Annual Non-Sales Focal Program and Workforce Compensation

Manager Training

Oracle Compensation
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
Annual Focal Program

General Information

• Tools
  – All managers will use the new Workforce Compensation (WC) tool to enter focal 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
  – WC Modeling feature is available to assist in pushing down budgets based on specific criteria
Annual Focal Program

General Information

• Eligibility
  – Review the eligibility document posted on the Workforce Compensation website
  – Be sure your employee population is reflected correctly on your WC worksheet
    • Not all employees are eligible for the annual non-sales focal program

• Communication
  – **Do not** communicate recommendations until you receive notification from Corporate Compensation that approval has been obtained
  – Always check WC **before** you communicate to ensure that the final recommendations have not changed
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
  - 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 WC
Workforce Compensation

Login

1. From MyOracle Employee Tools, click ‘Enterprise Apps’

2. Select ‘Fusion Applications – Financials And HCM’

3. Log on with your SSO credentials

4. In Navigator, select Manager Resources > Workforce Compensation

NOTE: Your menu options may differ from what is shown here, depending on your Access level
Workforce Compensation
Landing Page – Tasks and Plans/Pools

• **Tasks** has sections for **Compensate Workforce** (1a) & **Manage Budgets** (1b)
  – Below the headers are the **Plan** (2a) and **Pool** (2b) links which open their specific worksheets

• **Compensate Workforce** (3a) is the default display from the Navigator > Workforce Compensation link
  – Click the **Manage Budgets** header (1b) to go to **Budget Pools** (3b)
  – The **Manager drop down** (4) lets you view your subordinate managers worksheets
Workforce Compensation

Budget Allocation
Budget Allocation

• Go to Tasks > Manage Budgets and click either link for the budget pool worksheet

• The initial time the budget is selected, you must choose a budget method. Your selection will affect the budget access settings of subordinate managers

• Selecting the 2nd or 3rd option allows you to adjust the budget access level settings of subordinate managers if desired
Budget Allocation

• Enter budget amounts in the New Budget: Budget Distribution Amount column
  – The Direct Reports row is the budget for recommendations to your direct reports

• You must publish the Budgets so subordinate managers can see their budgets
  – Click the drop-down arrow next to the Publish icon & select an option
  – If publishing budgets to only a few managers, highlight individual rows and use “Publish Selected Budgets”
Workforce Compensation

Budget Modeling
Budget Modeling

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

• Who might create Models –
  – Managers who intend to pass down budgets to subordinate managers
  – Managers who intend to make the allocations themselves (hold the entire budget)
  – Different models can be created, previewed and applied before publishing the budget

NOTES:
- 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 Manager Budgets worksheet, click the drop-down arrow next to the Model icon and select ‘Create Model’

- Enter the Model information and click Continue
Create a Budget Model

Model Properties

1. Choose an Allocation Method from the drop-down list
2. Select up to four Criteria from the drop-downs
   Note: Criteria 3 and 4 will not appear until the first two are entered
3. Click ‘Build Model’
Create a Budget Model

Model Details

• Enter amounts in the **Model Values** section to calculate and reduce the **Available Budget** accordingly
  – Click the arrows to expand or collapse the levels
  – Use the inner scroll bar to view the entire list

Click ‘Preview Model Results’
Create a Budget Model

Preview Model Results

• The **Summary** displays the number of employees & budget data

• Two other tabs:
  – **Worker Detail** (the default view)
  – **Manager Rollup** (shows budget by subordinate manager)
Create a Budget Model

- Click **Done** to return to the Workforce Compensation landing page
  
  ![Preview Model Results](image)

  Click **Return to Model** to return to the model properties.

- **Optional:**
  - If you have **NOT** published the budget yet, you can apply the results of your model

  **NOTE:** Applying a Model will overwrite any previously entered awards
  - Click the arrow next to the **Apply Results** button
  - Choose **Apply to Budget Amounts** from the drop-down list
  - Go to the Budget worksheet and confirm the model amounts have been applied

  ![Preview Model Results](image)

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

Excel Export
Excel Export

• **Manage in Spreadsheet** (Export/Import feature) is a two-way process for spreadsheet download and upload, which requires:
  – Download and installation of ADF Desktop Integration
  – Configuration of Excel

• For detailed instructions, please refer to the “WC ADFdi Installation Instructions.docx” posted on the Workforce Compensation website: http://my.oracle.com/site/hr/global_compensation/fwc/

**NOTE**: You must download and install the latest version of ADF Desktop Integration, which became available on May 4, 2015. Please uninstall any old versions and install the new version.
Workforce Compensation
Rate Employees
Rate Employees

• From the WC landing page, click either link to open the worksheet for the Compensate Workforce plan
• On the Compensate Workforce worksheet, scroll until you see the Rating column
• Use the drop-down to select the appropriate rating

*Note: The actual location of the Performance Rating column may vary, and you can customize your worksheet view by moving, adding or removing columns.
Workforce Compensation
Make Recommendations
Make Recommendation

View your Budget: Option 1 – Worksheet View

• If you do not see your Budget information on your Compensate Workforce worksheet, check the Team filter.
  
  ![Worksheet Image]

  1. If you do not see your Budget information on your Compensate Workforce worksheet, check the Team filter.
  2. Select ‘All’ from the drop-down and click the arrow to the right of Team, your budget amounts should now display.

  ![Worksheet Image]

  3. Select ‘All’ from the drop-down and click the arrow to the right of Team, your budget amounts should now display.
  4. Your budget amounts should now display.
Make Recommendation

View your Budget: Option 2 – Approvals Tab

• Another way to view your budget is from the Approvals tab. Click the **Compensation Overview** link and scroll to the right to see the budget information.
Make Recommendation

Entering Recommendations: Option 1 - Directly into WC

• Enter job changes into the **Proposed Job** and **Proposed Discretionary Title** columns

• Enter salary changes into the **Salary Increase Amount (LC)** or **Percentage of Eligible Salary** columns. The other column will auto-calculate

• 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.
Make Recommendation

Entering Recommendations: Option 2a – Excel Export to Work Offline

- Click the **Manage in Spreadsheet** icon
- Click “Yes” on the **Connect** pop-up. You will need to log in using your SSO credentials
- If your downloaded file has no data, then your download was unsuccessful
- A **successfully downloaded file** will have ‘Download Again’ and ‘Upload’ buttons that are activated and employees listed starting on row 7
- Verify the **Proposed Job**, **Proposed Discretionary Title** and **Salary Increase Amount (LC)** columns have no background color and recommendations can be entered

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- **Download Again**
- **Upload**

![Excel Spreadsheet](image)
Make Recommendation

Entering Recommendations: Option 2b – Excel Upload to WC

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

• In Excel:
  – Click the **Upload** button and click **OK** to select the default **Upload Options**
  – The upload will process
  – Upload is complete when you see the **Invoke Action** pop-up that says “Worksheet was uploaded”
  – Click **OK** and scroll to column D to verify the rows updated successfully

• In WC:
  – Click the plan link to refresh the Worksheet and verify your changes were uploaded
Workforce Compensation
Review, Approve and Submit
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 manager’s row and click **Return for Correction** or **Request Information** respectively.

**Return for Correction**

Enter a Comment explaining the issue the manager must correct

**Request Information**

Enter a Comment asking for the needed detail
Review, Approve and Submit

Review: Worksheet Status

• On the **Approvals** tab, you can see your Approval Status and the Status of your subordinate managers:

• Click the **Team Status** or **Action History** icons for more information
Review, Approve and Submit

Approve

• Approve your subordinate managers’ submissions via the Approvals tab. Click the drop-down arrow to the right of Approve and make a selection:
  – **Selected Managers**: First select a single manager or use the Ctrl key to select multiple managers. Then choose ‘Selected Managers’ from the Approve drop-down.
  – **All Managers**: Approves your entire hierarchy.

• Verify your subordinate managers’ Approval Status shows “Approved by <your name>”
Review, Approve and Submit

Submit: Warning

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

When you submit, you are submitting your entire organization.

If you submit before everyone has completed their work, you must manually change the update status for every affected manager.
Review, Approve and Submit
Submit: Option 1 – Compensate Workforce Worksheet

• On the Compensate Workforce Worksheet, click the **Submit** button in the upper right corner

**NOTE**: When you Submit, you are submitting your **entire organization**.
Review, Approve and Submit

Submit: Option 2 – Compensate Workforce Landing Page

- On the Compensation Workforce > Primary Managed Plans page, click the Take Action drop-down and select Submit for approval

At this point you are finished with the process

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

Always verify in WC before you communicate to employees to ensure that the final recommendations have not changed
Workforce Compensation
Tips and Resources
WC Tips

Browsers

• 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
WC Tips

Collapsible Panes and Expand Arrows

To see more fields without scrolling or if the Team filter is not visible:

1. To gain more work space, click on the left-pointing arrow to collapse the Tasks pane.
2. To show hidden filters, click on the double right-pointing arrows to expand the Worksheet options
WC Tips

Nested Scroll Bars

- WC 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
WC Resources

Contacts & WC Website

• Questions about:
  – **Timeline and Budget** for your organization: Contact your manager or HR Manager
  – **Eligibility**: Contact your HR Manager

• For more detailed information, please refer to the Workforce Compensation website: [http://my.oracle.com/site/hr/global_compensation/fwc/](http://my.oracle.com/site/hr/global_compensation/fwc/)
Questions