusted Zone
   - Click on the ‘Custom Level’
   - I’ve also added my local intranet settings to compile with your ‘Trusted zone’ settings.
   - Finally, click ‘OK’ to close the Internet Options dialog box.
   - Click the browser window so that new settings can be used.
   - Then try the downloaded.
Download to Excel

Step 3)

Select "Enable this Content" and click "Ok!"
Approve and Submit
Plan Tasks – Review and Approve
Finally you will find in the additional training modules for and other Self Service Applications.
Questions?