Global Corporate Bonus Process and Fusion Workforce Compensation

Manager Training

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Agenda

1. Global Corporate Bonus Process
   - Fusion Workforce Compensation Pilot
   - General Info

2. Fusion Workforce Compensation
   - How to Access and Use FWC to
     - Allocate and Model a Budget
     - Rank / Rate Employees
     - Work with Excel
     - Award Bonuses
     - Review Subordinate Mgr’s Recommendations
     - Submit to Next Level

3. Fusion Tips

4. Tools and Resources
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 be used by organizations not included in the pilot
Global Corporate Bonus Process

General Info

Timelines
- FWC will be open to managers on approximately 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
Global Corporate Bonus Process

General Info (cont'd)

Eligibility
- Review the eligibility document posted on the Fusion Workforce Compensation web site and be sure your employee population is reflected correctly on your FWC worksheet (FWC url: http://my.oracle.com/site/hr/global_compensation/fwc/)
  - Remember not all employees are eligible for the Global Corp Bonus process

Communication
- Do not communicate a bonus until final approval is obtained
- Always check FWC before you communicate to ensure that the bonus amounts haven’t changed
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 for further analysis
- View submission status of subordinate managers

Note: Firefox is the preferred browser for Fusion applications
How to Access FWC

3. Log on using your SSO credentials

![Sign In Form]

- Username: first.last@oracle.com
- Password: [redacted]

Lost your password?
Workforce Compensation

The Workforce Compensation landing page
Bonus Tasks

1. Allocate Budget / Budget Modeling
2. Rank / Rate Employees
3. Work with Excel
4. Award bonus
5. Review Subordinate Mgr’s Recommendations
6. Submit to Next Level
Budget Allocation
Allocate Budget

Go to [insert URL] and click either link for the budget pool worksheet.

The first time the budget is selected you must [insert details].

Your selection will [insert details].
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 see budgets.

Click the if publishing budgets to only a few managers.
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, or
  - Managers who intend to make the allocations themselves (holding the entire budget)

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

NOTE: Applying a Model will overwrite any previously entered bonus amounts

Models should never be applied after the budget has been published
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
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.
Create a Budget Model

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

Click [redacted] to return to the [redacted] landing page

Optional:
If you have [redacted] you can [redacted]

Models should never be applied after the budget has been published
Rate and Rank Employees
Rank/Rate Employees

From the [redacted] page, click either link to open the worksheet for the [redacted].

On the [redacted] page, [redacted].
Excel Export
Excel Export

Export the Compensate Workforce worksheet to Excel -

Export – Is a two-way process for [redacted]

- Requires download and installation of the [redacted]
- Configuration of Excel
- The exported file will be a macro based file

NOTE: You must download the [redacted] each year to ensure you have the most recent version.
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 [ ]

3. Go to your computer's Control Panel > Programs and Features page and verify the [ ] has been installed
Configure Excel when using [Redacted]

After installing the [Redacted], verify the [Redacted] 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. [Redacted]
6. Under [Redacted]
7. [Redacted]
8. Under Excel Options, click Add-Ins and verify [Redacted] is in the ‘Active Application Add-ins’ list.

If the [Redacted] 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 [Redacted] and 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 [Redacted] and click OK to enable the add-in.
7. Under Excel Options, click Add-Ins and verify [Redacted] is in the Active Application Add-ins.
8. Under Excel Options, click Trust Center, and click Add-ins (Note: This add-ins area is different 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).
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.
Award Bonuses
Award Bonus: View Your Budget
Award Bonus: View Your Budget

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

Enter bonus amounts directly in the [redacted] area.

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.
Award Bonus:

1. Click the [ ] icon on the [ ] header
2. Click Yes on the [ ] pop up. You will need to log in using your SSO credentials
3. Once the [ ] file is populated, 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":

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.

ORACLE
Review, Approve, and Submit
Review

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

Enter a Comment explaining the issue the manager must correct

Enter a Comment asking for the needed detail
Review

From the [blank] you can see your Approval status and the status of your subordinate managers:
Approve

Approve your subordinate managers' submissions via the [drop down arrow] and make a selection:
Submit Warning

As noted earlier – DO NOT submit until your subordinate managers have completed their submission to you.
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.
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
Fusion Tips
Collapsible Panes

• Gain more working space by collapsing panes where possible
• Need more space to see your Worksheet?
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, the horizontal scroll bar was out of sight

* By using the **vertical** scroll bar, the horizontal scroll bar was revealed
Tools and Resources

Questions about -

- **Timeline and Budget** for your organization: Contact your manager or HR Manager
- **Eligibility**: Contact your HR Manager
- **Fusion Workforce Compensation access and functionality**: Email: fusion-comp_ww@oracle.com

**Fusion Workforce Compensation web site:**
Questions