Global Corporate Bonus Process and Fusion Workforce Compensation

Manager Training

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Deposition Exhibit 39
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Date: July 26, 2018
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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**

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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 used by organizations not included in the pilot

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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

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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

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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

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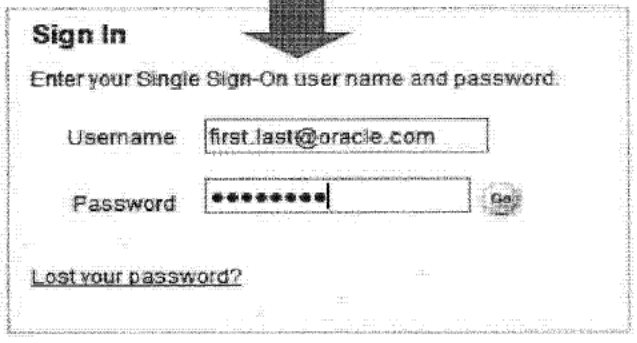
How to Access FWC

[redacted]

3. Log on using your SSO credentials



[redacted]

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Workforce Compensation

The Workforce Compensation landing page [redacted]

[redacted]

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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

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Budget Allocation

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Allocate Budget

Go to [redacted] and click either link for the budget pool worksheet

[redacted]

The first time the budget is selected you must [redacted]
Your selection will [redacted]

[redacted]

[redacted]

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Allocate Budget

Enter budget amounts in the New Budget Distribution Amount column

The "[redacted]" row is your budget for **bonus awards to your direct reports**

[redacted]

You must [redacted] the Budgets so subordinate managers can see budgets

Click the [redacted]

If publishing budgets to only a few managers, [redacted]

[redacted]

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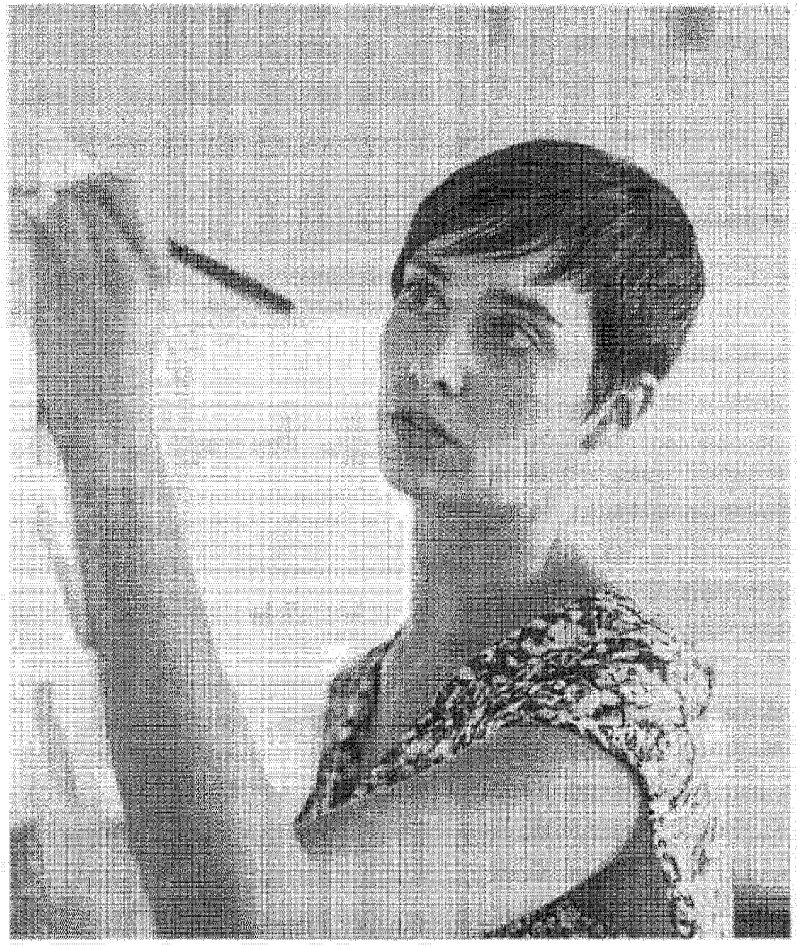
Budget Modeling



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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

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Create a Budget Model

On the [redacted]

Select [redacted]

Enter the [redacted]

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Create a Budget Model

1. Under [redacted] from the drop down list
2. Select up to [redacted]
   Note: [redacted]
3. Click [redacted]

[redacted]

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Create a Budget Model

Model Details will appear below the [redacted]

Click the arrows [redacted]

Use the [redacted]

Enter an amount in the [redacted]

Example: You enter 5 and 10 in the [redacted] as shown below.
The available budget is reduced by 25,000.

[redacted]

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Create a Budget Model

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

[redacted]

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Create a Budget Model

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

[redacted]

Optional:

If you have [redacted] you can [redacted]

[redacted]

[redacted]

Models should never be applied
<u>after the budget has been published</u>

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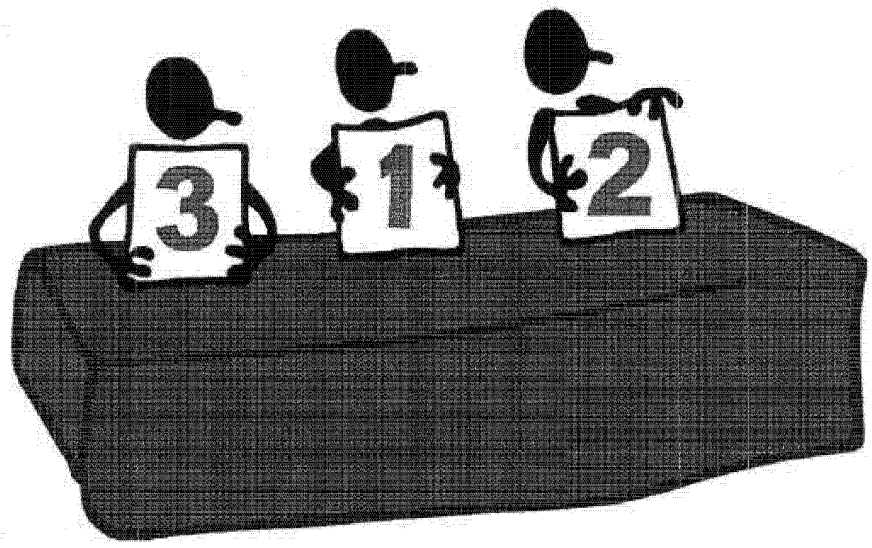
Rate and Rank Employees



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Rank/Rate Employees

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

[redacted]

On the [redacted]

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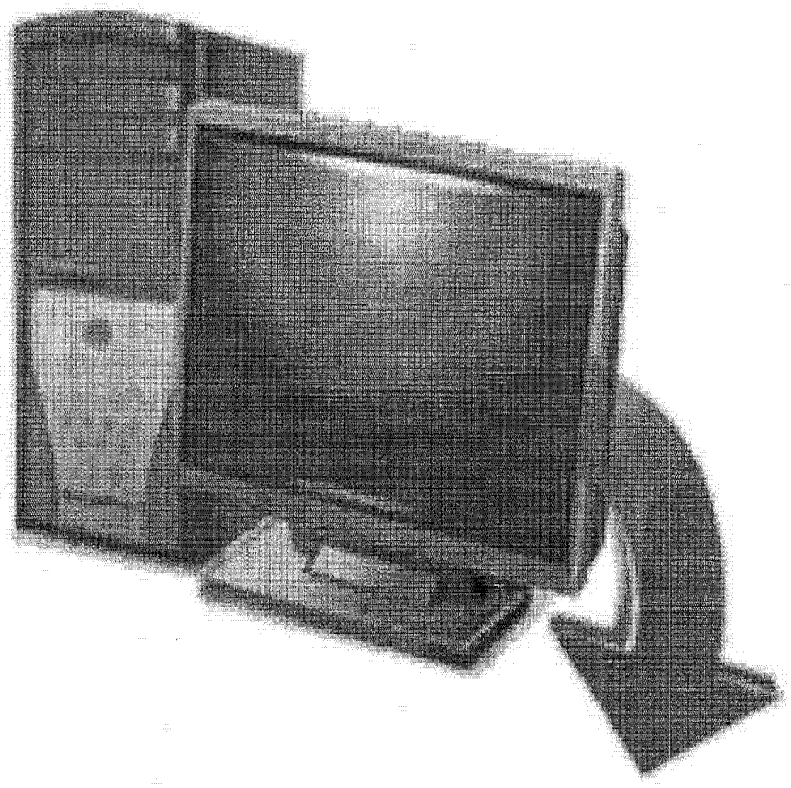
Excel Export



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Excel Export

Export the Compensate Workforce worksheet to Excel -

[redacted]

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.

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Excel Export

Installing the [redacted]

Each year, before using the [redacted], you must **download and install the** [redacted] This will ensure you have the latest [redacted] version.

1. Go to **Navigator →Tools →** [redacted]
   Click the link and download the .exe file to your desktop.

2. Double click the setup.exe file to install the [redacted] **setup.exe**

3. Go to your computer's Control Panel > Programs and Features page and verify the [redacted] has been installed

[redacted]

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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. Click [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] <u>**is not**</u> 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] 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 <u>different</u> 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)*).

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Configure IE when using [redacted]

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.

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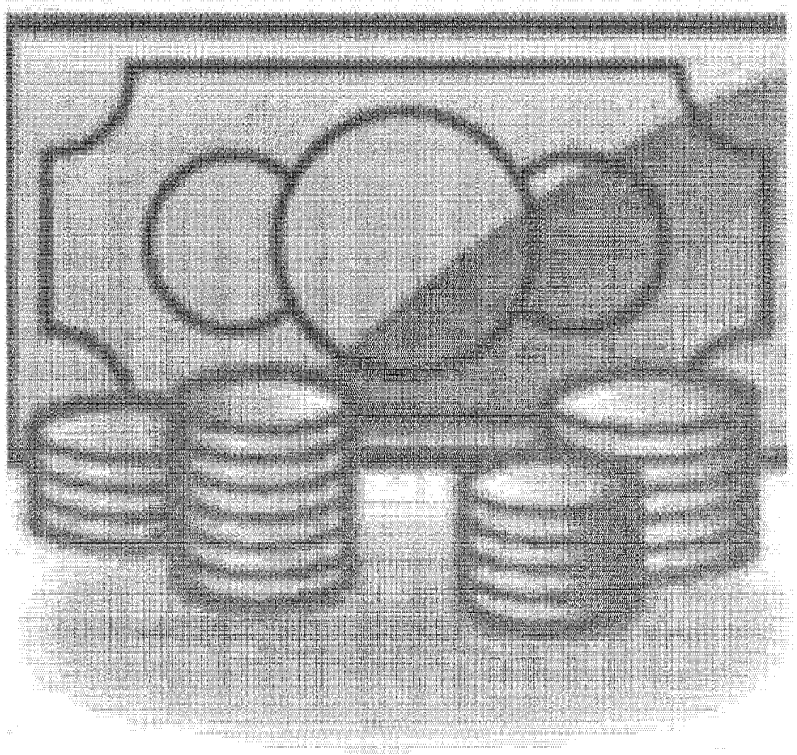
Award Bonuses



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Award Bonus: View Your Budget

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Award Bonus: View Your Budget

Method 2: Another way to view your budget is from the [redacted]
Click the [redacted] link and scroll to the right to see the budget information.

[redacted]

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Award Bonus: Entering Bonus Amounts

Enter bonus amounts directly in the [redacted]

Enter either a '**Percentage of Eligible Salary**' or a '**Bonus Amount**'

After making entries, **save your work**

[redacted]

WARNING!

DO NOT SUBMIT until all your subordinate managers have submitted their work to you. Your submittal removes their Update access.

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Award Bonus: [redacted]

1. Click the [redacted] icon on the [redacted] header
2. Click Yes on the [redacted] pop up. You will need to log in using your SSO credentials
3. Once the [redacted], check that the employees have populated the file and the [redacted]
4. Verify the [redacted] has no background color
5. If your [redacted]

[redacted]

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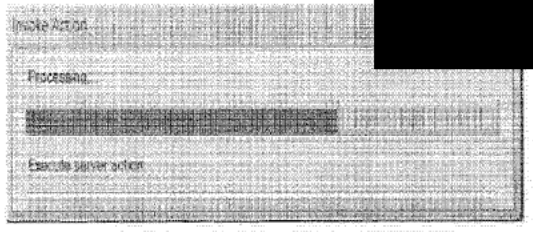
Award Bonus: Excel Upload

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

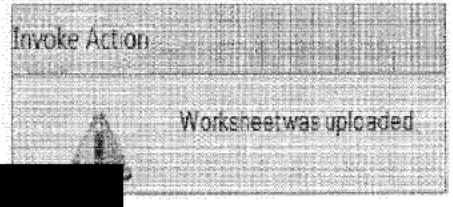
In the spreadsheet, click the Upload button and click OK for the default Upload Options:

[redacted]

The upload will process:



It is finished when you see the "Invoke Action" pop up that says "Worksheet was uploaded":



[redacted]

Click OK and scroll to [redacted] 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.

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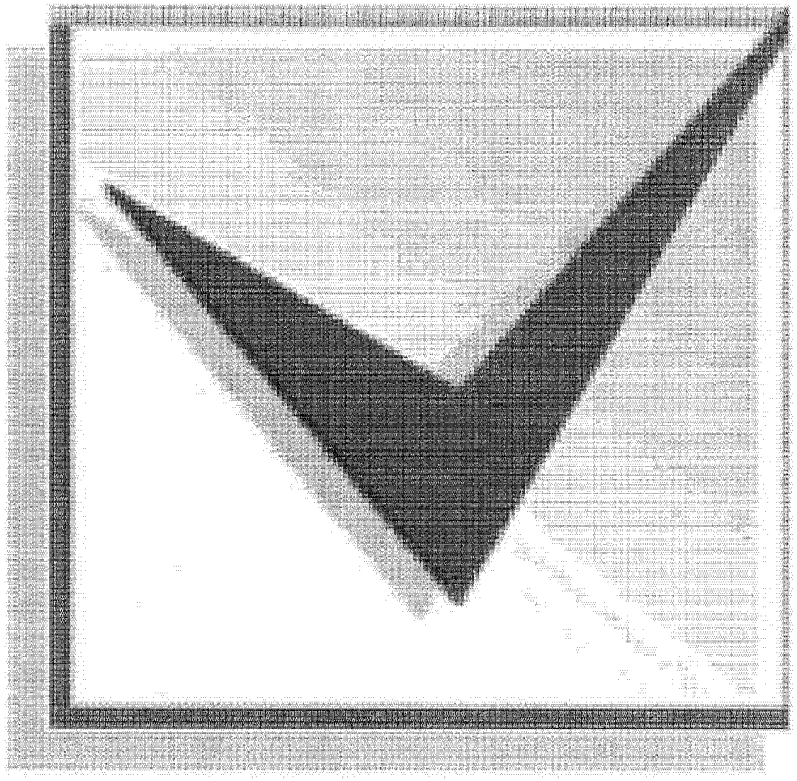
Review, Approve, and Submit



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Review

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

[redacted]

[redacted] Enter a Comment explaining the issue the manager must correct

[redacted]

[redacted] Enter a Comment asking for the needed detail

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Review

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

[redacted]

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Approve

Approve your subordinate managers' submissions via the [redacted]. Click the drop down arrow to the [redacted] and make a selection:

[redacted]

[redacted]

[redacted]

[redacted]

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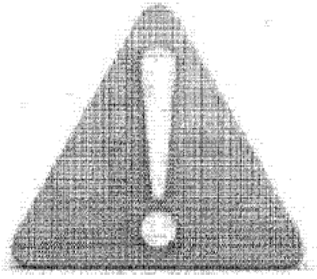
Submit Warning



As noted earlier – **DO NOT submit until your subordinate managers have completed their submission to you**

[redacted]

[redacted]

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Submit to Next Level

There are two ways to submit for approval to your manager

NOTE: [redacted]

[redacted]

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Submit to Next Level

[redacted]

Do not communicate any changes until the 'Last Approval Action' shows "Approved by Larry Ellison" [redacted]

Before communicating with employees, verify their awards to ensure you are providing the latest information

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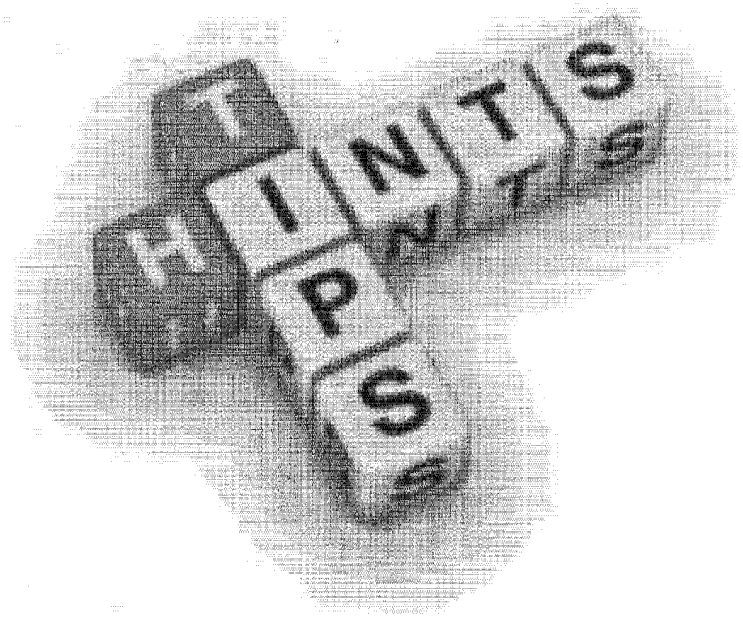
Fusion Tips



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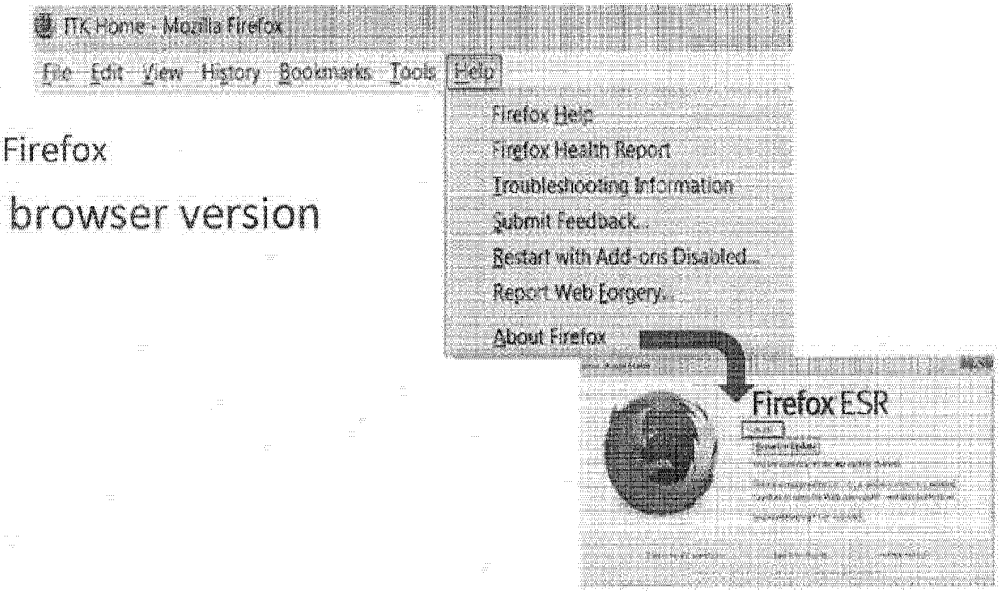
Fusion Tips
Which Browser to Use

- **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

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Fusion Tips

Collapsible Panes

- Gain more working space by collapsing panes where possible
- Need more space to see your Worksheet? [redacted]

[redacted]

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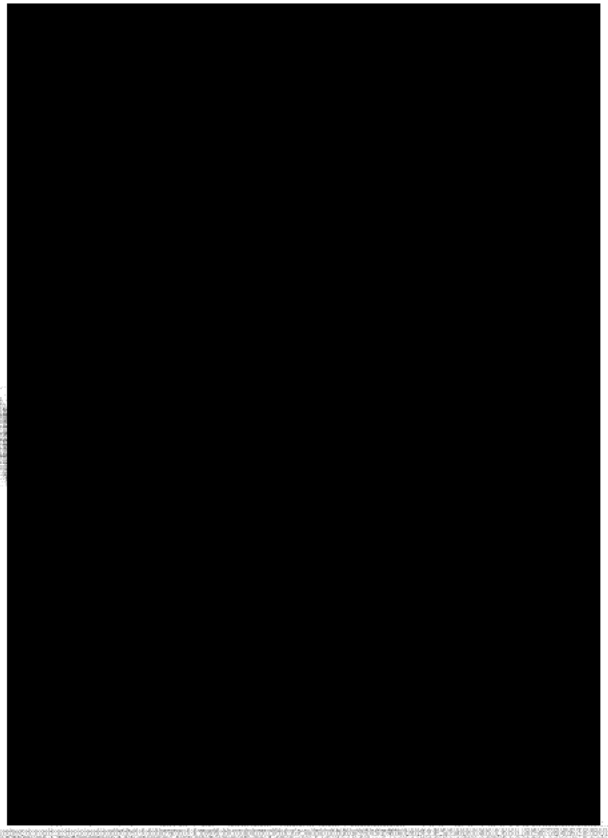
Fusion Tips
Nested Scroll Bars

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



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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:

[redacted]

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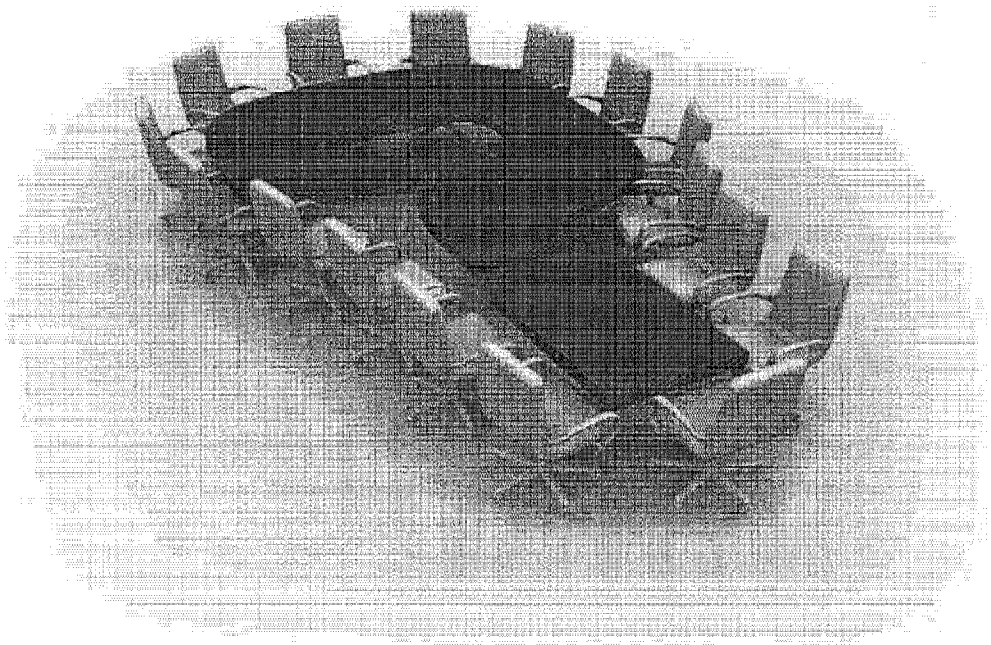
Questions



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