



**Fusion Workforce Compensation
Manager User Guide
Global Bonus Plan**

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Fusion Workforce Compensation Review – Key Points

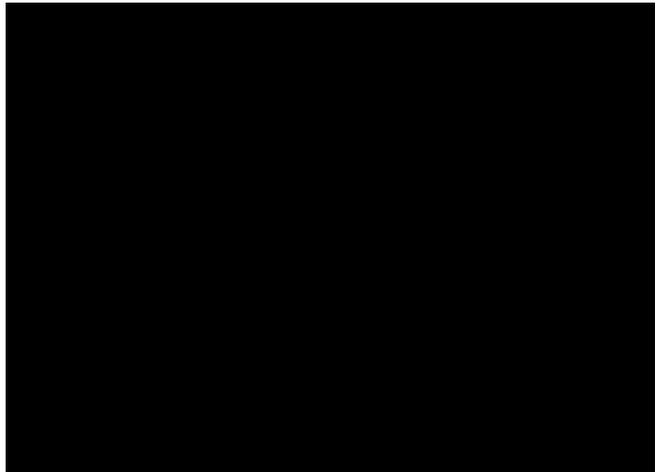
Purpose This document is intended to familiarize Managers with compensating workers and managing budgets using Fusion Workforce Compensation (FWC) for the Global Corporate Bonus program.

Special Requirements

Access: You must have a username, password and the application url before you can access the Fusion application. If working remotely you must be connected via VPN.

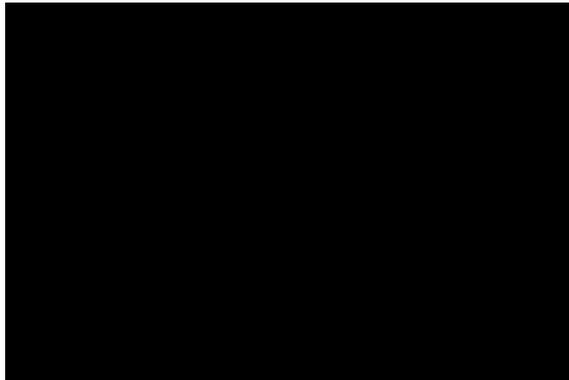
Browser: Preferred browser to ensure best application functionality is a current version of Firefox. Users may experience performance issues if using earlier versions of Firefox; some functionality may be lost if using Microsoft IE.

Exporting: Users must install the Oracle [REDACTED] before exporting worksheets to Excel spreadsheets. The FWC export function is a two-way process for [REDACTED] [REDACTED] Allocations can be made in an Excel spreadsheet and then [REDACTED] Remote workers must be connected via VPN. The link to download the Oracle [REDACTED] can be found under the [REDACTED]



! Important notes are indicated by a red exclamation point in the margin.

Accessing Fusion Workforce Compensation (FWC)



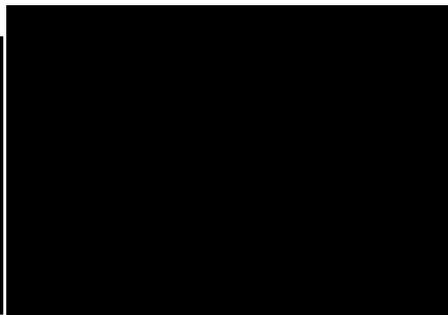
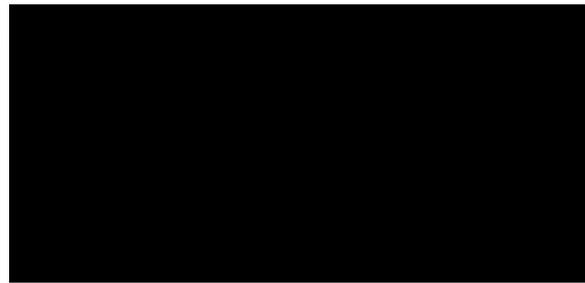
3. Log on using your SSO credentials

Sign In
Enter your Single Sign-On user name and password.

Username

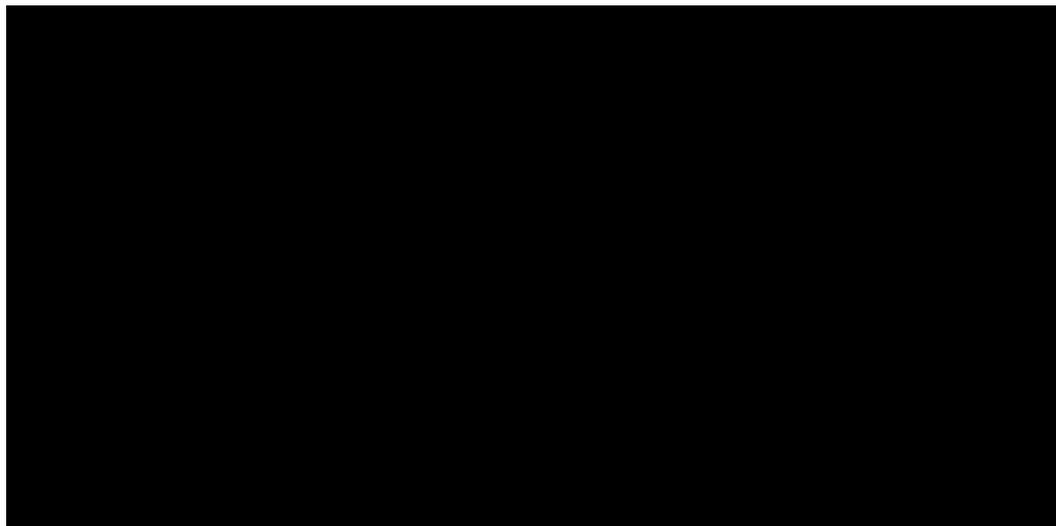
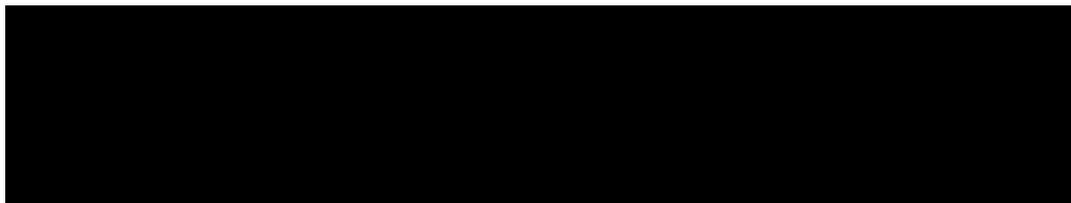
Password 

[Lost your password?](#)



Setting User Preferences

Users can change their default settings for Territory, Date Format, Time Format, Time Zone, Currency, Language, etc.

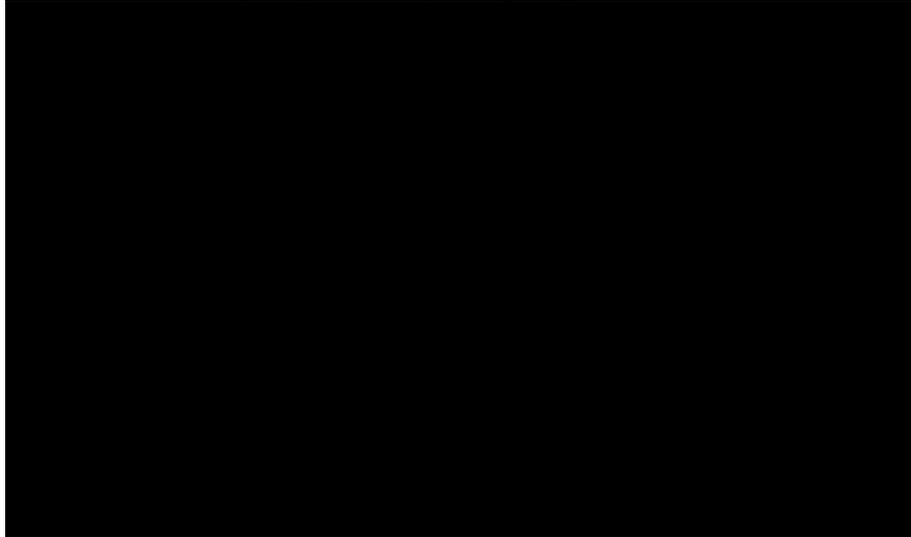


Navigation

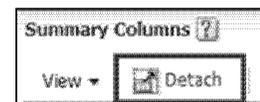
Workforce Compensation landing pages consist of two panes – [REDACTED]

The [REDACTED] lists the headers for [REDACTED]

1. Click the [REDACTED] header to view [REDACTED]. The Plan name links will open up the corresponding Comp Plan worksheets.
2. Click the [REDACTED]. The Budget Pool name links will open up the corresponding budget worksheets.

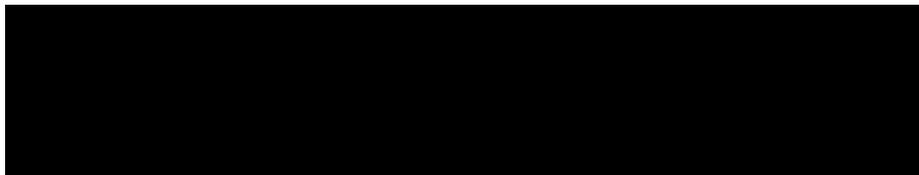


Detach: Worksheets can be detached allowing full screen view. Where available click the **Detach** icon in the toolbar to view the worksheet in full screen mode. Click the detach icon again to view in normal mode.

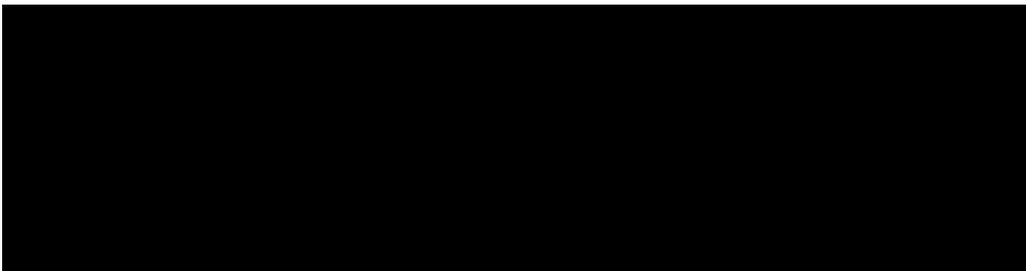


Data Refresh: Worksheet changes from uploaded spreadsheets or models may not appear until the worksheet is “refreshed”. Refresh worksheets by changing the view (e.g. navigate out and back to the worksheet).

Notifications: Notifications in FWC (e.g. [REDACTED]) can be seen by clicking the bell in the upper right corner of the screen or on the **Home** page.

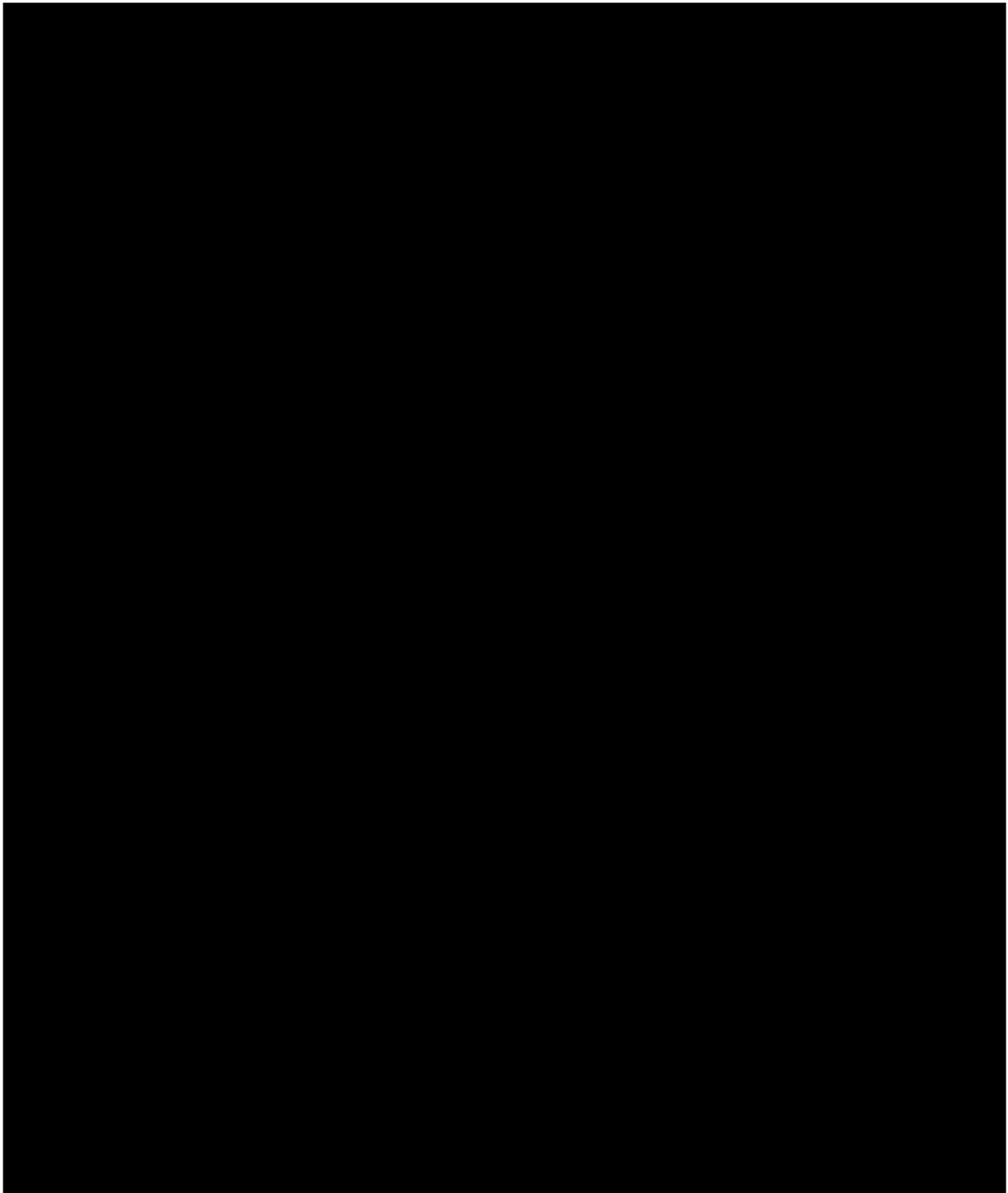


Reports:



Access Levels

Each compensation plan contains a Budget worksheet and a Compensate Workforce worksheet (Comp worksheet) and each requires proper access to view or take action. Managers whose access is set to [REDACTED] for a worksheet can set subordinate managers' access to that worksheet (e.g. A manager with [REDACTED] in the Budget worksheet can set the Budget worksheet access levels for their subordinate managers). Use the table below as a guide when determining subordinate managers' accesses. **Note:** Corporate Compensation sets the access levels for top level management.

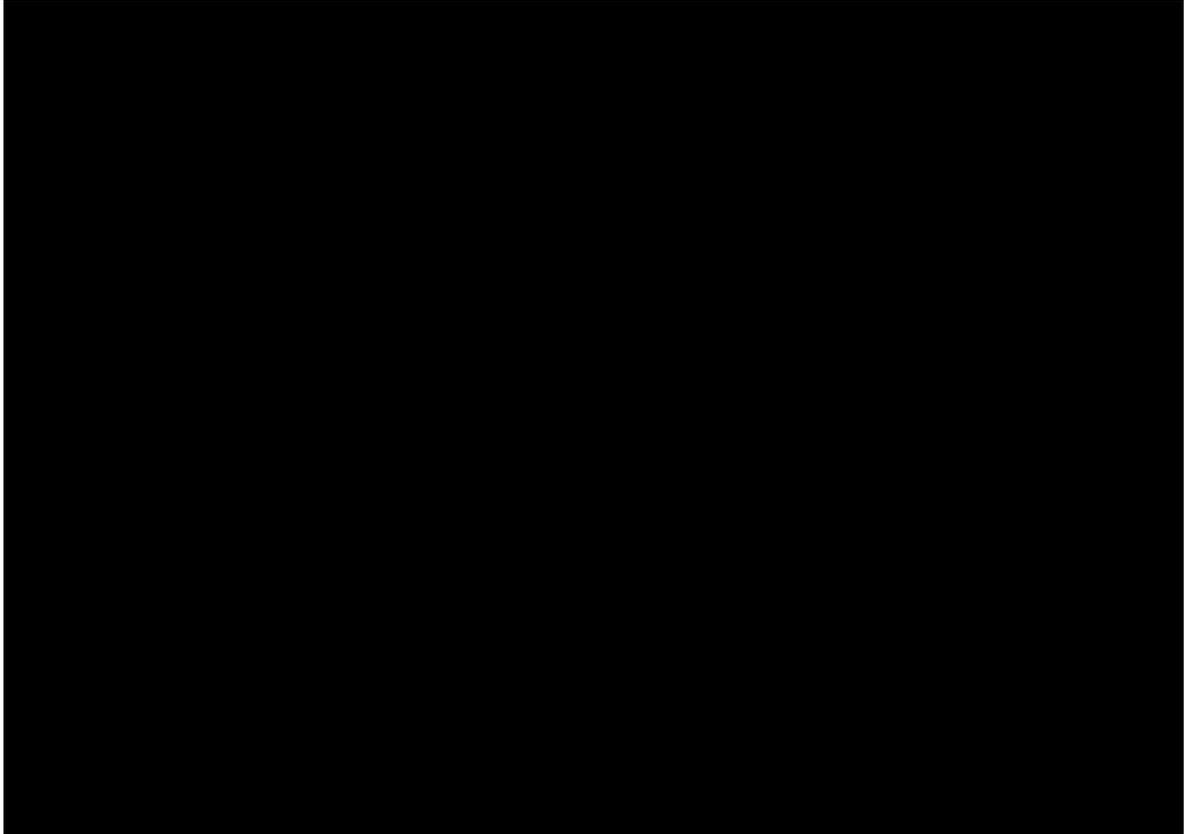


Managing Budgets

If a budget was not passed down to you, go to the [REDACTED] section.

- ! Managers can manage their own budget if their budget worksheet access level is [REDACTED] **a budget has been published for them**. This access allows managers to set aside a portion of their budget to allocate to their own direct reports, distribute (pass down) budgets to their subordinate managers and set subordinate managers' budget worksheet access levels.

Accessing the Budget Worksheet

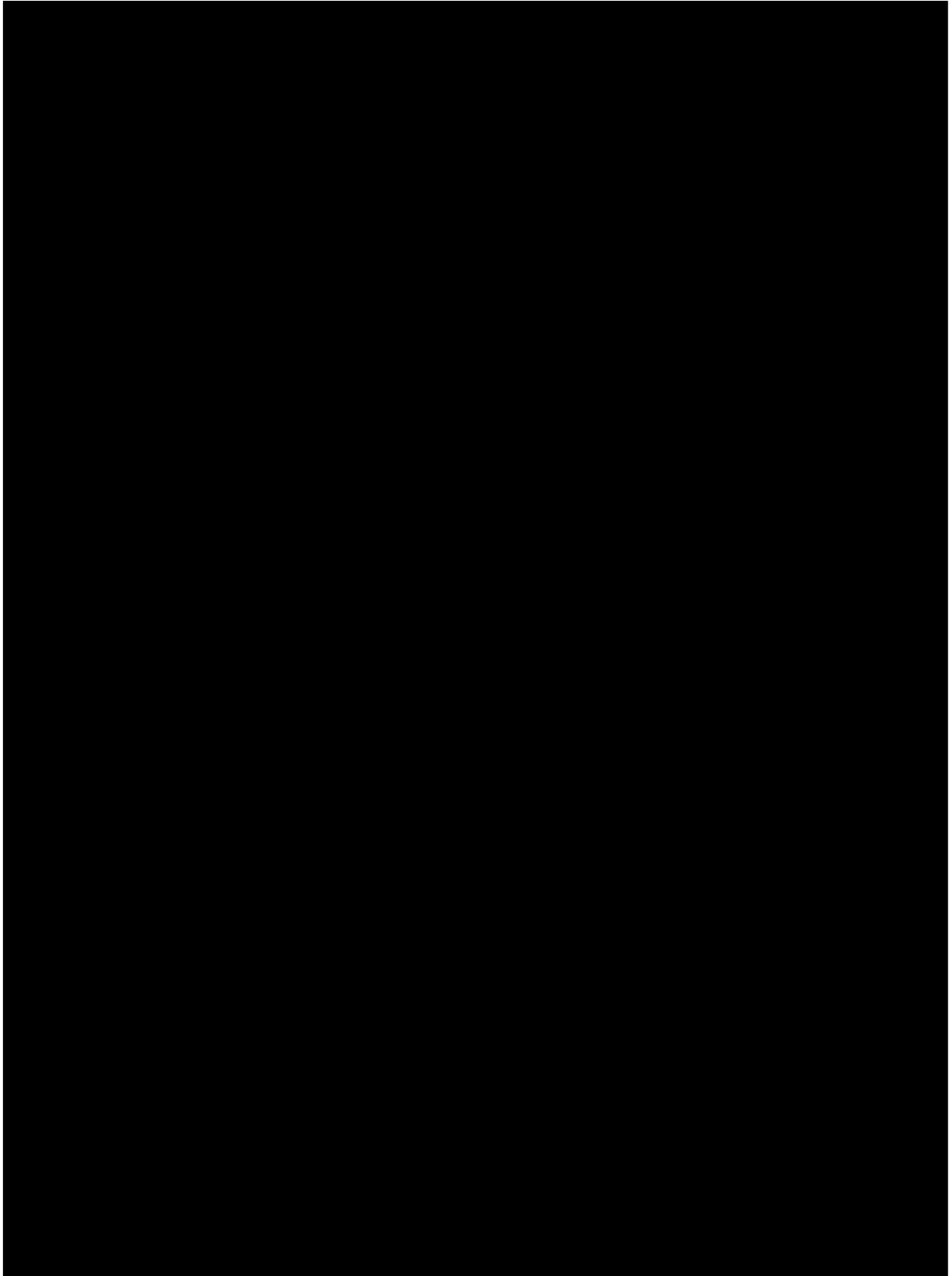


[REDACTED]
All subordinate managers will be set to [REDACTED] for the budget worksheet. Choose this option if you will make all allocation awards yourself.

[REDACTED]
Direct report managers without subordinate managers will be set to [REDACTED]. Direct report managers with subordinate managers will be set to [REDACTED]. Select this option if you will distribute and publish (pass down) budgets to any of your direct report managers with subordinate managers. Settings for specific managers can be adjusted in the budget worksheet.

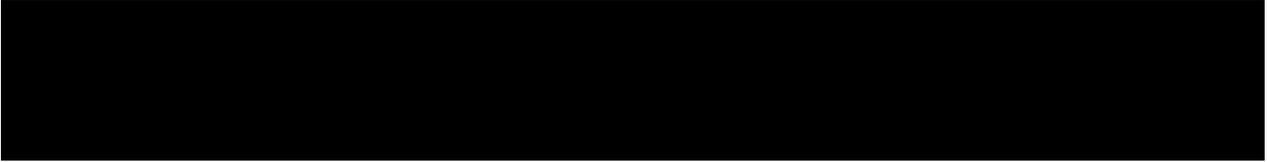
[REDACTED]
Budget access settings of all subordinate managers will be set to [REDACTED]. Select this option if you will directly distribute and publish (pass down) budgets to any of your direct reports' subordinate managers. Settings for specific managers can be adjusted in the budget worksheet.

If you choose to hold the entire amount of the budget go to the [REDACTED] section.



Budget Summary

The Budget Summary displays the budget pool name, currency, # of eligible workers, eligible salary, Overall Budget, Budget Distribution and Worker Allocation information. Columns can be rearranged by dragging and dropping the column headers.



! **Note:** The [redacted] is the total budget amount you have reserved for yourself and your subordinate managers but have not yet [redacted] for them to actually see in their worksheets.

Manager Budgets

Budgets and budget access levels for subordinate managers are set in the [redacted] section of the worksheet. Subordinate managers must have the [redacted] and the appropriate budget access level to perform any actions. The budget access levels of your subordinate managers are initially predetermined by the selection made when you first accessed your own budget worksheet. Refer to *'Accessing the Budget Worksheet'*.

Adjust Subordinate Managers' Budget Worksheet Access Level

1. Under the [redacted] section of the worksheet, choose the access levels for subordinate manager(s) in the [redacted] column ([redacted])



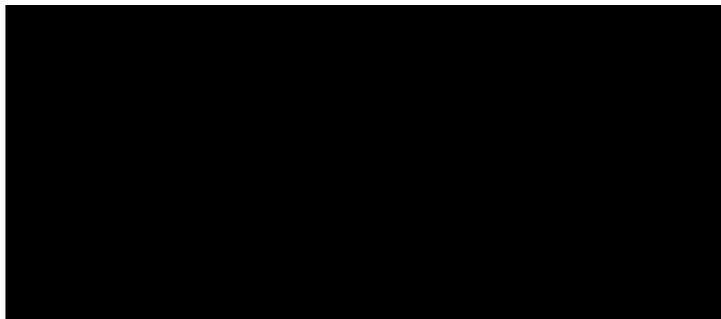
Budget worksheets are not available to this access level. It is strongly recommended to assign this access to subordinate managers who do not have subordinate managers reporting to them to ensure they cannot access the budget worksheet. Subordinate managers can view the published budget distributed to them in the Compensate Workforce worksheet.



Subordinate managers can distribute/pass down portions of their budget to their subordinate managers or hold the entire budget to allocate the shares to workers themselves. Budget worksheets are available to this access level.



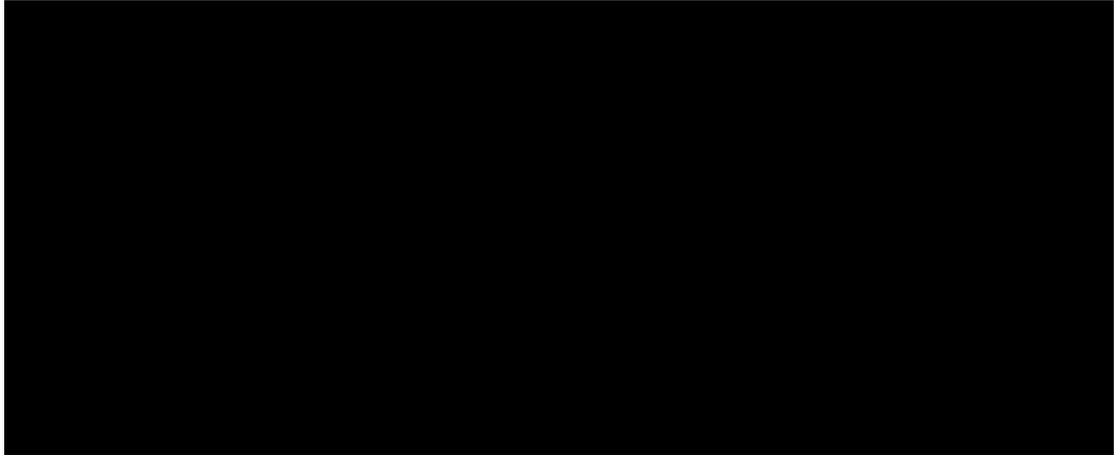
Subordinate managers can view their overall budget but cannot push budgets down with this access level.



Distributing Budgets

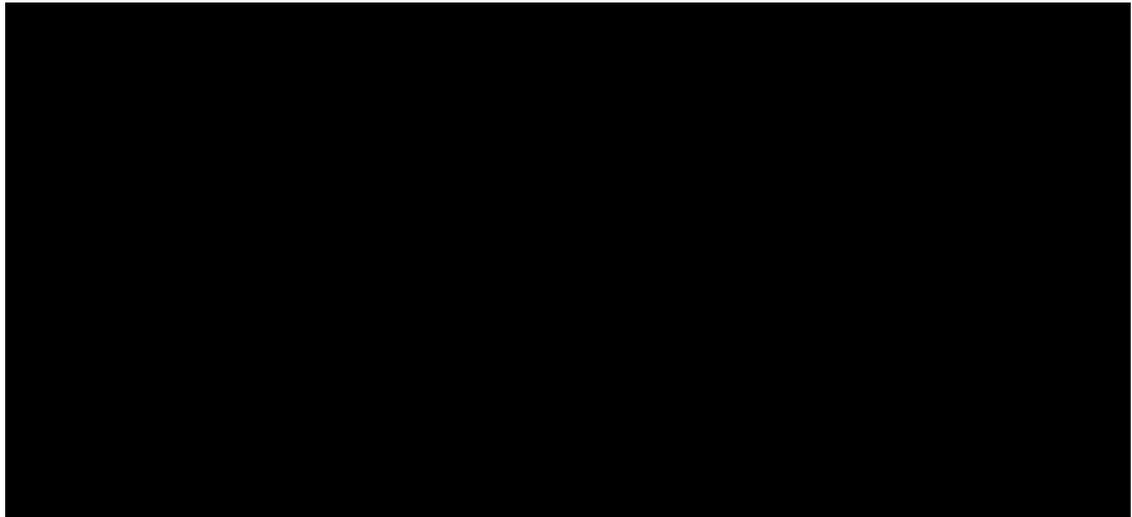
Budget distributions to subordinate managers can be managed by manually entering amounts in the [REDACTED] section of the budget worksheet, by creating and applying a budget model or by uploading the distributions from an exported Excel spreadsheet. Distributed budgets must be [REDACTED] before subordinate managers are able to view and/or manage their budget.

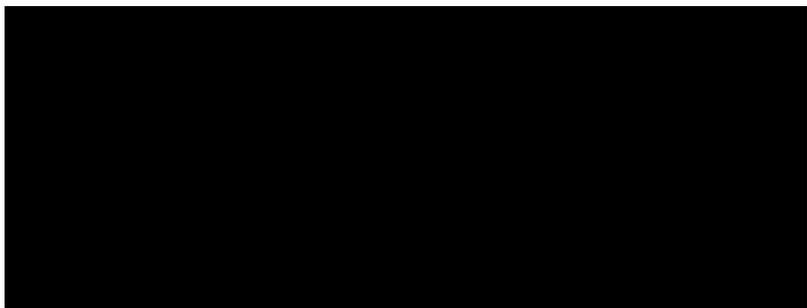
Manually Distributing Budgets



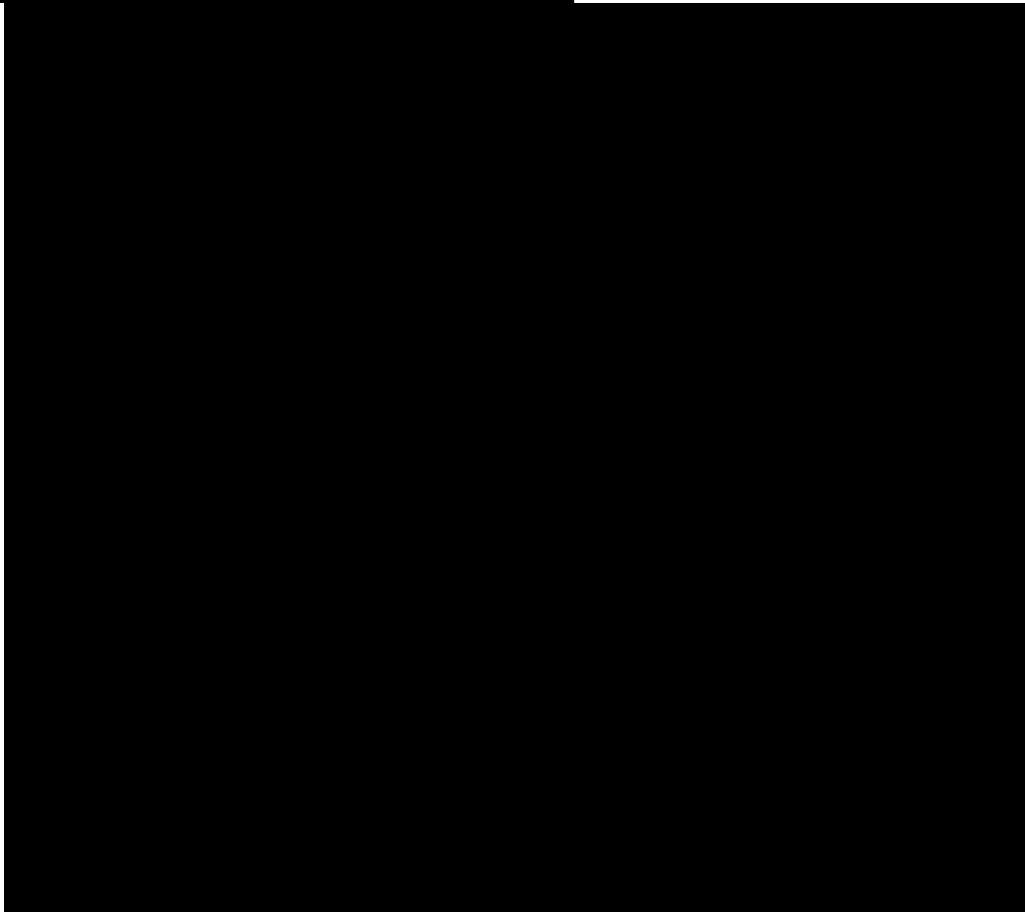
Creating and Applying a Budget Model

Models make it easy to see how different allocation methods and criteria affect your budget, worker allocation, and target amounts. They should only be created by managers who intend to pass down budgets to subordinate managers or by managers who intend to make the allocations themselves (hold entire budget). Many different models can be created, previewed and applied **before** publishing the budget to subordinate managers. **Models should never be applied to budget after the budget has been published.**

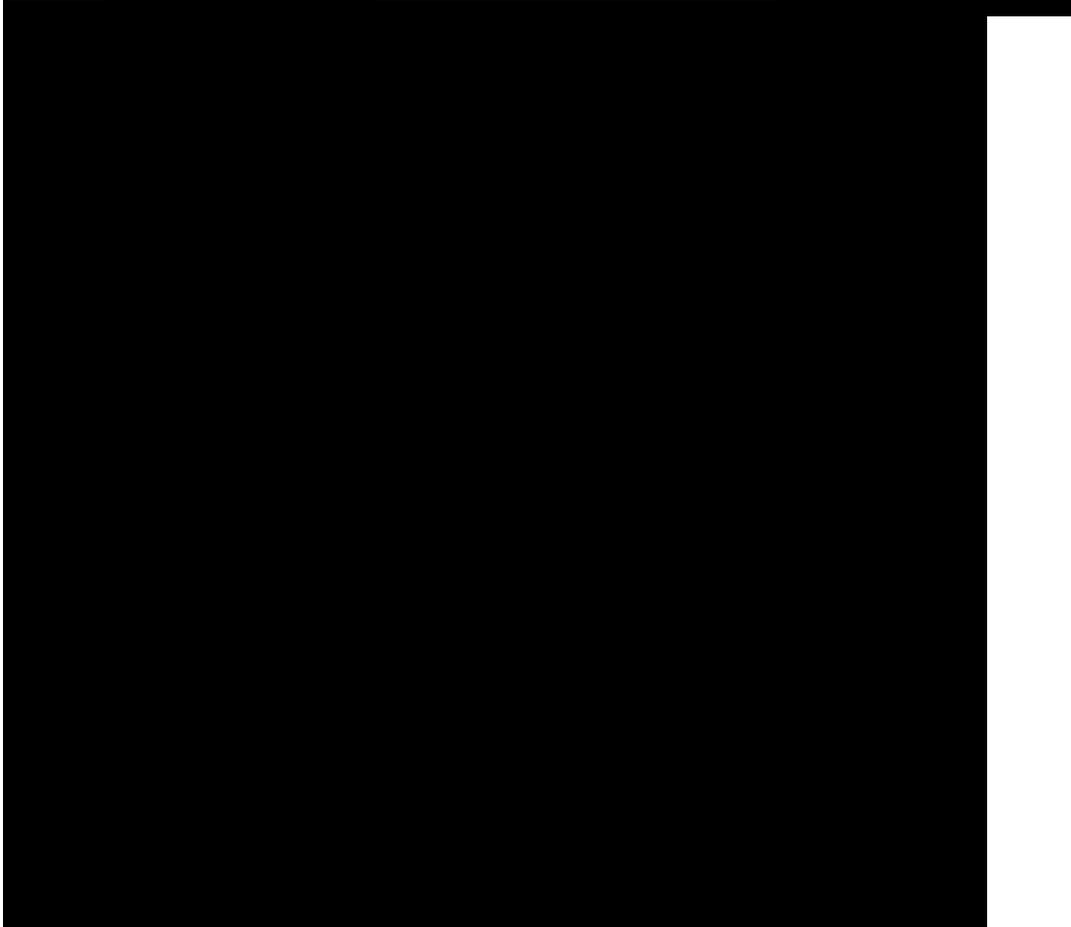




7. Under the [redacted] section enter up to [redacted] for the model. The fields for [redacted] are automatically displayed. [redacted]



8. Click the [redacted] button. The model contains a budget [redacted]



12. Go to the Budget worksheet to confirm the amounts have been applied from your model.

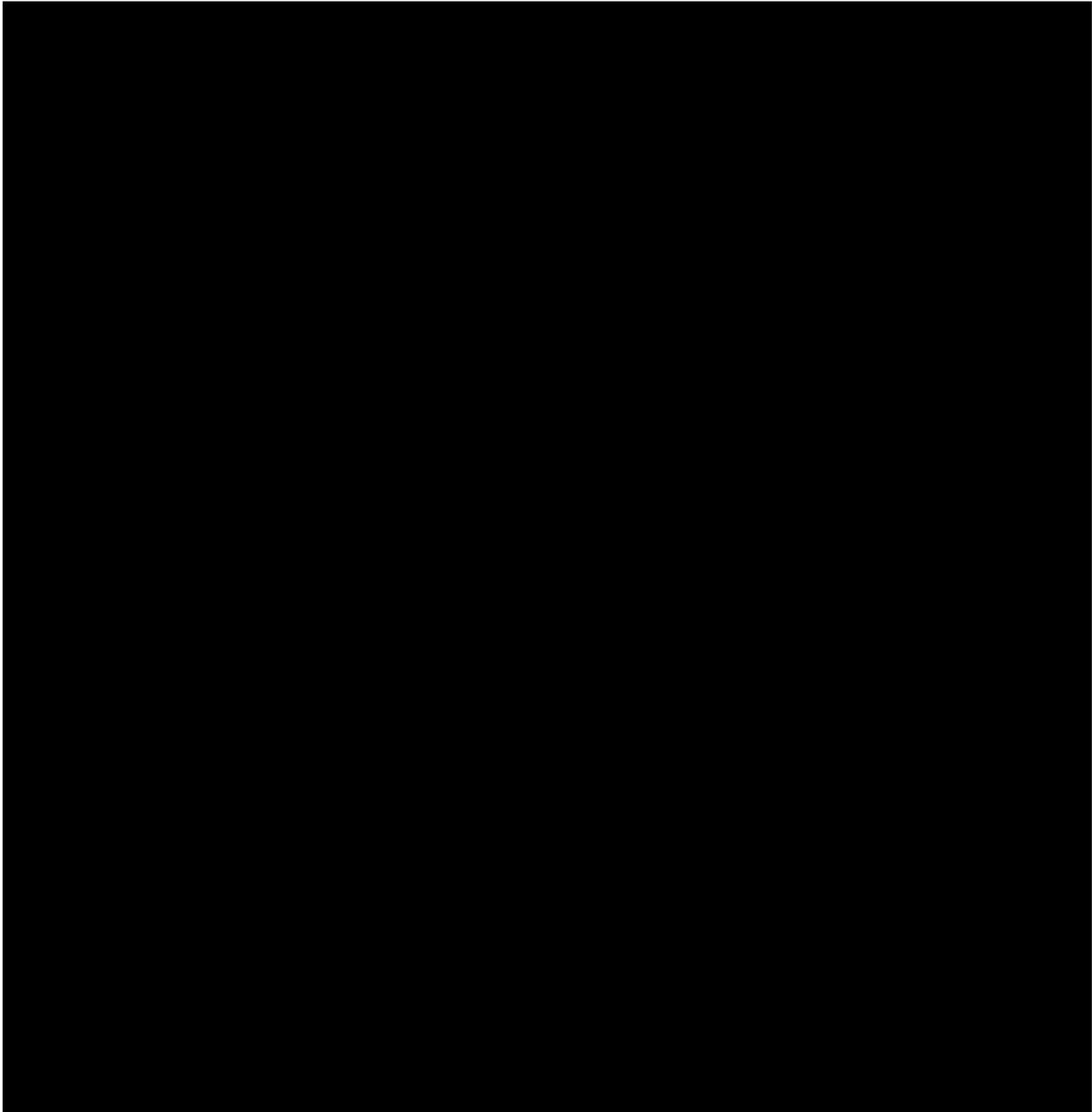
Uploading Budget Distributions from Excel



Important! Oracle [REDACTED] must be installed before this method can be used.

Note: For clarity, this section refers to the Excel worksheet as a “spreadsheet” to differentiate it from the worksheets in the Fusion application.

The Manager Budgets worksheet can be downloaded to an Excel spreadsheet to enter budget amounts and budget access levels and then uploaded back to the worksheet. [REDACTED]



Publishing or 'Passing Down' Budgets



[Redacted]

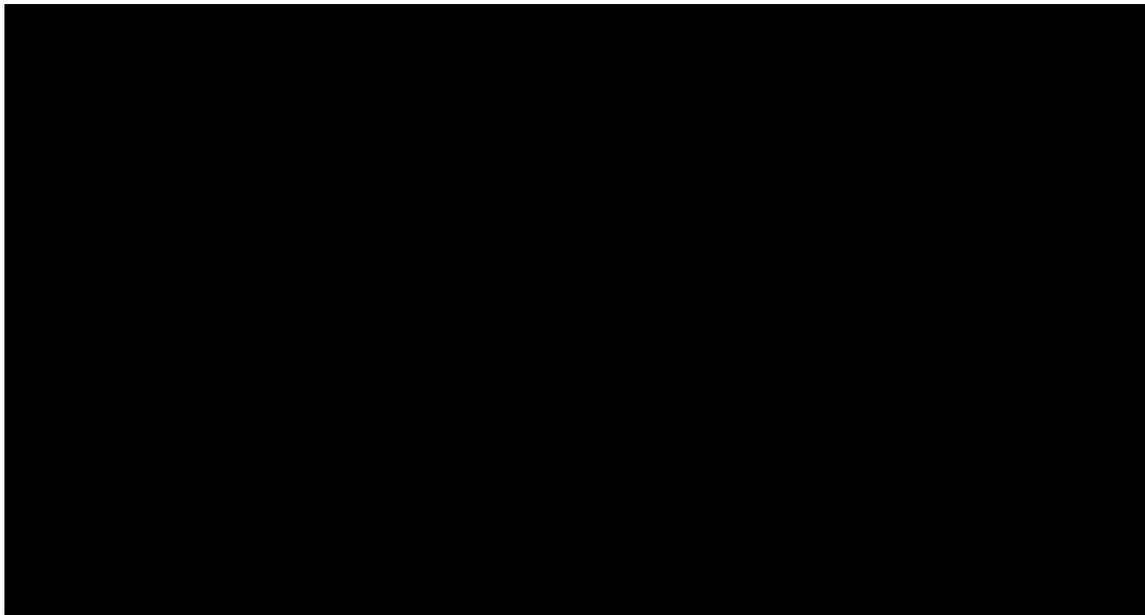
1. Navigate to the budget worksheet.
2. In the [Redacted] section, [Redacted]
[Redacted]
3. Use the drop down menu on the [Redacted]
[Redacted]
4. Click **Save** or **Save and Close** to save your changes.

Withdrawing Published Budgets

1. Navigate to the budget worksheet.
2. In the [Redacted] section, [Redacted]
[Redacted]
3. Use the drop down menu on the [Redacted]
[Redacted]
4. Click **Save** or **Save and Close** to save your changes.

Setting Subordinate Managers' Comp Worksheet Access Levels

Managers can set subordinate managers' Compensate Workforce worksheet (Comp Worksheet) access levels and Due Dates in the [Redacted] of their own Comp Worksheet. Refer to the "Guide to setting worksheet access levels for subordinate managers" in the ['Access Levels'](#) section.



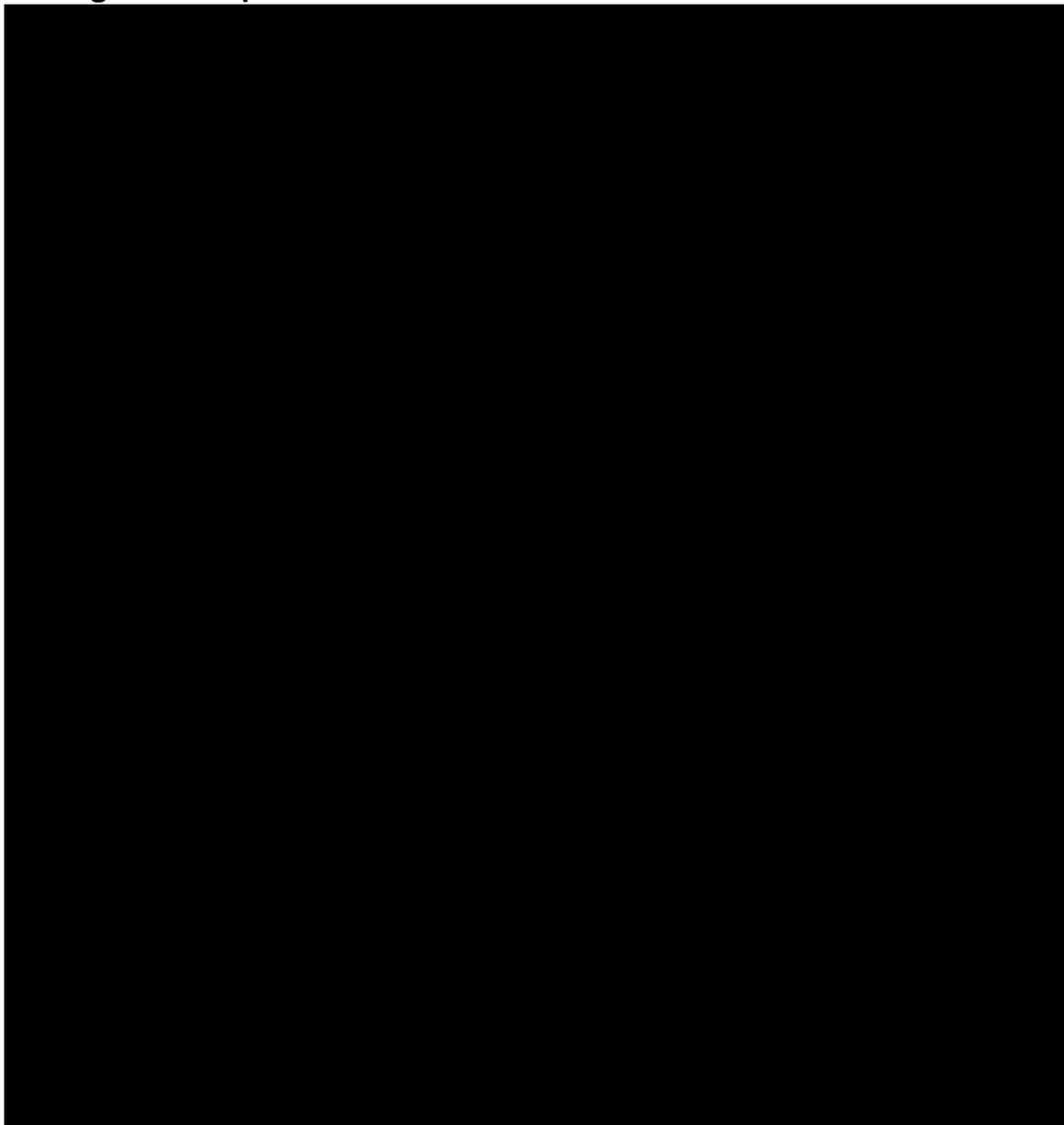
- [Redacted] – Subordinate managers cannot view or make allocations to workers.
- [Redacted] – Subordinate managers can allocate bonus awards to their workers.
- [Redacted] – Subordinate managers can view bonus awards to their workers.

Compensating Workers

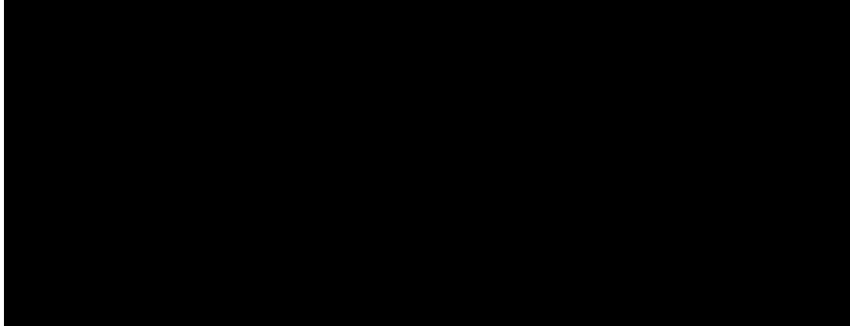
Go to the [REDACTED] section first if you will be passing down budgets to subordinate managers.

The Compensate Workforce worksheet (Comp worksheet) allows managers to allocate bonus awards to individual workers. Managers with subordinate managers and the appropriate access level use the Comp worksheet to approve their subordinate managers Comp worksheet submissions, and to set access levels and due dates for them. Managers must have [REDACTED] to access and use the Comp worksheet.

Accessing the Compensate Workforce Worksheet



7. To access the Compensate Workers worksheet, click either the [REDACTED]

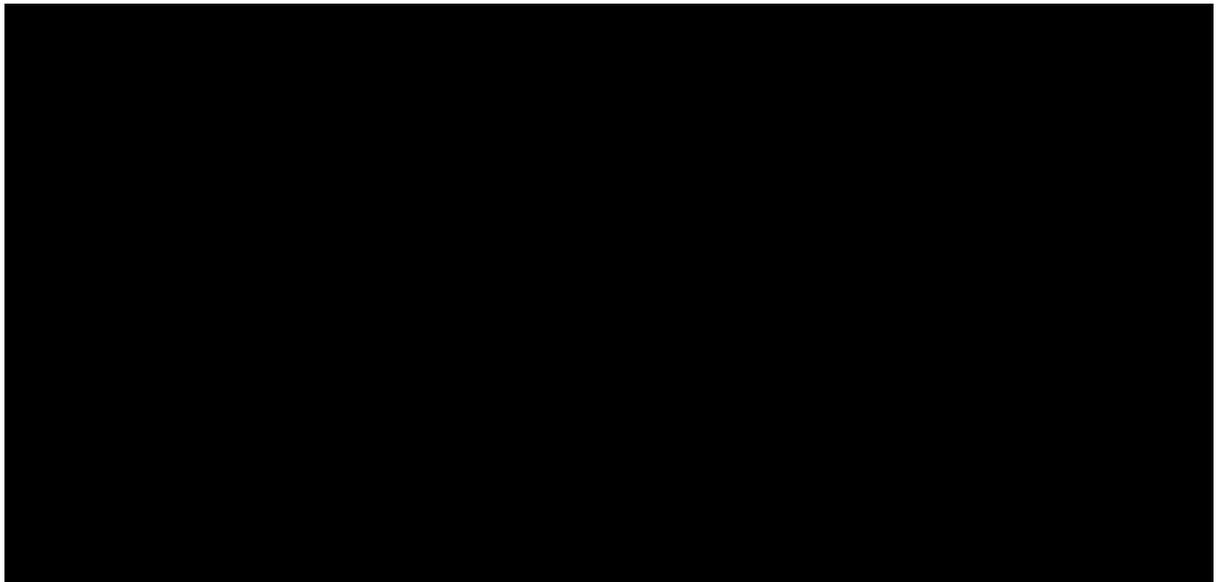


Comp Worksheet Overview

The Compensate Workforce worksheet (Comp worksheet) is used to allocate bonus awards to workers. The worksheet is comprised of [REDACTED]

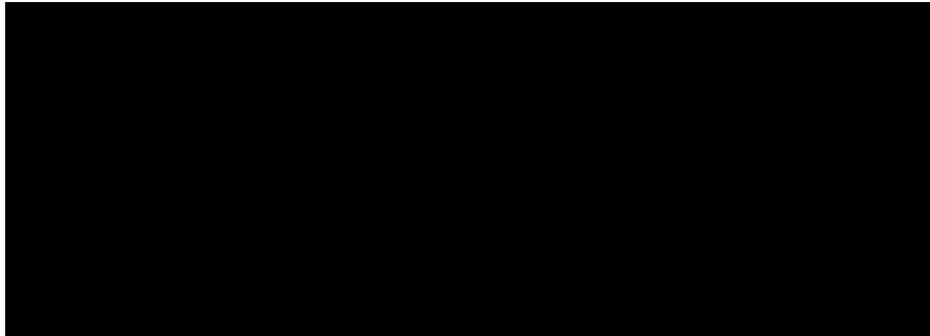


The [REDACTED] is where allocations to individual workers are made and submitted for approval. Bonus eligibility requirements and instructions for installing the Oracle [REDACTED] can be found at the top of the [REDACTED] followed by [REDACTED] sections. **Users must install the Oracle [REDACTED] before using the Excel export/upload function for uploading bonus awards to the FWC application.**





If budgets are passed down, the due dates for bonus awards and approvals of subordinate manager worksheet submissions are managed on the [REDACTED]. Links to various reports and statistics are also provided for your convenience. Managers with ICs and subordinate managers with no direct reports will not have an [REDACTED] in the Comp worksheet. Instructions for entering Due Dates are included under the Manager Budgets section.



Summary

The Summary section shows the overall and available budget amounts. No Overall Budget amounts will show if your manager has not [REDACTED] a budget for you. **Note:** [REDACTED]. The display can be changed in the Worksheet section.



The [REDACTED] shows the amount you distributed to yourself in your budget worksheet for awarding your 'Direct Reports'. [REDACTED]

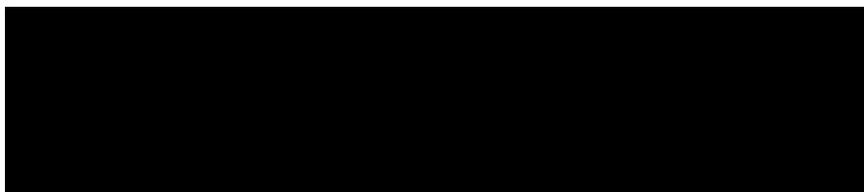


Worksheet

The worksheet contains its own toolbar and is where [REDACTED]. The worksheet view can be modified by clicking **View→Columns→Manage Columns** in the toolbar. Columns can also be arranged by dragging and dropping the column headers. **Note:** The first column cannot be moved.



The [REDACTED] setting in the worksheet toolbar defaults to [REDACTED] and affects the worksheet view as well as the budgets that display in the Summary section. **To display the Overall Budget Amount for your entire line of business, change the worksheet [REDACTED] and then click the [REDACTED]** The Summary section will display the overall budget and available budget amounts if your manager has published a budget for you. The Worksheet section will display the corresponding workers.

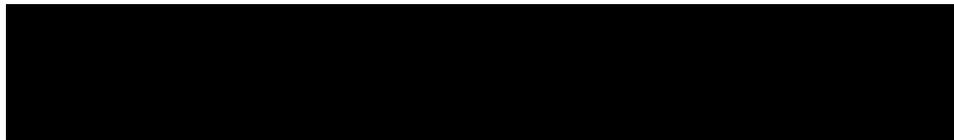


Awarding Bonuses

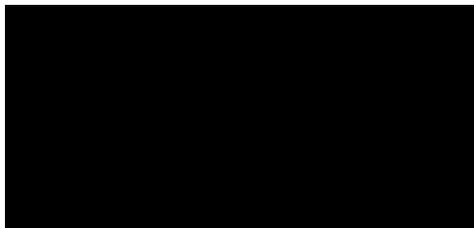
Bonus awards can be allocated by manually entering amounts in the Worksheet section of the Bonus tab, by creating and applying an allocation model or by uploading the allocations from an exported Excel spreadsheet.

Manually Rank, Rate and Award Bonuses

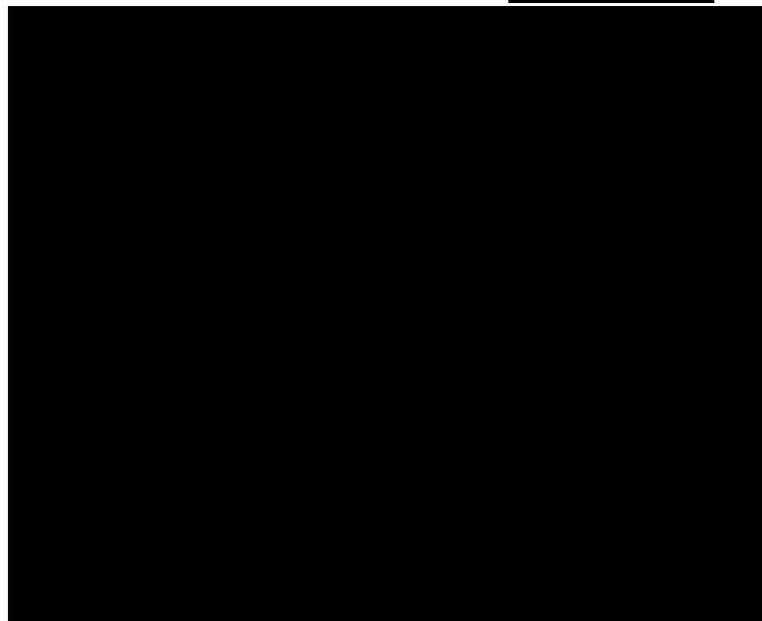
1. Review the list to ensure all eligible workers are listed. If your organization is large you will need to scroll to the bottom of the list in order to access the left-right scroll bar. You can click the **Detach** icon ( Detach) to view the worksheet in detached or full screen mode. Clicking the **Detach** icon again returns the screen to the normal worksheet mode.
2. To make entries for a worker click the worker's row. The columns that can be updated in the worksheet will appear as open fields. **Note:** In the example below, the worksheet columns were rearranged. You will need to use the left-right scroll bar to see the columns.



3. Enter a **Bonus Amount** or a **Percent of Eligible Salary** in the appropriate field. If an amount is entered, the percent column will auto-populate. If a percent is entered, the amount column will auto-populate.
4. If you choose to rank employees, enter them in the  column using whole numbers. Ranking is optional for the Global Bonus Process.
5. If you choose to rate employees, use the drop down in the  column to select the appropriate rating. Rating is optional for the Global Bonus Process.



6. Add notes for workers by clicking the icon in the 



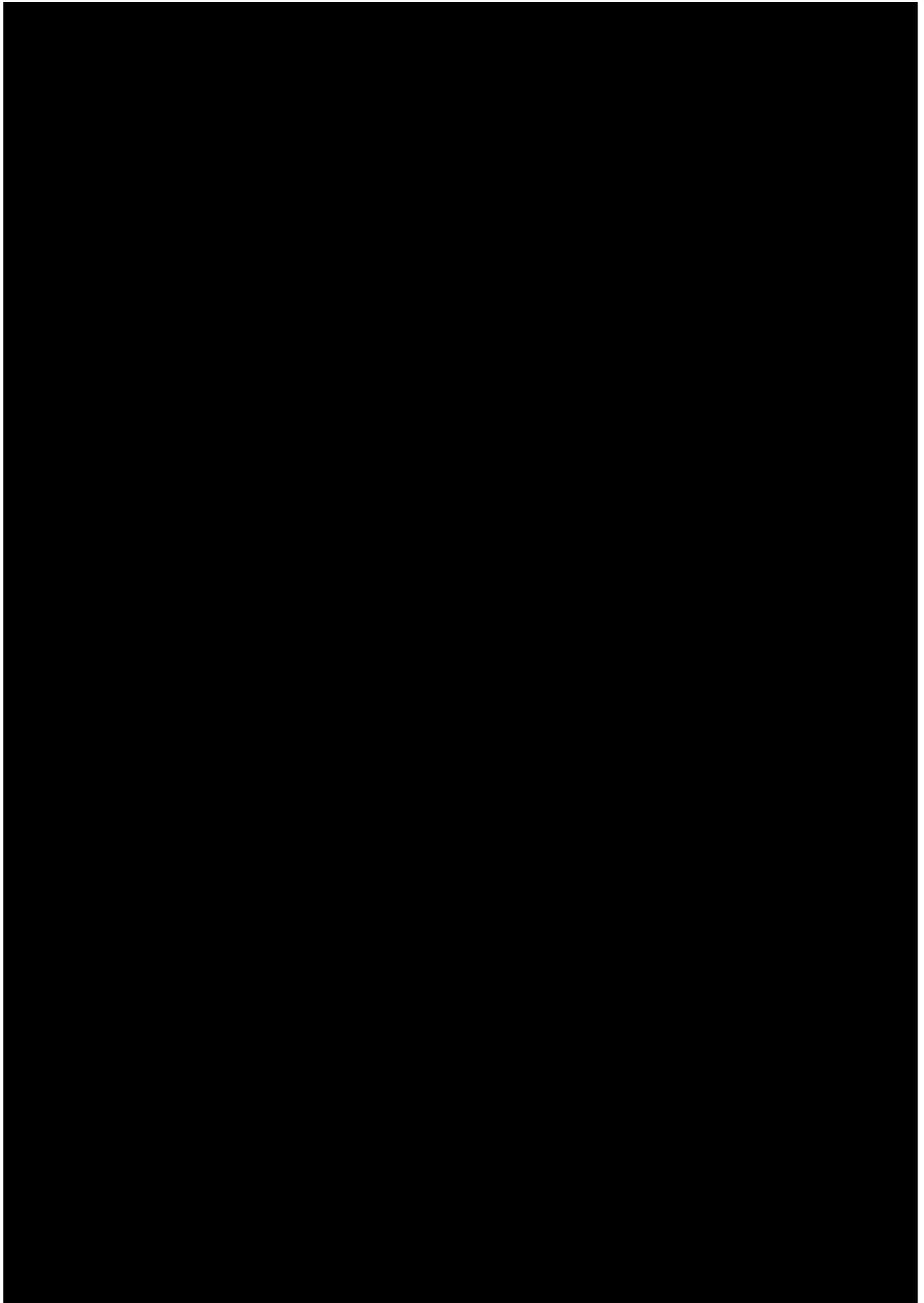
7. Add attachments for workers by clicking the icon in the [Redacted] [None ↕].

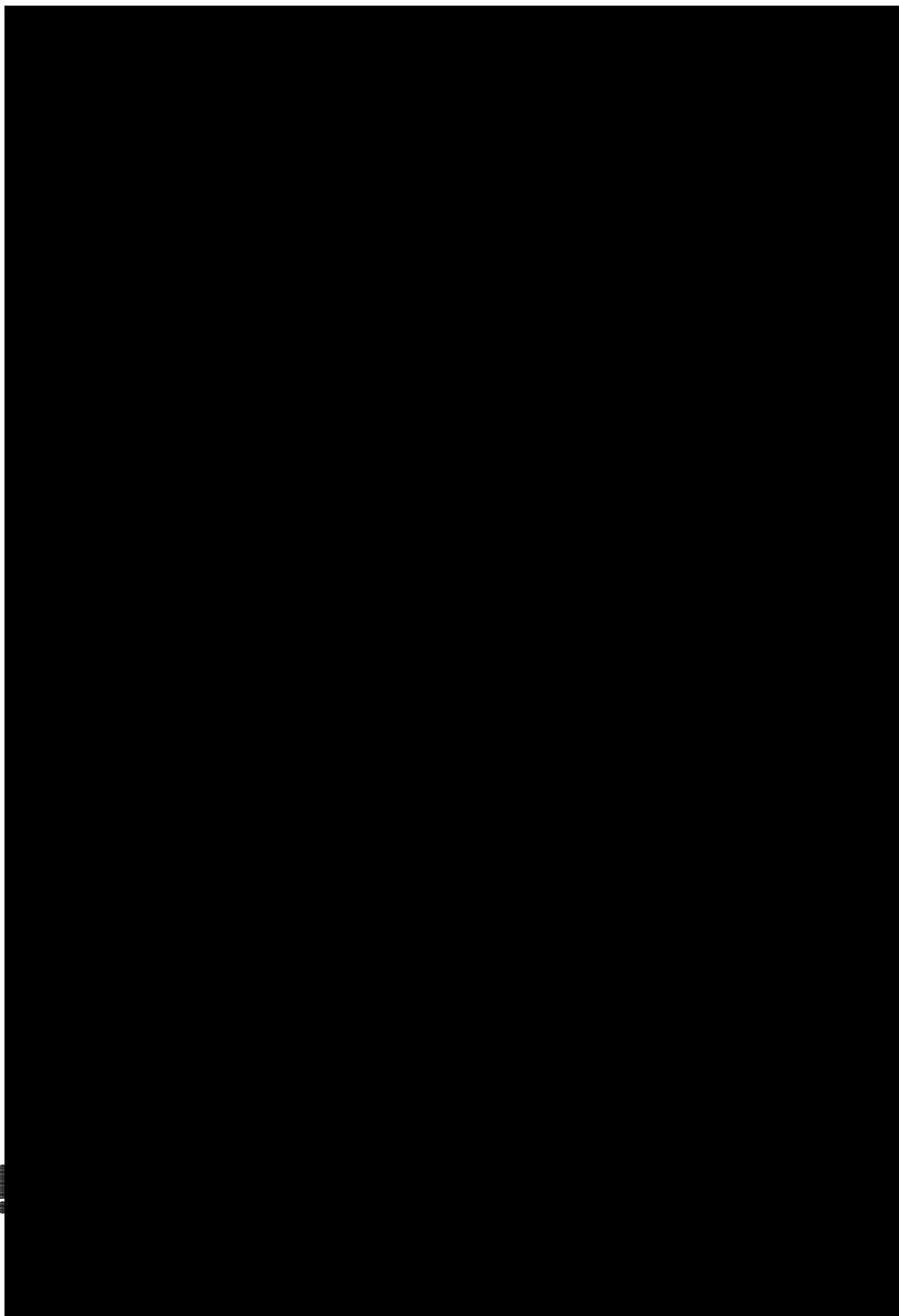


Creating and Applying a Bonus Allocation Model

Models make it easy to see how different allocation methods and criteria affect your budget, worker allocation, and target amounts. Many different models can be created, previewed and applied to the bonus award allocation amounts **or** to the budgets if you have budget access rights. Models should





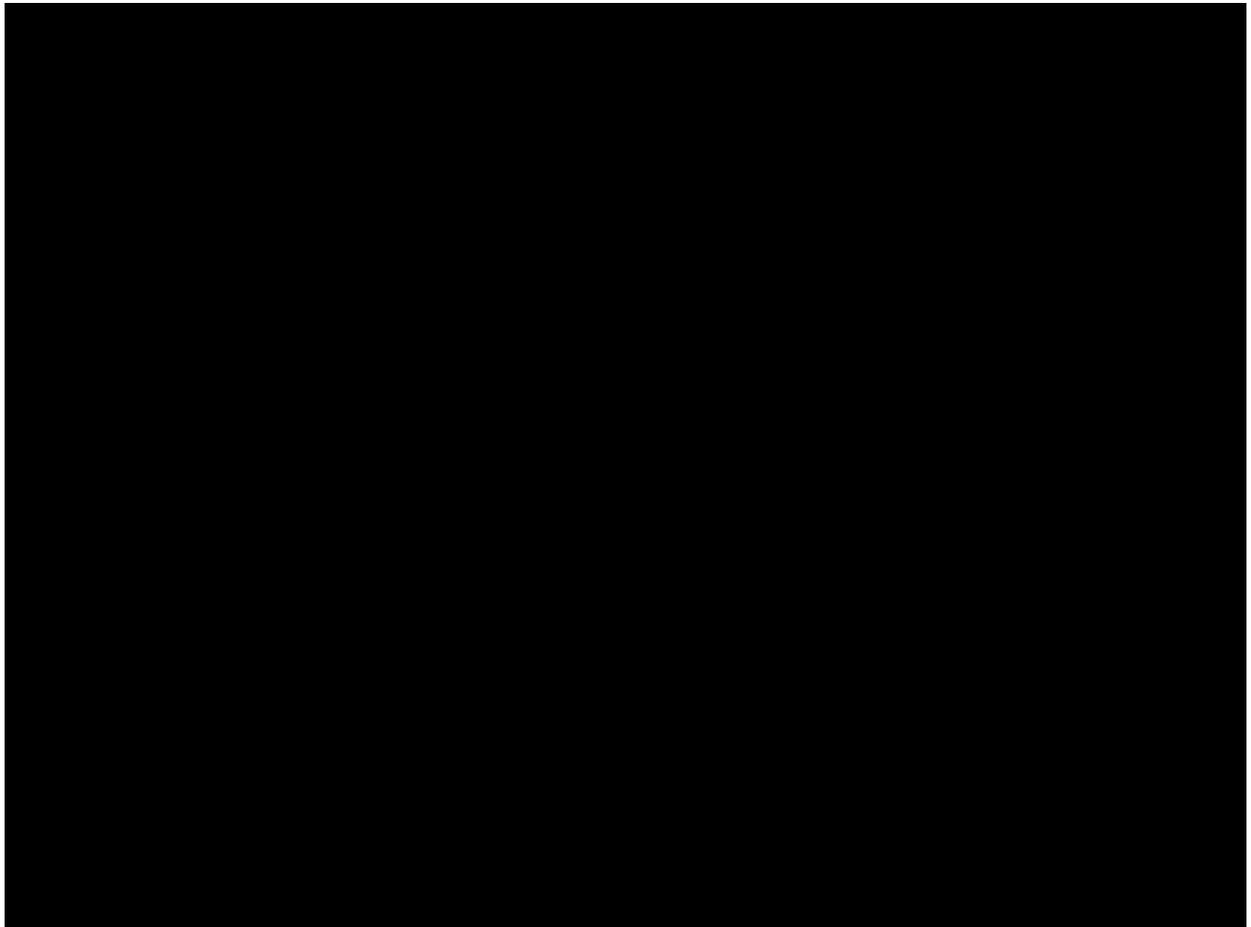


Uploading Bonus Award Allocations from Excel



Important! [REDACTED] must be installed before this method can be used.

Note: For clarity, this section refers to the Excel worksheet as a “spreadsheet” to differentiate it from the worksheets in the Fusion application.



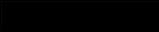
6. [REDACTED]

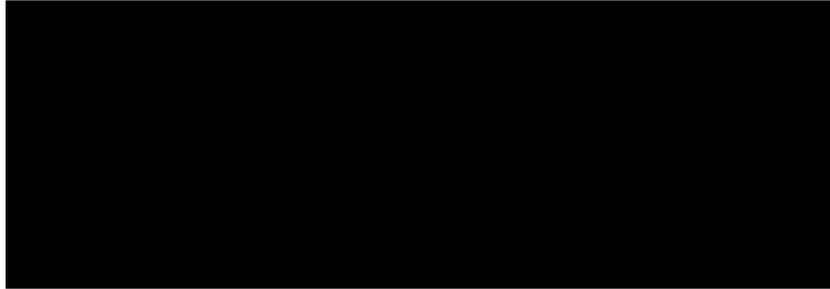
10. To add filters to the spreadsheet highlight only the column headers to be filtered. Do NOT highlight the entire row of headers as this will not work. Due to the protected status of the spreadsheet, filters do not work the same as in regular Excel spreadsheets.

11. [REDACTED]

12. Return to the Compensate Workforce worksheet to confirm the changes have uploaded successfully. Refresh the worksheet data by running a filter (e.g. change the Team filter to “All” or a specific direct report).

Approving Submissions

1. Navigate to the Comp Worksheet.
2. Click the .
3. Select the 
. Select multiple rows by holding down the CTRL key and clicking on each row. If necessary, expand the hierarchies by clicking on the arrow next to the subordinate manager's name ().

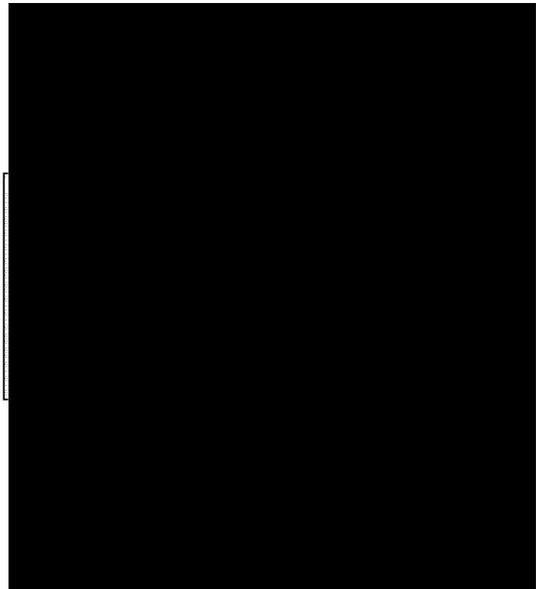


4. Use the appropriate action icons on the toolbar for the selected rows.

- a. To approve worksheets click the 
 and choose the appropriate action.

- b. To return the worksheet for correction click 
A pop up window will appear where a comment can be made to the subordinate manager. **Note:** All higher level managers will be able to see the comment.

- c. To request additional information click 
A pop up window will appear where a comment can be made to the subordinate manager.



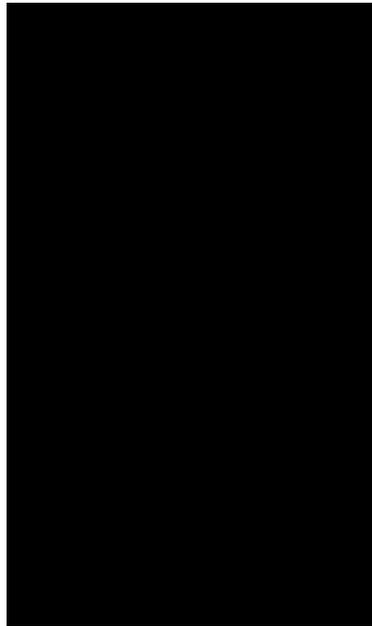
5. Click **Save** ( Save).

Reports and Statistics

A few reports and statistics are accessible from the [REDACTED] tab of the Compensate Workers worksheet. Links to the reports are [REDACTED]



Additional reports and statistics for the plan you are viewing are accessible from the [REDACTED] area.



- End -