Annual Bonus Program and Workforce Compensation
Manager Training

Oracle Compensation
Summary of Changes from Last Compensation Program

- **Budget Model**: The model feature has been updated to a more streamlined approach that no longer requires nested scroll bars. See the Budget Model section for step-by-step instructions and screenshots.
Submit Warning

Do NOT submit until your subordinate managers have completed their submission to you

An important reminder to all: Submit only when your entire organization has completed their recommendations, because when you submit, you are submitting for your entire organization.

If you submit before everyone has completed their work, you must manually change the access level for every affected manager. There is no way to do this automatically.
Today we will be reviewing general program information and the functionality of Workforce Compensation that you may need as a manager, along with tips for working with Workforce Comp and tools and resources available to answer your questions during the compensation process.
What is Workforce Compensation?

• Workforce Compensation (WC) is an Oracle Self Service Application for managing compensation processes, allowing you to:
  – Model and distribute budgets to subordinate managers
  – Make, Review and Submit Recommendations for employees
  – Download to an Excel spreadsheet to work offline
  – Rate employees (Compensation Rating only, not Talent Performance Rating)
  – View historical compensation information

Note: Firefox is the preferred browser for Workforce Compensation

Workforce Compensation is an Oracle Self-Service Application for managing compensation processes. The tool allows you to determine how to pass down budgets to your subordinates and includes features to model, distribute and publish budgets to your organization.

Using Workforce Compensation, you will make recommendations, review your subordinate managers’ recommendations, and submit recommendations for your entire organization to your manager for approval. The tool also gives you the capability to download your worksheet to an Excel spreadsheet, in case you’d like to work offline.

You can use the tool to Rate your employees. However, please note that this is a Compensation rating only for this program. It is NOT the official Talent Performance Review Rating.

Finally, you can also view historical compensation information for individual employees in the tool.

• When working with Workforce Comp, remember that Firefox is the preferred browser.
Annual Bonus Program

General Information

• 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 within their organization.
  – Modeling is a feature is available to assist in pushing down budgets based on specific criteria.

Timelines

Your organization will have an internal timeline for the process to allow for review and approval before final submission. Please check with your manager on the specifics for your organization.

Budgets

Budgets are published to the top executive level of the organization and each LOB leader is then able to determine the method of cascading budgets in their organization.

Workforce Compensation has a modeling feature to assist managers in pushing down budgets, which we will review later in the presentation.
Please review this year’s process eligibility document, posted on the Workforce Compensation website. The link is included at the end of this presentation in the Tools and Resources section. Be sure your eligible employee population is correctly reflected on your Workforce Comp Worksheet. Remember that not all employees are eligible for all of the compensation programs - bonus, equity and focal all have different eligibility criteria.

Recommendations should not be communicated until final approval has been received. This notification will come from Corporate Compensation through your manager or HR manager. Also, adjustments can sometimes happen during the approval process, so always check Workforce Comp before communicating a recommendation.
This section introduces you to Workforce Compensation and explains how to access and use the tool as a manager.
To access Workforce Compensation from the MyOracle Employee Portal, select the link from the menu.

On the next screen, click

Once logged in, select the link under the icon.
The landing page defaults to the first plan available to you, the can be accessed for each plan via the icons and links on this screen.

1. , in the middle: Use these links to open the and Worksheets, to see and Compensation Overview or to access .

2. , at the top: Use this to switch to managers in your hierarchy. This allows you to view and on behalf of any subordinate manager in your organization.

3. , also at the top: Click this to return to the screen.

4. , to the right: Available on this screen only, it will , not just your own worksheet.
Workforce Compensation
Landing Page –

Click on the [ ] to view and switch to other available plans:

Click the [ ] to open the [ ] screen, where you can select from a list of available plans.

Click [ ] to close the screen without switching plans.
Now let’s begin with budget allocation.
Budget Allocation

- Next, select the [ ] to update.
- The first time the budget is selected, you must choose a [ ]. Your selection will affect the

1. All subordinate managers will be set to [ ]
2. Direct report managers will have [ ] and will be able to choose how to [ ] within their own organization. This is the most frequently used option.
3. All subordinate managers will be set to [ ] and you will be able to change [ ]
   Selecting [ ] allows you to adjust [ ]

To distribute your budget, on the page, select [ ] from the [ ] section. Next, select the [ ].

The first time you select a budget pool, you will be asked to choose a budget method. This step is very important - it will determine the budget access of your subordinate managers.

The options are:

All your subordinate managers will be set to [ ] for the [ ] Worksheet, but they will still be able to make recommendations on their Compensation Worksheet.

[ ] (this is the most frequently used option)

Select this option to pass down budgets to your direct report managers. They will have [ ] access and will be able to choose how to distribute budgets within their own organization. You can adjust the settings for specific direct report managers within the Budget Worksheet.

Use this option if you will be passing down budgets to all subordinate managers yourself. All subordinate managers will have [ ] access and only you will be able to change budget amounts. You can adjust the settings for specific subordinate managers within the Budget Worksheet.
Budget Allocation

• Enter budgets in the column. The row is your budget, for recommendations to your direct reports.

• You must budgets in order for your subordinate managers to see them.
  – Click the arrow next to the icon and select an option.
  – If you want budgets to only a few managers, highlight and use.

The row is the budget you are keeping for yourself, to give recommendations to your direct reports.

You must budgets in order for subordinate managers to see them on their worksheet, and to further distribute to their own organizations. To your budget, click the next to and select, as indicated by the green box. You can choose to by using the keys to select multiple managers before...
In order to distribute your budget, you may need to do some modeling first.
Budget Models

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

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, models should never be applied after the budget has been published; more importantly, applying a model will overwrite any previously entered recommendation amounts.
Create a Budget Model

Create Model

• On the [ ], click the [ ] drop-down and select [ ]

• Enter a [ ] and click [ ]

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

Enter a model name – choose one that is meaningful to you. The Plan, Associated Budget, Total Workers and Mode will default to values determined by the plan administrator. Click **Continue**.
Under the **Define Model** section, choose an indicated by #1.

Enter up to for the model. Use the to make your choices. The , but will not appear until after the are entered.

When finished, click **Next**.
Create a Budget Model

Select Workers

- Use the drop-down to Include or Exclude employees from the model. If all employees should be included, simply click the button.

Use the down-down to include or exclude employees from the model. Click to continue. If all employees should be included, simply click.

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Create a Budget Model

Enter Values

- Enter amounts in the column to calculate amounts for the model. Click when done.

The model details will then appear and you can now enter amounts in the **Percentage of Eligible Salary** column. Once your model is done, click the **Next** button.
Create a Budget Model

Select Purpose

• Select [ ] and click [ ]
  – Default: [ ] is the most common

Select how to [ ] The default to [ ] is the most common.
Create a Budget Model

Review Results

* Use the drop-down to view results by or .

Use the drop-down to review the results of your model. Click to change model properties or to continue.

shows the , whereas shows the .
Create a Budget Model

Apply

* Select existing budgets. Click and follow the prompts to your budget worksheet.

  - Additional adjustments can be made on the budget worksheet after you but don’t forget, the final step is to budgets to your subordinate managers.

* Click to save the model without applying it to the budget.

Select or existing budgets. Click and follow the prompts.

You can make additional adjustments on the budget worksheet, but don’t forget, the final step is to budgets to your subordinate managers.

Click to save your model without...
Now, we will give you instructions on how to export your worksheet to Excel if you choose to work offline.
Excel Export

You may complete planning for your employees in , or you can choose to .

The Manage in Spreadsheet function is a two-way process that allows you to export to Excel, make recommendations, and import back into Workforce Comp. All recommendations using this functionality is in local currency.

To use this feature, you must download and install the latest version of and configure Excel. If you are using Firefox and have an old version, it will prompt you to update to the new version. For detailed instructions on how to download and install please refer to the file posted on the website.
The next section will show you how to enter compensation ratings.
Compensation Rating

The Compensation Rating is used for the current Compensation plan only. It is not linked or tied, and will not feed back, to the official Talent Performance Rating.

- On the [ ], scroll until you see the [ ] column
- Use the [ ]

To rate your employees, open the [ ] from the [ ].

Please note that this is a Compensation rating only, it is NOT the official Talent Performance Review Rating.

Find the [ ] column.
Use the [ ]
Always Save any entry you make.

The requirements for entering compensation ratings is determined by Line of Business. Check with your manager if you are unsure of the process for your organization.
This section shows you how to make recommendations for employees.
Make Recommendations

View your Budget:

On the [image], click [image] to view your budget:

- [image] is for your entire organization, and stays the same regardless of the filter, highlighted in red; whereas, the [image] — Filtered by — changes with the value of the selected.

There are two places to view your budget. The first option is on your [image], shown in green, is for your entire organization, and it stays the same regardless of the filter, highlighted in red; whereas, the [image] — Filtered by — shown in blue, changes with the value of the selected.
The more accurate and **recommended** way to view your budget versus spend is on the [tab]

- From the [tab], select [tab]
- The screen should default to the [tab]

The other, more accurate, way to view your budget is on the [tab] - this is the recommended option.

From the [tab], select [tab] will show your budget versus spend information.
You also have two methods to enter recommendations for employees. The first option is to enter recommendations directly into the tool.

You can make bonus recommendations as either an AMOUNT or a PERCENTAGE of eligible salary. After making entries, please remember to save your work.

Please do not submit your recommendations until all of your subordinate managers have completed their recommendations. Submit will remove their access, and all managers below you won't be able to make any changes to their recommendations.

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

Entering Recommendations:

- Click the [icon] on the pop-up, and log in with your [username].
- If the [file] is successfully downloaded, verify the [column] has no background color and recommendations can be entered. All offline amounts entered in the spreadsheet are in local currency.

The second option is to export to an [Excel], and [PDF]

- To do this, click the [icon] to start the export process.
- In the [Excel], click [File] and log in using your [username].
- A successful download will contain [Excel].
- Verify the "[column]" column has no background color and changes can be entered. Please note, all offline amounts entered in the spreadsheet are in local currency, other options are not available.
Once manager recommendations are complete, you will need to

In ____,

- **Click** the button in the __ tab of the toolbar
- **On the** __, **click** for the default
- **The** __ will start to process
- **It** is complete when you see the __ that indicates
- **Click** and __ to (**___**), to verify the rows **___** successfully.

* In Workforce Compensation:
  - Close and re-open the **___** or change a **___** to refresh the **___**, and verify your changes were **___**.

- **Click** and **___** to (**___**), in the spreadsheet to verify the **___** successfully.

In ____, close and re-open the ____ or change a ____ to refresh the worksheet and verify your changes were ____.
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, you can do this on the **[tab]** under the **[task]** and click **[button]**, respectively.

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.

Switch to the **[tab]** and select either **[option]** or **[option]** and type in your comments in the pop-up box.
You can review the status of your subordinate managers from the tab. Shown here are the seven possible statuses. Recommendations should only be communicated to employees when the status is.
Use the tab to approve your subordinate managers’ submissions, either individually or all at once by clicking the and selecting an option.

To approve individual managers, select a or use the then choose Choosing All Managers will approve your entire hierarchy.

After approving, you can verify your approval in the Approval Status column – it should list your name.
Review, Approve and Submit
Submit: Warning

Do NOT submit until your subordinate managers have completed their submission to you

Submit only when your entire organization has completed their recommendations. There is no way to do this automatically.
Review, Approve and Submit

Submit

When you [redacted] you are [redacted].

Do not communicate recommendations until you receive notification that [redacted] has obtained final approval.

Always verify [redacted] before you communicate to employees to ensure that the final recommendations have not changed.

The [redacted] button can be found in the [redacted].

When you [redacted] you are [redacted].

Once you have completed this step, you are done with the recommendation process.

Please remember: do not communicate any recommendations until you receive notification from [redacted] through your manager or HR manager.

Once final approval has been obtained, the [redacted].

Adjustments can sometimes happen during the approval process, so always check [redacted] before communicating recommendations to your employees.
In this last section, we will share some helpful tips when using the Workforce Compensation tool and resources to help answer your questions.
As mentioned earlier, Firefox is the preferred browser. Be sure to use the latest version of Firefox, which can be downloaded from MyDesktop.

If Firefox is not available, other browsers such as Chrome and IE can be used, but there are known issues, such as using Chrome on top of Windows 10.
Managers can now personalize their layout of the Compensation Worksheet.

You can save this layout for the next time you access your Worksheet or you can Restore the default layout on this screen.
Workforce Comp Tips

Save Icon

- **Save Icon**
  - Move fields around on the Worksheet
    - Highlight and drag-and-drop individual columns, or
    - Click View > Columns > Manage Columns to hide, unhide and re-arrange all columns
  - Click the **Save** icon, to keep this view for the next time you access your Worksheet.

Managers can also add, remove and move fields around on the Worksheet and save your view for the next time you access your Worksheet.

Either drag-and-drop columns or use the **Manage Columns** menu to add, remove and re-arrange the order of columns.

Once done, click the **Save** icon, highlighted in yellow, to save your Worksheet view.
If your screen is small, you may 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, highlighted in yellow to expand your options.
Workforce Comp Tips

Currency Switcher

• Budgets: Always in USD

• Planning: Local Currency vs. USD
  – Manually in the tool: Recommendations can be made in local currency or USD, depending on the Currency switcher, located in the upper right hand corner next to the Save and Close button. The default is Local Currency.

  – Manage in Spreadsheet download and upload: Recommendations are always in local currency.

In Workforce Compensation, budgets are always shown in USD.

However, recommendations for employees can be made in local currency or USD, depending on the selection of the Currency Switcher, located in the upper right hand corner next to the Save button. The default is local currency. If a manager does not change this before entering recommendations, the amounts entered are in local currency.

If the Manage in Spreadsheet function is used to download and upload, recommendations are always in local currency.
All people managers will be automatically assigned the OIM entitlement to use Workforce Compensation. If a manager is experiencing access issues, please have them log a MyHelp - Compensation ticket.
Questions about your organization’s timeline and budgets for this process should be directed to your manager and/or HR Manager.

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

Submit questions on Workforce Compensation access and functionality to MyHelp - Compensation at the link listed.

These training slides, along with the OTube videos and eligibility document will be available on the Workforce Compensation website.
This concludes our training on Workforce Compensation.
Let’s go ahead and open it up for any questions.
Thank you for your time and participation in Oracle’s global compensation programs.