

Compensation Workbench

Contents

Logging into Compensation Workbench	3
Compensation Allocations Page	4
Viewing Employee Details	5
Viewing Compensation History	6
Entering ASI Allocations	7
Entering a Merit Allocation	8
Entering a Market Adjustment and Bonus In-Lieu	8
Entering a Performance Bonus	9
ASI Ranges and Corresponding Icons	9
Use Allocation Wizard	10
Changing an Employee's Eligibility	13
Excluding an Employee from an ASI Component	13
Making an Employee Eligible for an ASI Component	15
Viewing Ineligible Employees	17
Using the Download to Spreadsheet Feature (PC Only)	19
Downloading the Spreadsheet	19
Entering Allocations via the Spreadsheet	24
Performing an Immediate Upload of the Spreadsheet (not saving)	24
Saving the Spreadsheet	26
Uploading a Saved Spreadsheet	27
Using the Flexible Summary Report	30
Audit History Report	32
Notes and Attachments	34
Adding a Note	34
Deleting a Note	35
Adding an Attachment	35
Updating an Attachment	38
Deleting an Attachment	40
Review and Submit ASI for Final Approval	41
Submitting an ASI for Approval	41
Recalling a Submitted ASI	43
Printing Employee Statements	44
Compensation Detail Report	47
Combined Plan View	48
Running the Report	48
Changing the Parameters of the Report	49
Excel Settings Required for Download to Spreadsheet	50
Internet Explorer Settings Required for Download to Spreadsheet	52

Logging into Compensation Workbench

- 1) Navigate to access.caltech site at the following url: <https://access.caltech.edu>.

access caltech
access.caltech provides a common place to access your online applications.

Please Log In

Username
comp1

Password

[forgot your password?]

First time logging in? [Click here](#). If you need assistance, please contact the IMSS Help Desk at 626.395.3500 (M-F, from 8AM to 5PM) or email us at help@caltech.edu.

IMPORTANT: Your browser must accept cookies to use access.caltech

Sign In

© California Institute of Technology. All Rights Reserved. Terms of Use. 1200 East California Boulevard Pasadena California 91125 (626) 395-6811 IMSS

- 2) Enter your access.caltech username and password and click on the **Sign In** button.

Your Online Applications

- Single Sign-on (SSO)
- ✗ CITI Federal Compliance Testing
- ✓ Compensation Workbench
- ✗ Fixed Assets Image Viewer
- ✓ Oracle Applications SSO R12 PRIME
- ▲ Parking
- ✗ TQFR Reports

- 3) Click on the **Compensation Workbench** link.
The *Compensation Workbench Home* page will open

ORACLE Compensation Workbench

Diagnostics Preferences Help Close Window

Compensation Workbench Home

Checklist: Workbench, Comp1

Expand All | Collapse All

Task	Access	Last Updated	Status	Go To Task
Annual Salary Increase (ASI) (Oct-10 - Sep-11)				
Award ASI	Full Access			Go To Task
Review and Submit ASI for Final Approval	Full Access			Go To Task
Print Employee Statement	Full Access			Go To Task

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications.

From	Subject	Sent	Due
There are no notifications in this view.			

TIP Vacation Rules - Redirect or auto-respond to notifications.
TIP Working Access - Specify which users can view and act upon your notifications.

Reporting

- Compensation Detail
- Combined Plan View

Information and Links

- Training Materials
- HR Information
- Sample Link 1
- Sample Link 2
- Sample Link 3
- Sample Link 4
- Sample Link 5

About this Page Privacy Statement

Diagnostics Preferences Help Close Window

Copyright (c) 2005, Oracle. All rights reserved.

Compensation Allocations Page

Within the Compensation Allocations page you have the ability to view employee details such as Job and Salary History as well as other employment details.





1) Click on the **Go to Task**  icon on the Award ASI row.

The *Compensation Allocations* window will open.


Organization Number	Employee Number	Employee Category	Employment Category	Grade/Classification	Current Base Pay	Current Hly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp. Test 1	Fulltime-Regular	U.39 Staff Support.U...1060.GENAD...	51,916.80	24.96	0.00	0.00	51,916.80	24.96	Workbench, 40 Comp1	0.00	0	0.00	0
Staff Benefits	1150773	Comp. Test 17	Fulltime-Regular	U.42 Administrator-IC.U.1067.GENAD...	68,400.00	32.88	0.00	0.00	68,400.00	32.88	Workbench, 40 Comp1	0.00	0	0.00	0
Staff Benefits	1152203	Comp. Test 18	Fulltime-Regular	U.42 Administrator-IC.U.1067.GENAD...	57,900.00	27.84	0.00	0.00	57,900.00	27.84	Workbench, 40 Comp1	0.00	0	0.00	0
Staff Benefits	1135303	Comp. Test 2	Fulltime-Regular	U.39 Staff Support.U...1060.GENAD...	39,624.00	19.05	0.00	0.00	39,624.00	19.05	Workbench, 40 Comp1	0.00	0	0.00	0

Viewing Employee Details

The screenshot shows the Oracle Compensation Workbench interface. At the top, there are navigation links: Diagnostics, Home, Logout, Preferences, Help. Below that, it says "Logged In As Workbench, Comp1". There are buttons for Cancel, Recalculate, Save, and Finish. An "Options" menu is open, listing: Use Allocation Wizard, Download To Spreadsheet, Change Employee Eligibility, Flexible Summary, and Audit History.

New Salary Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in Lieu (BIL)	BIL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Salary	Employee Details	Message	Compensation History	Notes	Target %	Minimum Target %	Maximum Target %
4.96	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
2.88	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
7.84	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
9.05	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6

At the bottom, there are buttons for Cancel, Recalculate, Save, and Finish, and a copyright notice: Copyright (c) 2006, Oracle. All rights reserved.

- 2) Scroll to the right and click on the **Employee Details**  icon. The *Employee Details* window will open.

The screenshot shows the Oracle Compensation Workbench interface for "Plan Annual Salary Increase (ASI) Access Full Access". It is logged in as "Workbench, Comp1". The page title is "Employee Details: Comp, Test 1". There is a "Return" button at the top right.

General Information

Name	Test 1 Comp	Hire Date	05-Mar-1990
Employee Number	1135277	Years Employed	21.4

Employment Information

Business Group	Caltech	Supervisor Name	Comp1 Workbench
Organization	Staff Benefits	Category	Fulltime-Regular
Location	Human Resources	Hours	40 Hours/Week
Job Group	Staff Support.U..1060.GENAD...	Employment Status	Active Assignment
Group	Staff.Yes.No...R2..Assistant		

Compensation Information

Current Pay Rate	24.96 USD Hourly Salary	Payroll	Bi-Weekly
Annualized Pay Rate	24.96 USD	Grade	U.39

At the bottom right, there is a "Return" button circled in red. At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: Copyright (c) 2006, Oracle. All rights reserved.

This window displays details such as Hire Date, Supervisor Name, Hours, etc.

- 3) Click on the **Return**  button to close the window.

Viewing Compensation History

Diagnosics Home Logout Preferences Help
Logged In As Workbench, Comp1

Cancel Recalculate Save Finish

Options

- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

New Hire	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in lieu (BIL)	BIL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Salary	Employee Details	Gross or Net	Message	Compensation History	Target %	Minimum Target %	Maximum Target %
4.96	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
2.88	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
7.84	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
9.05	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0		Net Pay			4	2	6

Cancel Recalculate Save Finish

Copyright (c) 2006, Oracle. All rights reserved.

- 4) Scroll to the right and click on the **Compensation History** icon.
The *Compensation History* window will open

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access
Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1
History: Comp, Test 1

Return

Base Pay Overtime Pay Bonus Other Compensation Job

Date	Starting Salary	Change Amount	Change %	New Salary Frequency	Currency
27-Sep-2010	24.00	0.96	4.00	24.96 Hourly	USD
15-Sep-2008	22.85	1.15	5.03	24.00 Hourly	USD
17-Sep-2007	21.85	1.00	4.58	22.85 Hourly	USD
18-Sep-2006	21.00	0.85	4.05	21.85 Hourly	USD
19-Sep-2005	20.45	0.55	2.69	21.00 Hourly	USD
20-Sep-2004	19.65	0.80	4.07	20.45 Hourly	USD
22-Sep-2003	19.10	0.55	2.88	19.65 Hourly	USD
23-Sep-2002	18.18	0.92	5.06	19.10 Hourly	USD
24-Sep-2001	17.31	0.87	5.03	18.18 Hourly	USD
06-Nov-2000	14.51	2.80	19.30	17.31 Hourly	USD
25-Sep-2000	13.82	0.69	4.99	14.51 Hourly	USD
13-Sep-1999	13.15	0.67	5.10	13.82 Hourly	USD
14-Sep-1998	13.15	0.00	0.00	13.15 Hourly	USD

Return

Return

Preferences Diagnostics Preferences Help Close Window

About this Page Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

This window displays information such as Base Pay, Overtime Pay, Bonus, Other Compensation and Job Details.

- 5) Click on the **Return** button to close the window.

Entering ASI Allocations

Allocations are entered within the Employee Allocation (bottom half) section of the Compensation Allocations page. Each component (Merit, Market Adjustment, Bonus In-Lieu and Performance Bonus) has two columns so that you may enter the allocation as a dollar amount OR a percentage amount.

As you enter your allocations and click on the Recalculate or Save buttons, the information in the Total and individual Component columns displayed in the Compensation Summary – Team (upper half) section of the window will change to reflect your entries. The following fields will be updated as you save (or use recalculate) your entries: Employees Receiving, % Receiving, Total Allocated \$, Unused ASI Pool \$ and Average Allocated %.

Within the Employee Allocations section the Total ASI % Total ASI%, New Base Pay and New Hourly rate will also change based upon your entries.

The screenshot displays the Oracle Compensation Workbench interface. The top section, 'Compensation Summary – Team', shows a table with columns for Total, Merit, Market Adjustment, Bonus In-Lieu, and Performance Bonus. The bottom section, 'Employee Allocations', shows a table with columns for Employee, Organization, Employment Category, Grade, Classification, Current Base Pay, Current Hourly Rate, Total ASI \$, Total ASI %, New Base Pay, New Hourly Rate, Supervisor, Normal Hours, Merit, Merit as % of Eligible Salary, Market Adjustment, and Market Adj as % of Eligible Salary. A red circle highlights the 'Merit' column in the Employee Allocations table, showing a value of 3,500.00 for the first employee. Another red circle highlights the 'Total' column in the Compensation Summary table, showing a value of 3,500.00 USD for the Merit component.

Compensation Summary – Team		Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees		4	4	4	4	4
Employees Receiving		1	1	0	0	0
% Receiving	25 %	25 %	25 %	0 %	0 %	0 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD					
ASI Pool %	4 %					
Total Allocated \$	3,500.00 USD	3,500.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
Unused ASI Pool \$	5,213.63 USD					
Average Allocated %	1.61 %	1.61 %	0 %	0 %	0 %	0 %

Employee	Organization	Employment Category	Grade	Classification	Current Base Pay	Current Hourly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits 1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U.1060.GENAD...	51,916.80	24.96	3,500.00	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0
Staff Benefits 1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U.1067.GENAD...	68,400.00	32.88	0.00	0	68,400.00	32.88	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits 1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U.1067.GENAD...	57,900.00	27.84	0.00	0	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits 1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U.1060.GENAD...	39,624.00	19.05	0.00	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

When we enter 3500 in the Merit column for the employee on line one and click on the Save or Recalculate button, the information in the Total and Merit columns within Summary section has now changed to reflect this entry.

- Employees Receiving is **1**
- % Receiving is **25%**
- Total Allocated \$ is **3,500.00**
- Unused ASI Pool \$ is **5,213.63**
- Average Allocated % is **1.61**

Entering a Merit Allocation

For this example, we will give the employee on line number one 3500 as a Merit allocation.

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	3,500.00	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0.00
Staff Benefits	1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	0.00	0.68	400.00	32.88	Workbench, Comp1	40	0.00	0	0.00	0.00
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	1,000.00	1.73	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0.00
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00	0.39	624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0.00

- 1) Place your cursor in the Merit field for the employee on line one and enter **3500** in the *Merit* column.
- 2) Select the **Save** button to save your work.

Caution: The **Recalculate** button updates the amounts in the Employee Allocations and Compensation Summary sections but it does not save your work. If you exit without saving, your data will be lost.

Entering a Market Adjustment and Bonus In-Lieu

You may enter more than one allocation per employee. For this example, we will enter a Market Adjustment and Bonus In-Lieu for the employee on line two.

Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in Lieu (BIL)	BIL as % of Eligible Salary
Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	3,500.00	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0	0.00	0
Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	3,368.00	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.91	2,368.00	2
Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	1,000.00	1.73	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0
Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00	0.39	624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0

- 3) Enter **2000** in the *Market Adjustment* column and **2** in the *BIL as % of Eligible Salary* column.
- 4) Select the **Save** button to save your work.

Entering a Performance Bonus

For this example, we will enter a Performance Bonus for the employee on line three.

	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in Lieu (BIL)	BIL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Salary	Employee Details	Gross or Net
50.GENAD...	51,916.80	24.96	3,500.00 ↑	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0	0.00	0	0.00	0		
VAD...	68,400.00	32.88	3,368.00 ↑	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.92	1,368.00	2	0.00	0		
VAD...	57,900.00	27.84	2,000.00 ↓	3.45	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0	0.00	5	2,000.00	3	6	Net
50.GENAD...	39,624.00	19.05	0.00 ↓	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0		

- 5) Enter **2000** in the Performance Bonus column for the employee on line three.
- 6) Select **Net** from the Gross or Net Drop down menu.
- 7) Select the **Save** button to save your work.
- 8) Once you have completed entering all of your allocations, click on the **Finish** button.

ASI Ranges and Corresponding Icons

Once the ASI Pool percent has been determined for the year, it is entered into the Compensation Workbench application and that percent is referred to as the Target % and there is also a Minimum Target % as well as Maximum Target %.

As you enter your allocations, the icon within the Total ASI \$ column will change to reflect how that amount falls into the range.

- A **Red Up** ↑ arrow indicates that the Total ASI for this employee is above, and outside of, the target range
- A **Red Down** ↓ arrow indicates that the Total ASI for this employee is below, and outside of, the target range
- A **Green Up** ↑ arrow indicates that the Total ASI for this employee is above, but within, the target range
- A **Green Down** ↓ arrow indicates that the Total ASI for this employee is below, but within, the target range
- A **Bulls eye** 🎯 indicates that the Total ASI for this employee is on target.

Use Allocation Wizard

Rather than enter the allocations for each employee one and a time, you may use this wizard to update some or all of your employees allocations at the same time. For this example, we will use the wizard to give three of the four employees a Bonus In-Lieu.

The screenshot shows the Oracle Compensation Workbench interface. The top navigation bar includes "ORACLE Compensation Workbench", "Plan Annual Salary Increase (ASI)", "Access: Full Access", and "Diagnostics Home Logout Preferences Help". The user is logged in as "Workbench, Comp1". The main content area is titled "Workbench, Comp1 : Compensation Allocations". On the right, an "Options" menu is open, with the "Use Allocation Wizard" option highlighted and circled in red with the number "1". Other options in the menu include "Download To Spreadsheet", "Change Employee Eligibility", "Flexible Summary", and "Audit History". Below the options menu, there are buttons for "Cancel", "Recalculate", "Save", and "Finish".

Compensation Summary - Team					
	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	4	4	4	4
Employees Receiving	0	0	0	0	0
% Receiving	0 %	0 %	0 %	0 %	0 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
Unused ASI Pool \$	8,713.63 USD				
Average Allocated %	0 %	0 %	0 %	0 %	0 %

Organization Number	Employee Number	Employee Category	Employment Category	Grade/Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Reguler	U.39 Staff Support.U...1060.GENAD...	51,916.00	24.96	0.00	0.00	51,916.00	24.96	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1150773	Comp, Test 17	Fulltime-Reguler	U.42 Administrator-JC.U...1067.GENAD...	68,400.00	32.88	0.00	0.00	68,400.00	32.88	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1152203	Comp, Test 18	Fulltime-Reguler	U.42 Administrator-JC.U...1067.GENAD...	57,900.00	27.84	0.00	0.00	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1135303	Comp, Test 2	Fulltime-Reguler	U.39 Staff Support.U...1060.GENAD...	39,624.00	19.05	0.00	0.00	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

1) Click on the **Use Allocation Wizard**.

The screenshot shows the "Component Selection" step of the Allocation Wizard. The top navigation bar is the same as in the previous screenshot. The main content area has a progress bar with four steps: "Component Selection", "Employee Selection", "Distribution Method", and "Calculation Details", with "Review" as a final step. The "Component Selection" step is active. Below the progress bar, there is a "Next" button circled in red with the number "3". The main text says "Please select the Component for which you wish to Automatically Allocate." Below this is a "Select Component Name" section with four radio buttons: "Merit", "Market Adjustment", "Bonus In-Lieu", and "Performance Bonus". The "Bonus In-Lieu" radio button is selected and circled in red with the number "2". At the bottom right, there are "Cancel" and "Next" buttons.

2) Click on the **Bonus In-Lieu** radio button.

3) Click on the **Next** button.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

Person Selection

Select the employees below for whom you want to allocate compensation.

Select	Employee Name	Job	Eligible Salary	Supervisor Name
<input type="checkbox"/>	Test 17 Comp	Administrator-IC.U..1067.GENAD...	68,400.00	Comp1 Workbench
<input checked="" type="checkbox"/>	Test 18 Comp	Administrator-IC.U..1067.GENAD...	57,900.00	Comp1 Workbench
<input checked="" type="checkbox"/>	Test 2 Comp	Staff Support.U..1060.GENAD...	39,624.00	Comp1 Workbench

Cancel Back Next

About this Page Privacy Statement

Copyright (c) 2008, Oracle. All rights reserved.

- 4) Uncheck the box for employee on line number two.
- 5) Click on the **Next** button.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

Distribution Method

Select a calculation type that will be used to calculate the compensation award

Distribute Equally using Allocation Calculator ⓘ

Cancel Back Next

About this Page Privacy Statement

Copyright (c) 2008, Oracle. All rights reserved.

- 6) Click on the **Distribute Equally using Allocation Calculator** radio button.
- 7) Click on the **Next** button.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

Calculation Details - Distribute Equally using Allocation Calculator

Component **Bonus In-Lieu**

Overall Budget **0.00 USD**
Available Budget **(1,368.00) USD**

Supply values below and press recalculate to calculate the remaining values. Once you are satisfied with the values, continue to the next step to review the results of the distributions.
Currency = US Dollar

Allocation Calculator		Recalculate
Number of Employees	3	
Total Eligible Salaries	149,440.80	USD
Average Eligible Salary	49,813.60	USD
Average Amount Per Employee		USD
Average % of Eligible Salaries	3.00	%

Cancel Back Next

About this Page Privacy Statement

Copyright (c) 2008, Oracle. All rights reserved.

- 8) For this example we will enter **3** in the *Average % of Eligible Salaries* field.
- 9) Click on the **Next** button.
The *Review* window will open

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help
Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

Review

Component **Bonus In Lieu** Cancel Back Apply

Indicates Changed Items

Compensation Summary

Eligible Employees	4
Employees Receiving	4
% Receiving	100 %
Total Eligible Salaries	217,840.80 USD
Total Allocated	5,851.22 USD
Average % of Eligible Salaries	2.69 %

Employee Allocations

Employee Name	Job	Employee Number	Eligible Salary % of Eligible Salary	Amount Units
Test 1 Comp	Staff Support.U..1060.GENAD...	1135277	51,916.80 3	1,557.50 USD
Test 17 Comp	Administrator-IC.U..1067.GENAD...	1150773	68,400.00 2	1,368.00 USD
Test 18 Comp	Administrator-IC.U..1067.GENAD...	1152203	57,900.00 3	1,737.00 USD
Test 2 Comp	Staff Support.U..1060.GENAD...	1135303	39,624.00 3	1,188.72 USD

Cancel **10** Apply

About this Page Privacy Statement Diagnosics Home Logout Preferences Help Copyright (c) 2006, Oracle. All rights reserved.

10) Click on the **Apply** button.
The *Compensation Allocations* window will open

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help
Logged In As Workbench, Comp1

Compensation Workbench Home > Workbench, Comp1 : Compensation Allocations Cancel Recalculate Save Finish

Compensation Summary - Team

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	4	4	4	4
Employees Receiving	4	1	1	4	1
% Receiving	100 %	25 %	25 %	100 %	25 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	13,351.22 USD	3,500.00 USD	2,000.00 USD	5,851.22 USD	2,000.00 USD
Unused ASI Pool \$	(4,637.59) USD				
Average Allocated %	6.13 %	1.61 %	0.92 %	2.69 %	0.92 %

Employee Allocations

Find Name Go

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	5,057.50 ↑	9.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0
Staff Benefits	1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	3,368.00 ↓	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.92
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	3,737.00 ↓	6.45	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	1,188.72 ↓	3	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

Cancel **11** Save Finish

About this Page Privacy Statement Diagnosics Home Logout Preferences Help Copyright (c) 2006, Oracle. All rights reserved.

11) Click on the **Save** button.

Caution: You must click on the **Save** button to save the entries made using the Wizard. If you do not, your allocations will not be saved.

Changing an Employee's Eligibility

You have the ability to make an employee ineligible for single or multiple ASI components or exclude them entirely.

CAUTION: If you initially gave an employee an increase and are now excluding them you must first remove the amounts entered in the Employee Allocations section as the amounts within the Compensation Summary section are not automatically adjusted and their ASI amount will still be factored in as part of your Total Allocated \$

Excluding an Employee from an ASI Component

For this example, we make the employee on line three ineligible for a Merit increase.

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says 'ORACLE Compensation Workbench Plan Annual Salary Increase (ASI) Access Full Access'. Below that, there are navigation links: 'Diagnostics Home Logout Preferences Help'. The main content area is titled 'Workbench, Comp1 : Compensation Allocations'. There are buttons for 'Cancel', 'Recalculate', 'Save', and 'Finish'. Below this is a 'Compensation Summary - Team' table with columns: Total, Merit, Market Adjustment, Bonus In-Lieu, Performance Bonus. The table shows data for Eligible Employees, Employees Receiving, % Receiving, Total Eligible Salaries, ASI Pool \$, ASI Pool %, Total Allocated \$, Unused ASI Pool \$, and Average Allocated %.

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	4	4	4	4
Employees Receiving	4	1	1	4	1
% Receiving	100 %	25 %	25 %	100 %	25 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	13,351.22 USD	3,500.00 USD	2,000.00 USD	5,851.22 USD	2,000.00 USD
Unused ASI Pool \$	(4,637.59) USD				
Average Allocated %	6.13 %	1.61 %	0.92 %	2.69 %	0.92 %

Below the summary is the 'Employee Allocations' table with columns: Organization Number, Employee Number, Employee Name, Employment Category, Grade, Classification, Current Base Pay, Current Hly Rate, Total ASI \$, Total ASI %, New Base Hourly Pay, New Hourly Rate, Supervisor, Normal Hours, Merit, Merit as % of Eligible Salary, Market Adjustment, Market Adj as % of Eligible Salary.

An 'Options' menu is open on the right side of the screen, listing several actions: 'Use Allocation Wizard', 'Download To Spreadsheet', 'Change Employee Eligibility', 'Eligible Summary', and 'Audit History'. The 'Change Employee Eligibility' option is circled in red with the number '1' inside the circle.

1) Click on the **Change Employee Eligibility** link.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Employee Eligibility

The change of an employee's eligibility status will change the aggregate eligible salary amounts for the employee's rollup (up to the highest manager). This can result in a change of budget amounts for those managers that have already established budgets.

Find Name Go View All Countries Direct Employees Eligible and Ineligible Go

Status	Name	Country	Employee Number	Job	Worksheet Manager	Overall EE Eligibility	Merit	Market	BIL	Perf Bonus
Comp, Test 1	US	1135277	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 18	US	1152203	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Ineligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 2	US	1135303	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible

About this Page Privacy Statement

Diagnosics Home Logout Preferences Help

Copyright (c) 2008, Oracle. All rights reserved.

- 2) For the employee on line three we will select **Ineligible** from the *Merit* drop down menu.
- 3) Click on the button.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Preferences Diagnosics Home Logout Preferences Help

Logged In As Workbench, Comp1

Review

Use this page to review eligibility or request a change of eligibility. Please notice that changes to eligibility may alter existing budget amounts for all higher managers because their Total Eligible Salary amounts will be increased or reduced.

Indicates changed items

Name	Job	Country	Employee Number	Employee Eligibility	Merit	Market	Bonus	In-Lieu	Performance Bonus
Comp, Test 18	Administrator-IC.U..1067.GENAD...	US	1152203	Eligible	Ineligible	Eligible	Eligible	Eligible	Eligible

Comments For Approvers

Enter reason for making this person ineligible.

About this Page Privacy Statement

Preferences Diagnosics Home Logout Preferences Help

Copyright (c) 2008, Oracle. All rights reserved.

- 4) Enter the reason for making the person ineligible in the **Comments for Approvers** field.
- 5) Click on the icon.

ORACLE® Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Preferences Diagnosics Home Logout Preferences Help

Logged In As Workbench, Comp1

Confirmation

Changes of eligibility have been submitted for Approval.

About this Page Privacy Statement

Preferences Diagnosics Home Logout Preferences Help

Copyright (c) 2008, Oracle. All rights reserved.

- 6) Click on the button.
The *Compensation Allocations* window will open.

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	3,500.00 ↑	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0
Staff Benefits	1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	3,368.00 ↑	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.92
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	2,000.00 ↓	3.45	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00 ↓	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

Notice that the Merit columns are now grayed out.

Making an Employee Eligible for an ASI Component

In this example, we will change the eligibility status for the employee on line three and make them eligible for a Merit increase.

ORACLE®

Compensation Workbench

Plan Annual Salary Increase (ASI) Access Full Access

Diagnostics Home Logout Preferences Help

Compensation Workbench Home >

Logged In As Workbench, Comp1

Workbench, Comp1 : Compensation Allocations

Cancel Recalculate Save Finish

Compensation Summary - Team

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	3	4	4	4
Employees Receiving	3	1	1	1	1
% Receiving	75 %	33.3333 %	25 %	25 %	25 %
Total Eligible Salaries	217,840.80 USD	159,940.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	8,868.00 USD	3,500.00 USD	2,000.00 USD	1,368.00 USD	2,000.00 USD
Unused ASI Pool \$	(154.37) USD				
Average Allocated %	4.07 %	2.19 %	0.92 %	0.63 %	0.92 %

Options

- [Use Allocation Wizard](#)
- [Download To Spreadsheet](#)
- [Change Employee Eligibility](#)
- [Flexible Summary](#)
- [Audit History](#)

1

Employee Allocations

Find Name

Go

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	3,500.00 ↑	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	0
Staff Benefits	1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	3,368.00 ↑	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.92
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	2,000.00 ↓	3.45	57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00 ↓	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

Cancel Recalculate Save Finish

About this Page Privacy Statement

Diagnostics Home Logout Preferences Help

Copyright (c) 2008, Oracle. All rights reserved.

1) Click on the **Change Employee Eligibility** link.

Page 15 of 55

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Employee Eligibility

The change of an employee's eligibility status will change the aggregate eligible salary amounts for the employee's rollup (up to the highest manager). This can result in a change of budget amounts for those managers that have already established budgets.

Find Name Go View All Countries Direct Employees Eligible and Ineligible Go

Status	Name	Country	Employee Number	Job	Worksheet Manager	Overall EE Eligibility	Merit	Market	BIL	Perf Bonus
Comp, Test 1	US	1135277	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 18	US	1152203	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 2	US	1135303	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible

About this Page Privacy Statement Diagnosics Home Logout Preferences Help Copyright (c) 2006, Oracle. All rights reserved.

- 2) For the employee on line three we will select **Eligible** from the *Merit* drop down menu.
- 3) Click on the button.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Preferences Diagnosics Home Logout Preferences Help

Logged In As Workbench, Comp1

Review

Use this page to review eligibility or request a change of eligibility. Please notice that changes to eligibility may alter existing budget amounts for all higher managers because their Total Eligible Salary amounts will be increased or reduced.

Indicates changed items

Name	Job	Country	Employee Number	Employee Eligibility	Merit	Market	Bonus	In-Lieu	Performance Bonus
Comp, Test 18	Administrator-IC.U..1067.GENAD...	US	1152203	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible

Comments For Approvers

Enter the reason for making this employee eligible for a Merit increase.

About this Page Privacy Statement Preferences Diagnosics Home Logout Preferences Help Copyright (c) 2006, Oracle. All rights reserved.

- 4) Enter the reason for making the person eligible in the **Comments for Approvers** field.
- 5) Click on the button.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Preferences Diagnosics Home Logout Preferences

Logged In As Workbench, Comp1

Confirmation

Changes of eligibility have been submitted for Approval.

About this Page Privacy Statement Preferences Diagnosics Home Logout Preferences Copyright (c) 2006, Oracle. All rights reserved.

- 6) Click on the button.
The *Compensation Allocations* window will open

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Logged In As Workbench, Comp1

Workbench, Comp1 : Compensation Allocations

Options

- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

Compensation Summary - Team

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	4	4	4	4
Employees Receiving	3	1	1	1	1
% Receiving	75 %	25 %	25 %	25 %	25 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	8,868.00 USD	3,500.00 USD	2,000.00 USD	1,368.00 USD	2,000.00 USD
Unused ASI Pool \$	(154.37) USD				
Average Allocated %	4.07 %	1.61 %	0.92 %	0.63 %	0.92 %

Employee Allocations

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1135277	Comp, Test 1	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	3,500.00	6.74	55,416.80	26.64	Workbench, Comp1	40	3,500.00	6.74	0.00	
Staff Benefits	1150773	Comp, Test 17	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	68,400.00	32.88	3,368.00	4.92	70,400.00	33.85	Workbench, Comp1	40	0.00	0	2,000.00	2.92
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84	2,000.00	3.45	57,900.00	27.84	Workbench, Comp1	40				
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	

Options

- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

1

Notice that you may now enter data in the Merit columns.

Viewing Ineligible Employees

In this example, we would like to view all of our Ineligible Employees.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Logged In As Workbench, Comp1

Confirmation
Your changes have been saved.

Workbench, Comp1 : Compensation Allocations

Options

- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

Compensation Summary - Team

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	2	2	2	2	2
Employees Receiving	0	0	0	0	0
% Receiving	0 %	0 %	0 %	0 %	0 %
Total Eligible Salaries	97,524.00 USD	97,524.00 USD	97,524.00 USD	97,524.00 USD	97,524.00 USD
ASI Pool \$	3,900.96 USD				
ASI Pool %	4 %				
Total Allocated \$	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
Unused ASI Pool \$	3,900.96 USD				
Average Allocated %	0 %	0 %	0 %	0 %	0 %

Employee Allocations

Organization	Employee Number	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary
Staff Benefits	1152203	Comp, Test 18	Fulltime-Regular	U.42	Administrator-IC.U..1067.GENAD...	57,900.00	27.84			57,900.00	27.84	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1135303	Comp, Test 2	Fulltime-Regular	U.39	Staff Support.U..1060.GENAD...	39,624.00	19.05	0.00	0	39,624.00	19.05	Workbench, Comp1	40	0.00	0	0.00	0

Options

- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

1

1) Click on the **Change Employee Eligibility** link.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Employee Eligibility

The change of an employee's eligibility status will change the aggregate eligible salary amounts for the employee's rollup (up to the highest manager). This can result in a change of budget amounts for those managers that have already established budgets.

Find Name View All Countries Direct Employees **Eligible and Ineligible**

Status Name	Country	Employee Number	Job	Eligible and Ineligible	EE Eligibility	Merit	Market	BIL	Perf Bonus
Comp, Test 1	US	1135277	Staff Support.U..1060.GENAD...	2	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Eligible	Ineligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 18	US	1152203	Administrator-IC.U..1067.GENAD...	Eligible	Ineligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 19	US	1170052	Administrator-IC.U..1067.GENAD...	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 2	US	1135303	Staff Support.U..1060.GENAD...	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible

Diagnosics Home Logout Preferences Help

About this Page Privacy Statement Copyright (c) 2008, Oracle. All rights reserved

NOTE: All of your eligible and ineligible employees are listed on the page. You must run a query to view only those employees that are ineligible.

2) Select **Ineligible** from the *Eligible and Ineligible* drop down menu and click on the button.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Home Logout Preferences Help

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Employee Eligibility

The change of an employee's eligibility status will change the aggregate eligible salary amounts for the employee's rollup (up to the highest manager). This can result in a change of budget amounts for those managers that have already established budgets.

Find Name View All Countries Direct Employees **Ineligible**

Status Name	Country	Employee Number	Job	Worksheet Manager	Overall EE Eligibility	Merit	Market	BIL	Perf Bon
Comp, Test 1	US	1135277	Staff Support.U..1060.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 19	US	1170052	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible

Diagnosics Home Logout Preferences Help

About this Page Privacy Statement Copyright (c) 2008, Oracle. All rights reserved

3) In order to make an employee **Eligible**, follow the steps used on **page 16** to make an employee eligible for a specific ASI Component however, in this case, you would change **all** of the columns (Overall EE Eligibility, Merit, Market, BIL and Perf Bonus) from Ineligible to Eligible for that employee.

CAUTION: By only changing the Overall EE Eligibility column to Eligible, you will be able to view that employee in the Compensation Allocations page however, none of the ASI Component columns will be available for data entry.

Using the Download to Spreadsheet Feature (PC Only)

Downloading the Spreadsheet

This feature allows you to download your employee information in an excel spreadsheet, make your entries and then upload them back into Oracle. This is **not** available for MAC users. After downloading the spreadsheet, you may enter your allocations and then upload them immediately or you may save the spreadsheet and upload at a later time.

Changes must be made to Excel and Internet Explorer before using this feature. Please view the **Excel Settings Required for Download** and **Internet Explorer Settings Required for Download** sections before trying to download the spreadsheet. We also recommend downloading the Macro created that adds additional columns on the spreadsheet, such as Merit % and Market %, so that you may enter your allocations in percentages rather than dollar amounts. The Macro, called **CWB Formatter**, is available for download as an Add-In on the CWB documentation page.

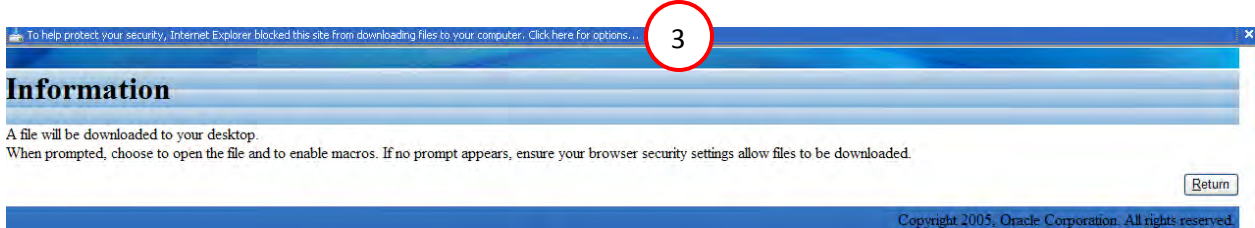
The screenshot shows the Oracle Compensation Workbench interface. At the top, there is a navigation bar with 'ORACLE Compensation Workbench' and 'Plan Annual Salary Increase (ASI) Access Full Access'. Below this, there are links for 'Home', 'Logout', 'Preferences', and 'Help'. The main content area is titled 'Workbench, Comp1 : Compensation Allocations'. On the right side, there is an 'Options' dialog box with a red circle around the 'Download To Spreadsheet' link. The dialog box also contains links for 'Use Allocation Wizard', 'Change Employee Eligibility', 'Flexible Summary', and 'Audit History'. Below the dialog box, there is a table with columns for 'Organization', 'Employee #', 'Employee', 'Employment Category', 'Grade', 'Classification', 'Current Base Pay', 'Current Hrly Rate', 'Total ASI \$', 'Total ASI %', 'New Base Pay', 'New Hourly Rate', 'Supervisor', 'Salary Basis', 'Normal Hours', 'Merit \$', 'Merit as % of Eligible Salary', 'Market Adjustment \$', and 'Market Adj of % of Eligible Salary'. The table contains two rows of data for 'Staff Benefits' employees.

Organization	Employee #	Employee	Employment Category	Grade	Classification	Current Base Pay	Current Hrly Rate	Total ASI \$	Total ASI %	New Base Pay	New Hourly Rate	Supervisor	Salary Basis	Normal Hours	Merit \$	Merit as % of Eligible Salary	Market Adjustment \$	Market Adj of % of Eligible Salary
Staff Benefits	1966569	Comp, Test17	Fulltime-Regular	U.42	Administrator-IC.U.1067.GENAD...	102,000.00	49.04	0.00	0.00	102,000.00	49.04	Workbench, Comp1	Salary	40	0.00	0	0.00	
Staff Benefits	1954569	Comp, Test2	Fulltime-Regular	U.39	Staff Support.U.1060.GENAD...	41,600.00	20.00	0.00	0.00	41,600.00	20.00	Workbench, Comp1	Hourly	40	0.00	0	0.00	

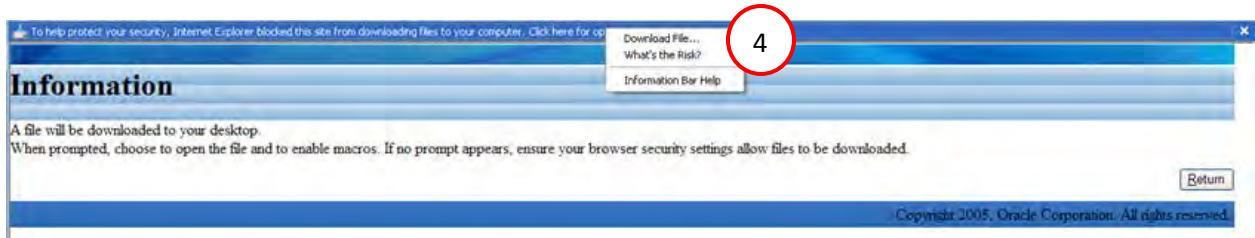
1) Click on the **Download to Spreadsheet** link.



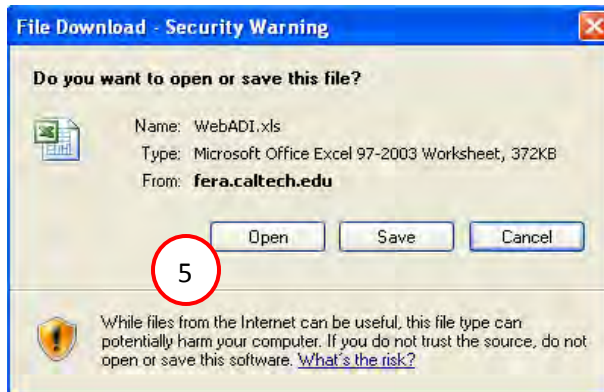
2) Click on the **Download Default Definition** button.



3) Click on **Click here for options....**

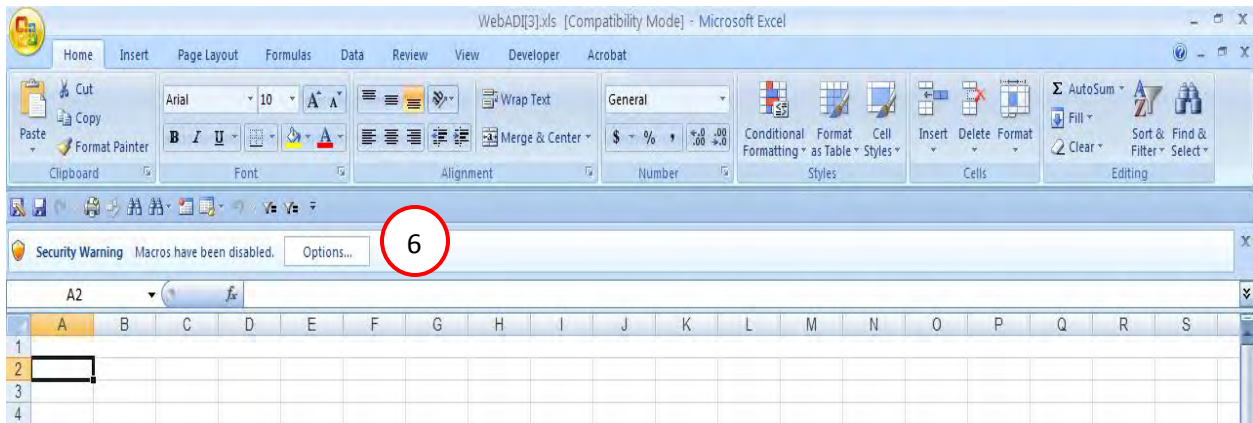


4) Click on **Download File...**

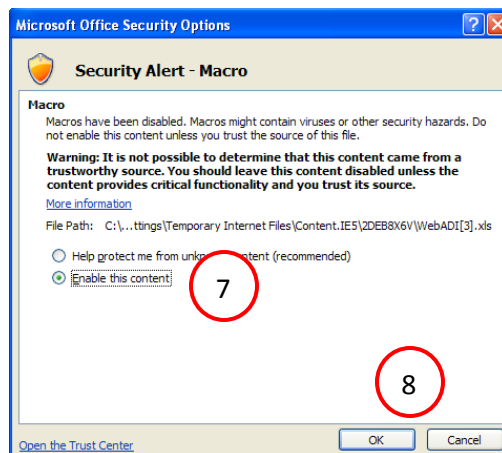


5) Click on **Open**.

An Excel spreadsheet will open.



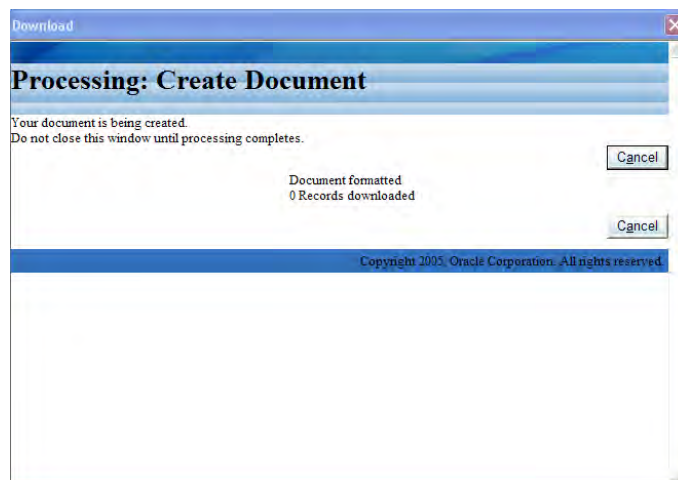
6) Click on **Options...**



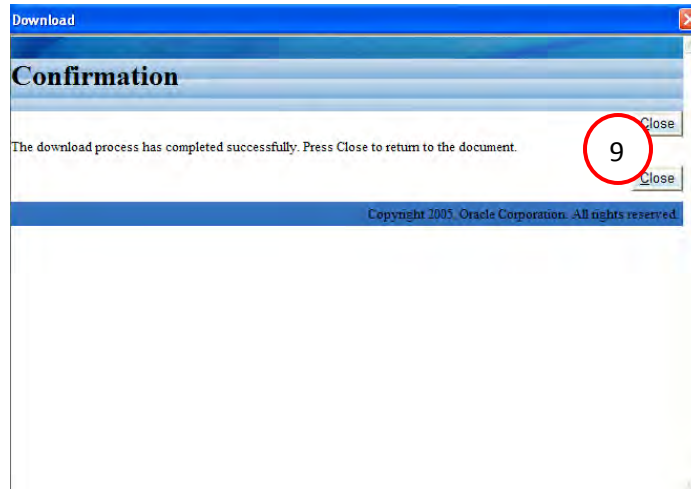
7) Click on the **Enable this content** radio button.

8) Click on the **OK** button.

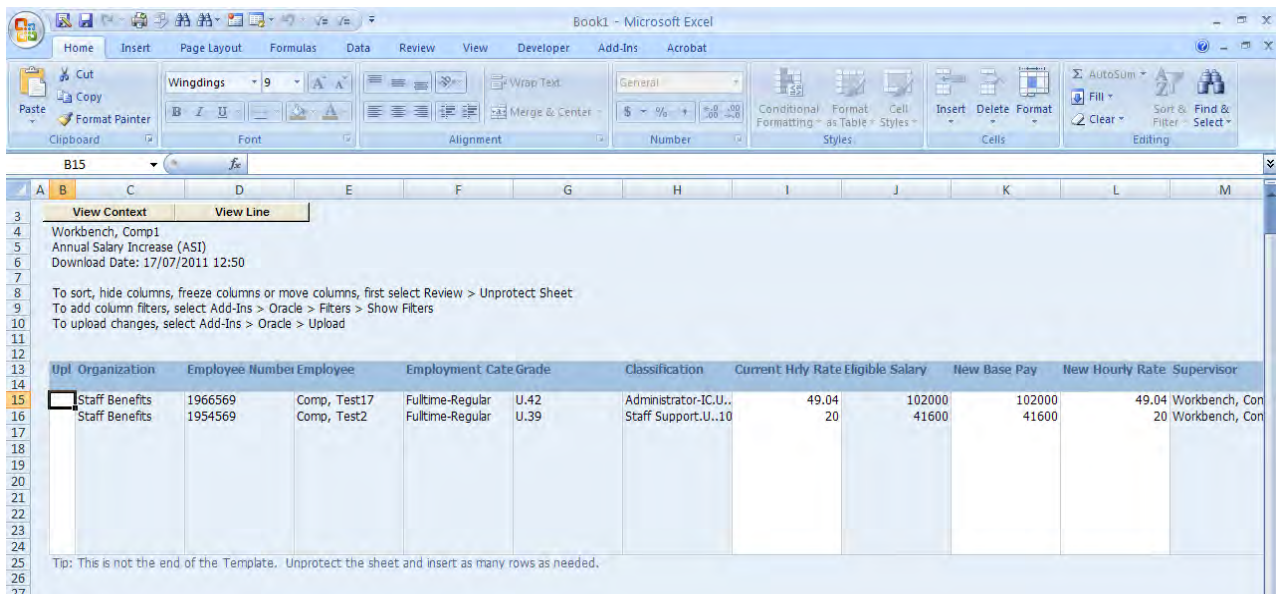
The *Download* window will open



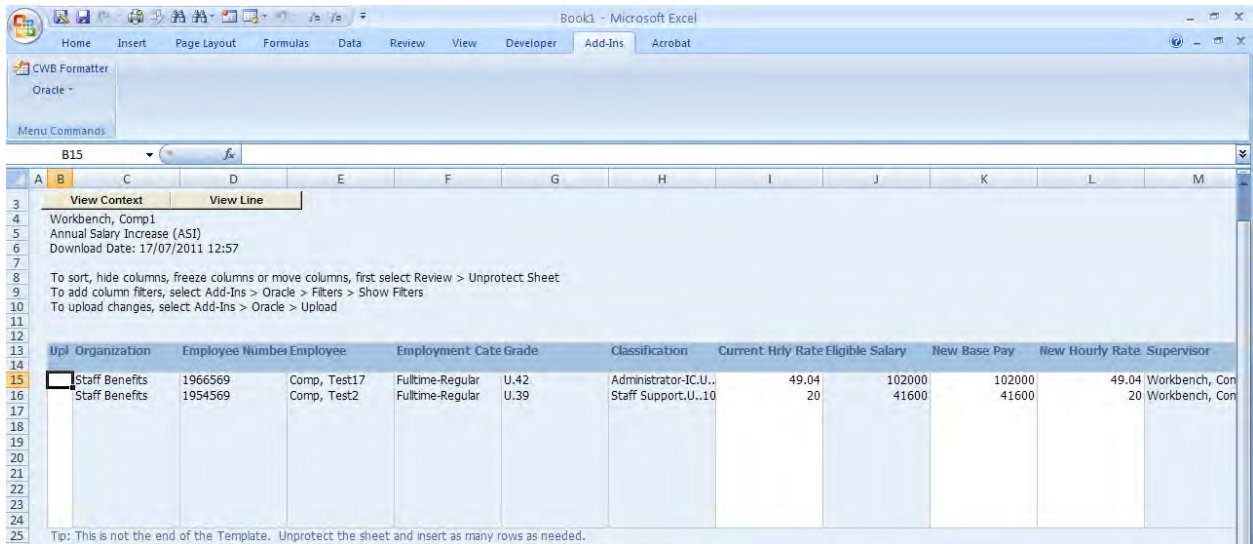
Once the download is complete the following Confirmation window will appear (the download process may take a few minutes).



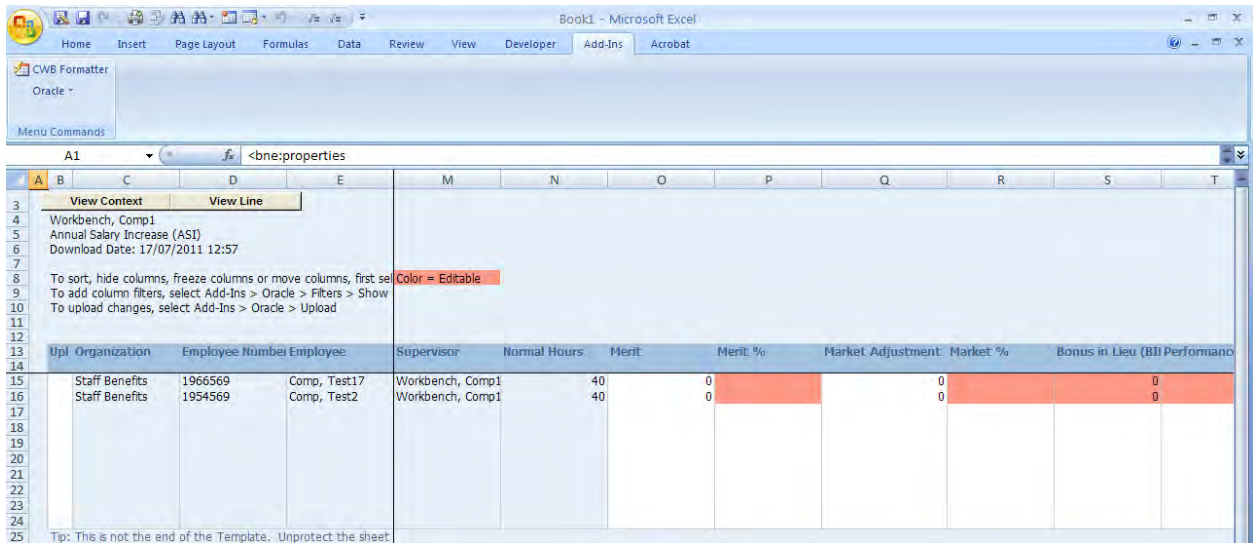
9) Click on the **Close** button.



At this point, you may begin to enter your allocations on the spreadsheet. Using the default spreadsheet format, you must enter the allocations in dollars only however, if you would prefer to enter your allocations as **percentages**, please run the CWB_Formatter macro available in the Add-Ins menu. Whether you upload your spreadsheet immediately or save it to upload at a future time, we recommend using the CWB Formatter macro for ease of entering your allocations. Please follow the instructions in the video for **Downloading the CWB Formatter** macro before proceeding to **step 10**.



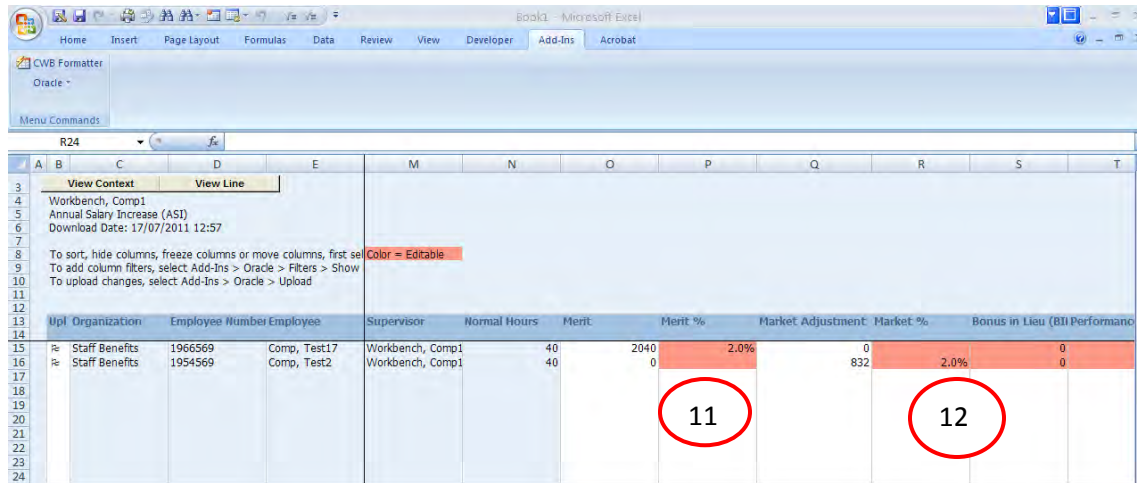
10) Click on the **Add-Ins** tab and click on **CWB Formatter**.



Once you have run the macro, two additional columns (Merit % and Market %) are created. You may enter your percentages in these columns. Only enter data in columns that are highlighted in color.

Entering Allocations via the Spreadsheet

For this example we will give the employee on line one a Merit increase and the employee on line two a Market Adjustment increase.



The screenshot shows a Microsoft Excel spreadsheet with the following data:

Upl	Organization	Employee Number	Employee	Supervisor	Normal Hours	Merit	Merit %	Market Adjustment	Market %	Bonus in Lieu (BII Performance)
Re	Staff Benefits	1966569	Comp, Test17	Workbench, Comp1	40	2040	2.0%	0	0	0
Re	Staff Benefits	1954569	Comp, Test2	Workbench, Comp1	40	0		832	2.0%	0

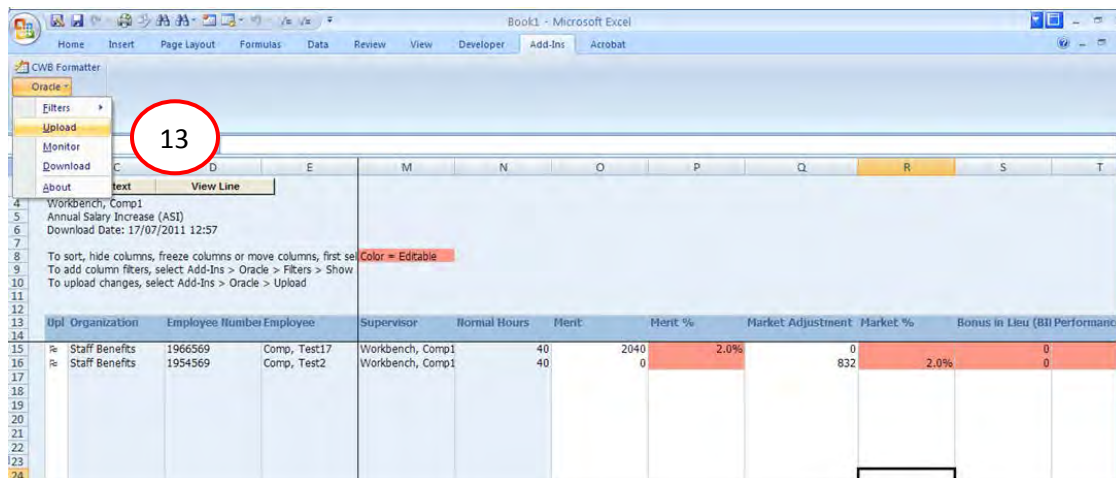
Red circles are drawn around the 'Merit %' column (column P) and the 'Market %' column (column R) in the second row of data.

11) Scroll to column P of the spreadsheet and enter **2%** in the *Merit %* column.

12) Scroll to column R of the spreadsheet and enter **2%** in the *Market %* column.

NOTE: If you are ready to upload your changes proceed to **step 13**. If not, follow the instructions for *saving the spreadsheet* on **page 27**.

Performing an Immediate Upload of the Spreadsheet (not saving)



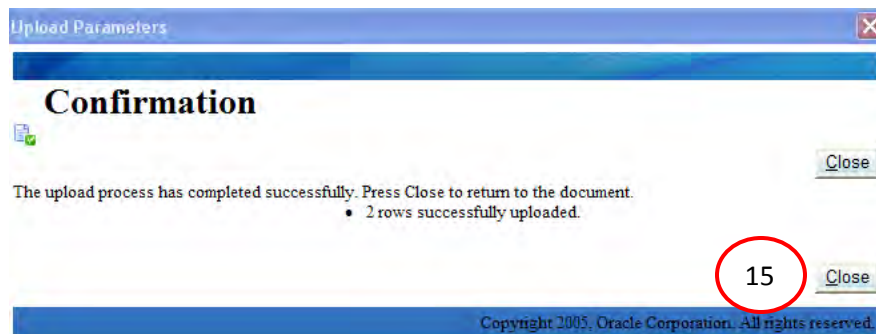
The screenshot shows the Oracle menu open in the spreadsheet application. The 'Upload' option is highlighted with a red circle and the number 13. The spreadsheet data is the same as in the previous image.

13) Select **Upload** from the *Oracle* menu.



14) Click on the **Upload** button.

The Confirmation window will appear.

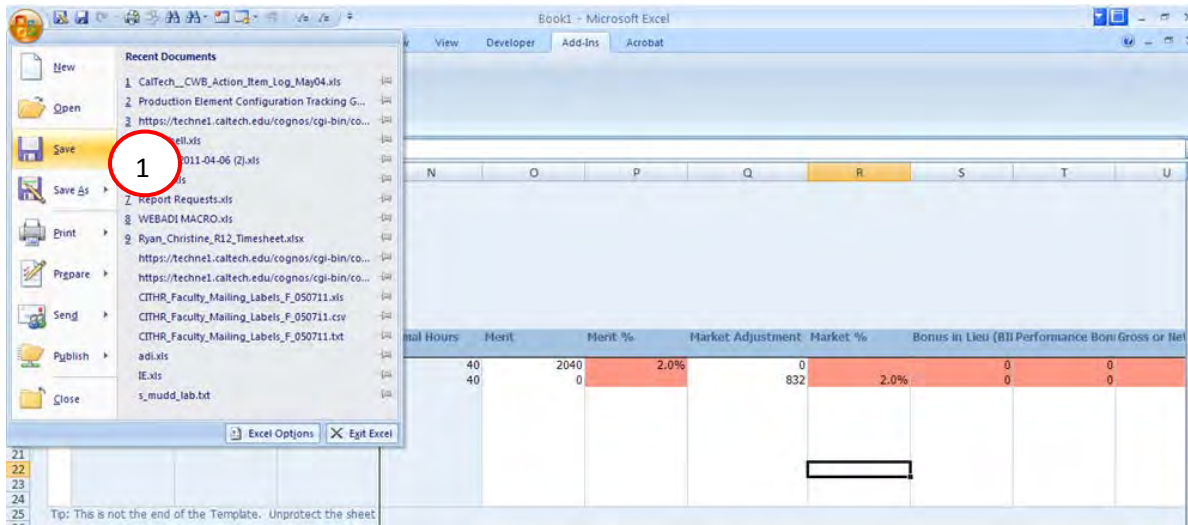


15) Click on the **Close** button.

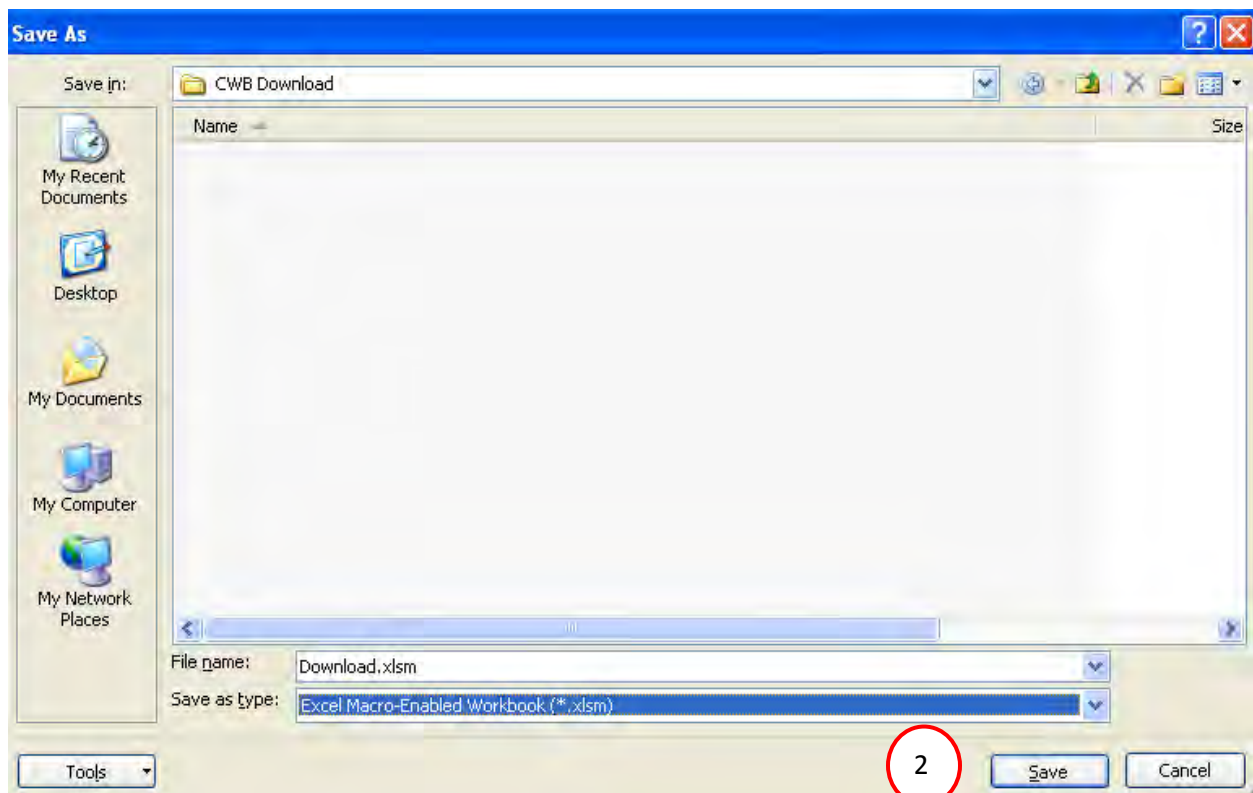
16) Close the spreadsheet. At the Excel prompt you may select *No* to save changes.

17) Select the **Return** button to return to the *Compensation Allocations* page to view your uploaded allocations.

Saving the Spreadsheet



1) Select **Save** from the *Office Button*.

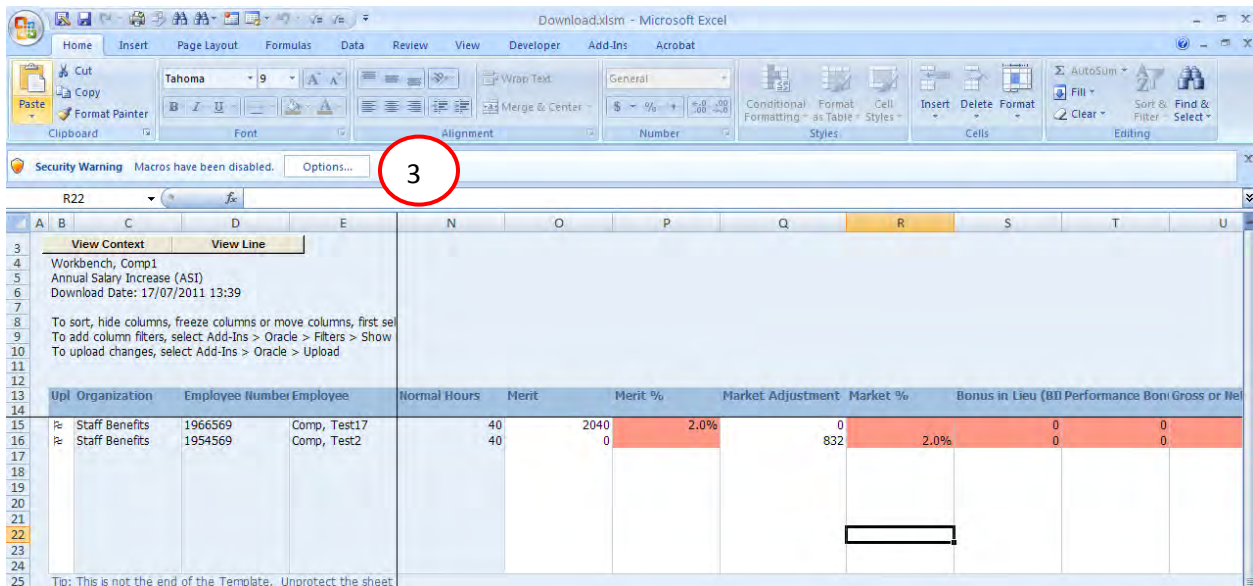


2) Change the *Save as type* to **Excel Macro-Enabled Workbook (*.xsm)**, enter a **File Name** and click on the **Save** button.

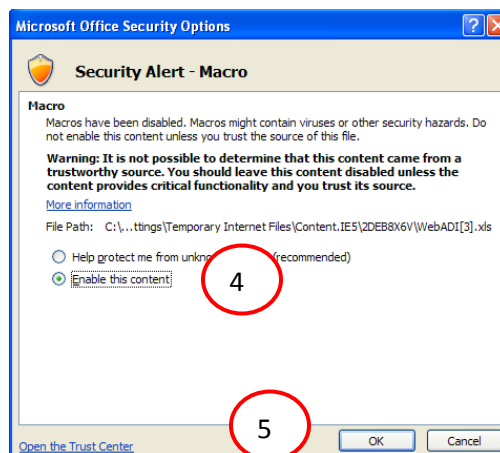
Uploading a Saved Spreadsheet

In order to upload a saved spreadsheet you must first log into Compensation Workbench, download a **new** spreadsheet (follow instructions on pages 20 through 23). Once the new spreadsheet has been downloaded, locate your saved spreadsheet and then upload your saved spreadsheet.

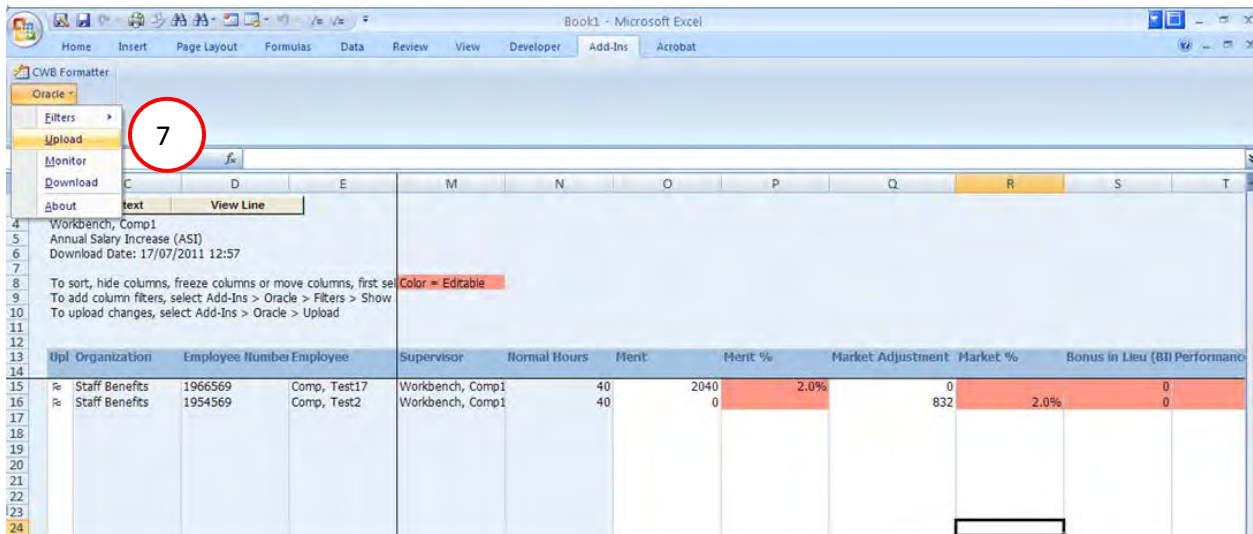
- 1) Follow the instructions on pages 20 through 23 to download a new spreadsheet.
- 2) Locate your saved spreadsheet.



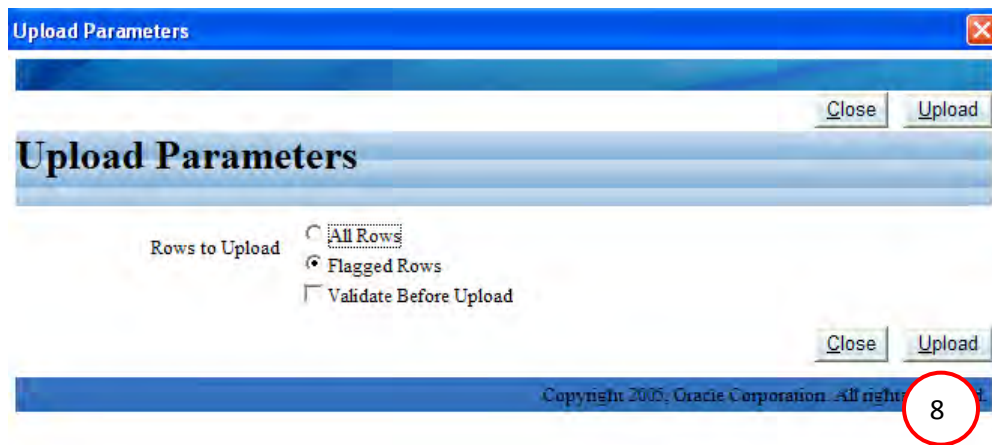
- 3) Click on **Options...**



- 4) Click on the **Enable this content** radio button.
- 5) Click on the **OK** button.
- 6) Enter Additional allocations if necessary.

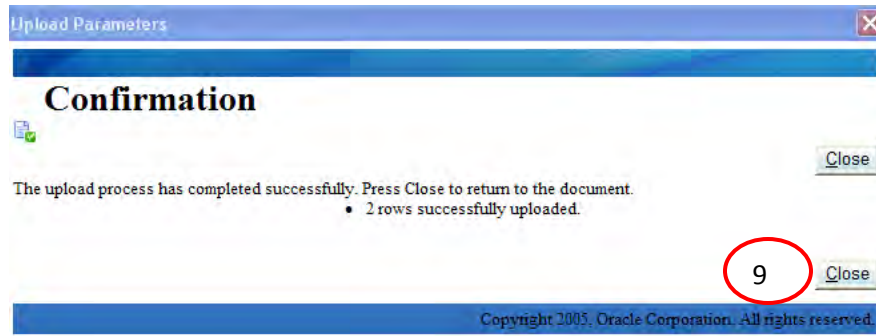


7) Select **Upload** from the *Oracle* menu.



8) Click on the **Upload** button.

The Confirmation window will appear.



- 9) Click on the **Close** button.
- 10) Close the spreadsheet. At the Excel prompt you may select No to save changes.
- 11) Select the **Return** button to return to the *Compensation Allocations* page to view your uploaded allocations.

Using the Flexible Summary Report

The Flexible Summary Report allows you to view summarized information for your employees.

The screenshot shows the Oracle Compensation Workbench interface. The main menu bar includes 'ORACLE Compensation Workbench', 'Plan Annual Salary Increase (ASI)', 'Access Full Access', 'Diagnostics', 'Preferences', 'Help', and 'Close Window'. The user is logged in as 'Workbench, Comp1'. The page title is 'Workbench, Comp1 : Compensation Allocations'. Below the title bar, there are buttons for 'Cancel', 'Recalculate', 'Save', and 'Finish'. The main content area is divided into two sections: 'Compensation Summary - Team' and 'Employee Allocations'. The 'Compensation Summary - Team' section contains a table with columns: Total, Merit, Market Adjustment, Bonus In-Lieu, and Performance Bonus. The 'Employee Allocations' section contains a table with columns: Organization, Employee Number, Employee Name, Employment Category, Grade/Classification, Current Base Pay, Current Hrly Rate, Total ASI \$, Total ASI %, New Base Pay, New Hourly Rate, Supervisor, Normal Hours, Merit, Merit as % of Eligible Salary, Market Adjustment, and Market Adj as % of Eligible Salary. In the 'Options' panel on the right, the 'Flexible Summary' link is circled in red with the number '1'.

1) Click on the **Flexible Summary** link.

The screenshot shows the Oracle Compensation Workbench interface displaying the 'Flexible Summary of Compensation Allocations' report. The main menu bar is the same as in the previous screenshot. The page title is 'Flexible Summary of Compensation Allocations'. Below the title bar, there are buttons for 'Download' and 'Return'. The main content area is divided into two sections: 'Grand Totals - Annual Salary Increase (ASI)' and 'Flexible Summary'. The 'Grand Totals - Annual Salary Increase (ASI)' section contains a table with columns: Eligible Employees, Employees Receiving, % Receiving, Total Eligible Salaries, ASI Pool, ASI Pool as % of Total Eligible Salaries, Total Allocated, Total Allocated as % of Total Eligible Salaries, and Unused ASI Pool. The 'Flexible Summary' section contains a table with columns: First Grouping, Second Grouping, Eligible Employees, Total Eligible Salaries, Total Allocated, Total Allocated as % of Eligible Salaries, Employees Receiving, % of Employees Receiving, ASI Pool, ASI Pool as % of Eligible Salaries, and Unused ASI Pool. In the 'Flexible Summary' section, the 'Job' option is selected in the 'First Grouping' dropdown menu, and the 'Go' button is circled in red with the number '3'. The number '2' is also circled in red, pointing to the 'Flexible Summary' section header.

2) Select **Job** from the *First Grouping* drop down menu.

3) Click on the **Go** button.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Flexible Summary of Compensation Allocations

Switch to Annual Salary Increase (ASI) Go Show decimal amounts

Grand Totals - Annual Salary Increase (ASI)

Eligible Employees	4
Employees Receiving	3
% Receiving	75.0 %
Total Eligible Salaries	217,841 USD
ASI Pool	8,714 USD
ASI Pool as % of Total Eligible Salaries	4 %
Total Allocated	8,868 USD
Total Allocated as % of Total Eligible Salaries	4.07 %
Unused ASI Pool	(154) USD

Flexible Summary

First Grouping Job Second Grouping Grade Go

General Summary

Expand All Collapse All

	Eligible Employees	Total Eligible Salaries	Total Allocated	Total Allocated as % of Eligible Salaries	Employees Receiving	% of Employees Receiving
Job						
Administrator-IC.U..1067.GENAD...	2	126,300	5,368	4.25	2	100
Staff Support.U..1060.GENAD...	2	91,541	3,500	3.82	1	50

Download Return

About this Page Privacy Statement

Diagnosics Preferences Help Close Window

Copyright (c) 2006, Oracle. All rights reserved.

- 4) Select **Grade** from the *Second Grouping* drop down menu.
- 5) Click on the **Go** button.

ORACLE Compensation Workbench
Plan Annual Salary Increase (ASI) Access Full Access

Diagnosics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1

Flexible Summary of Compensation Allocations

Switch to Annual Salary Increase (ASI) Go Show decimal amounts

Grand Totals - Annual Salary Increase (ASI)

Eligible Employees	4
Employees Receiving	3
% Receiving	75.0 %
Total Eligible Salaries	217,841 USD
ASI Pool	8,714 USD
ASI Pool as % of Total Eligible Salaries	4 %
Total Allocated	8,868 USD
Total Allocated as % of Total Eligible Salaries	4.07 %
Unused ASI Pool	(154) USD

Flexible Summary

First Grouping Job Second Grouping Grade Go

General Summary

Expand All Collapse All

	Eligible Employees	Total Eligible Salaries	Total Allocated	Total Allocated as % of Eligible Salaries	Employees Receiving	% of Employees Receiving
Job/Grade						
Administrator-IC.U..1067.GENAD...	2	126,300	5,368	4.25	2	100
U,42	2	126,300	5,368	4.25	2	100
Staff Support.U..1060.GENAD...	2	91,541	3,500	3.82	1	50
U,39	2	91,541	3,500	3.82	1	50

Download Return

About this Page Privacy Statement

Diagnosics Preferences Help Close Window

Copyright (c) 2006, Oracle. All rights reserved.

You may now view your ASI allocations broken down by the employee Job and Grade information.

- 6) Click on the **Return** button to return to the *Compensation Allocations* page.

Audit History Report

The Audit History Report allows you to view changes made in the Compensation Workbench. You may view these changes based on audit types for a specific plan and plan period or by a specific employee.

The screenshot shows the Oracle Compensation Workbench interface. The 'Options' menu is open, and the 'Audit History' link is circled in red with the number '1' next to it. The 'Compensation Summary - Team' table is visible above, and the 'Employee Allocations' table is visible below.

	Total	Merit	Market Adjustment	Bonus In-Lieu	Performance Bonus
Eligible Employees	4	4	4	4	4
Employees Receiving	3	1	1	1	1
% Receiving	75 %	25 %	25 %	25 %	25 %
Total Eligible Salaries	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD	217,840.80 USD
ASI Pool \$	8,713.63 USD				
ASI Pool %	4 %				
Total Allocated \$	8,868.00 USD	3,500.00 USD	2,000.00 USD	1,368.00 USD	2,000.00 USD
Unused ASI Pool \$	(154.37) USD				
Average Allocated %	4.07 %	1.61 %	0.92 %	0.63 %	0.92 %

1) Click on the **Audit History** link.

The screenshot shows the Oracle Compensation Workbench 'Audit History' report. The 'Updates since' dropdown menu is set to 'Last 2 Days', which is circled in red with the number '2'. The 'Go' button is also circled in red with the number '3'. The report table below shows a list of audit changes.

Employee Name	Audit Description	Plan	Old Value	New Value	Change Date	Change Time	Changed By
Comp, Test 18	Update Eligibility Status	Merit	Ineligible	Eligible	06-Jun-2011	16:56:21	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Market Adjustment	Ineligible	Eligible	06-Jun-2011	16:42:20	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Market Adjustment	Eligible	Ineligible	06-Jun-2011	16:38:53	Workbench, Comp1
Comp, Test 18	Update Compensation Amount	Market Adjustment	0.00		06-Jun-2011	16:38:53	Workbench, Comp1
Comp, Test 18	Update Compensation Amount	Merit	0.00		06-Jun-2011	16:37:23	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Merit	Eligible	Ineligible	06-Jun-2011	16:37:23	Workbench, Comp1
Comp, Test 18	Update Compensation Amount	Annual Salary Increase (ASI)	3,000.00	2,000.00	06-Jun-2011	14:56:37	Workbench, Comp1

2) Select **Last 2 Days** from the *Updates since* drop down menu.

3) Click on the **Go** button.

You may also further define your results by selecting additional criteria such as Employees to Include, Audit Description or Changes Made By.

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says "ORACLE Compensation Workbench Plan Annual Salary Increase (ASI) Access Full Access". There are navigation links for "Diagnostics", "Preferences", "Help", and "Close Window". Below the header, it says "Compensation Workbench Home > Compensation Allocations > Logged In As Workbench, Comp1". The main section is titled "Audit History" and contains the text: "This report shows all changes that have been made within your roll-up. This report can assist in determining the source of fluctuations on your worksheet." A "Return" button is located to the right of this text.

Below the text is a "Search" section with several dropdown menus: "Updates since" (set to "Last 2 Days"), "Employees To Include", "Audit Description" (set to "Update Eligibility Status", circled with a red circle and the number 4), and "Changes Made By". A "Go" button (circled with a red circle and the number 5) is located below these menus.

Below the search section is a table with the following data:

Employee Name	Audit Description	Plan	Old Value	New Value	Change Date	Change Time	Changed By
Comp, Test 18	Update Eligibility Status	Merit	Ineligible	Eligible	06-Jun-2011	16:56:21	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Market Adjustment	Ineligible	Eligible	06-Jun-2011	16:42:20	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Market Adjustment	Eligible	Ineligible	06-Jun-2011	16:38:53	Workbench, Comp1
Comp, Test 18	Update Eligibility Status	Merit	Eligible	Ineligible	06-Jun-2011	16:37:23	Workbench, Comp1

A "Return" button (circled with a red circle and the number 6) is located to the right of the table.

At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2008, Oracle. All rights reserved."

- 4) Select **Update Eligibility Status** from the *Audit Description* drop down menu.
- 5) Click on the **Go** button.
- 6) Click on the **Return** button to return to the *Compensation Allocations* page.

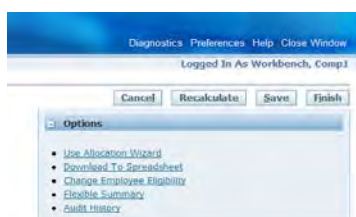
Notes and Attachments

You have the ability to save Notes and/or Attachments at an individual Employee level however, this information is only available during this ASI period. Once we enter a new ASI period they will no longer be available as they are not saved in the database.

Adding a Note

For this example, we will add a note to the record of the employee on line one.

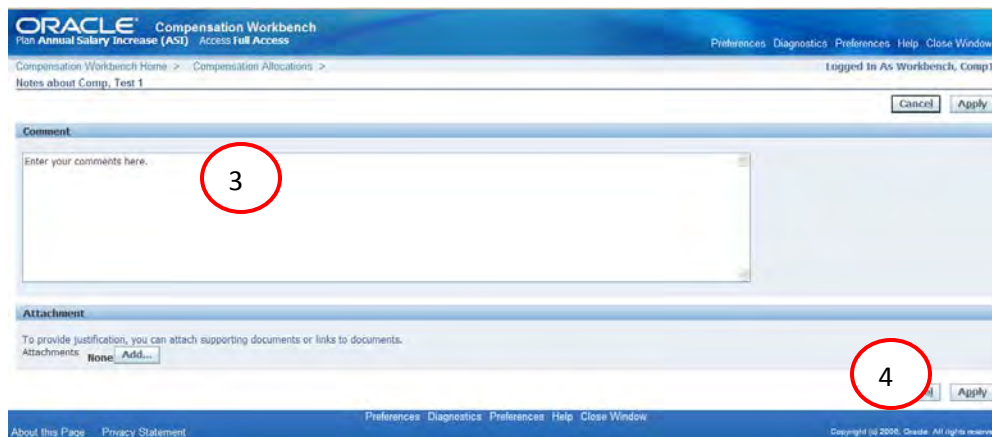
- 1) Within the Employee Allocations section of the Compensation Allocations page, locate the record of the employee you would like to add a note.



A screenshot of the Oracle Compensation Workbench 'Compensation Allocations' table. The table has columns for 'New', 'Early', 'Rate', 'Supervisor', 'Normal', 'Hours', 'Merit', 'Merit as % of Eligible Salary', 'Market Adj as % of Eligible Salary', 'Market of Eligible Salary', 'Bonus in Line', 'BL as % of Eligible Salary', 'Performance Bonus', 'Perf Bonus as % of Eligible Salary', 'Employee Gross or Net', 'Message', 'Notes', 'Target %', 'Minimum Target %', and 'Maximum Target %'. The first row is highlighted and has a red circle with the number '2' around the 'Notes' icon.

New	Early	Rate	Supervisor	Normal	Hours	Merit	Merit as % of Eligible Salary	Market Adj as % of Eligible Salary	Market of Eligible Salary	Bonus in Line	BL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Salary	Employee Gross or Net	Message	Notes	Target %	Minimum Target %	Maximum Target %
1.84	Workbench, 40	Comp1		3,500.00	6.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				4	2	6
1.85	Workbench, 40	Comp1		0.00	0	2,000.00	2.92	1,368.00	2	0.00	0	2,000.00	3.45				4	2	6
1.84	Workbench, 40	Comp1								0.00	0						4	2	6
1.85	Workbench, 40	Comp1		0.00	0	0.00	0	0.00	0	0.00	0	0.00	0				4	2	6

- 2) Click on the **Notes** icon for the employee on line one.



A screenshot of the Oracle Compensation Workbench 'Notes about Comp, Test 1' dialog box. The window title is 'ORACLE Compensation Workbench Plan Annual Salary Increase (ASI) Access Full Access' and it shows 'Logged In As Workbench, Comp1'. At the top are buttons for 'Cancel' and 'Apply'. Below is a 'Comment' section with a text area containing 'Enter your comments here.' and a red circle with the number '3' around it. Below that is an 'Attachment' section with a button for 'None_Add...'. At the bottom right is a red circle with the number '4' around the 'Apply' button.

- 3) Enter information in the **Comments** field.
- 4) Click on the **Apply** button.

Deleting a Note

For this example, we will add a note to the record of the employee on line one.

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says 'ORACLE Compensation Workbench' and 'Plan Annual Salary Increase (ASI) Access Full Access'. Below that, there are navigation links: 'Compensation Workbench Home > Compensation Allocations >'. The user is logged in as 'Workbench, Comp1'. The main area is titled 'Notes about Comp, Test 1'. There is a 'Comment' field with a red circle and the number '1' inside it. Below the comment field is an 'Attachment' section with a red circle and the number '2' next to the 'Apply' button.

- 1) Delete the information in the **Comments** field.
- 2) Click on the **Apply** button.

Adding an Attachment

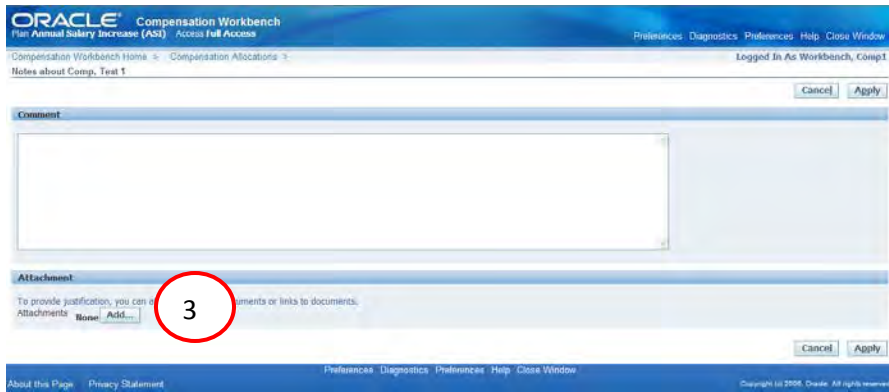
For this example, we will add an attachment to the record of the employee on line one.

- 1) Within the Employee Allocations section of the Compensation Allocations page, locate the record of the employee you would like to add a note.

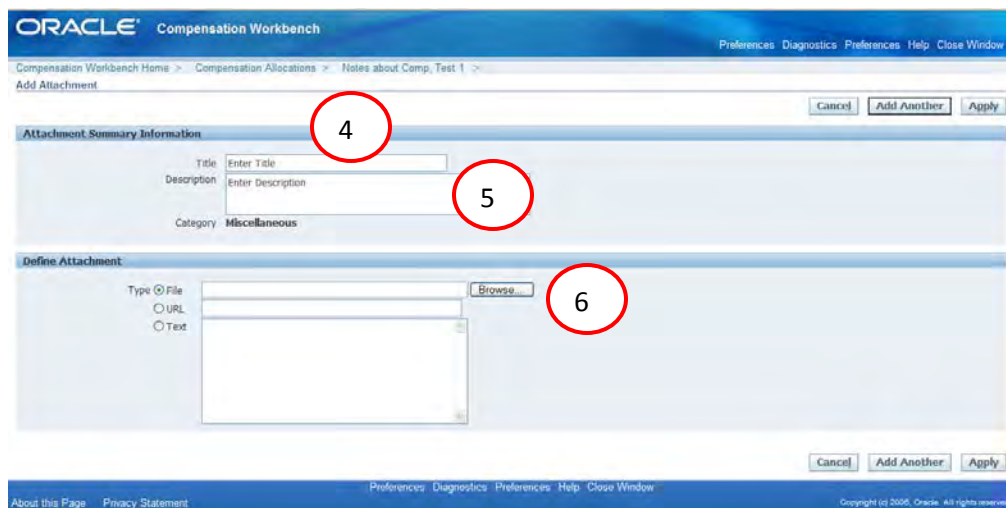
The screenshot shows the Oracle Compensation Workbench interface. At the top, it says 'Diagnostics Preferences Help Close Window' and 'Logged in As Workbench, Comp1'. Below that, there are navigation links: 'Cancel Recalculate Save Finish'. The main area is titled 'Options' and contains a list of options: 'Use Allocation Wizard', 'Download To Spreadsheet', 'Change Employee Eligibility', 'Flexibility Summary', and 'Audit History'. Below the options is a table of employee allocations. The table has columns for 'Employee', 'Normal Rate/Supervisor Hours', 'Merit', 'Market Adjustment', 'Market Adj as % of Eligible Salary', 'Bonus in Lieu of Eligible Salary', 'BL as % of Eligible Salary', 'Performance Bonus', 'Perf Bonus as % of Eligible Employee Gross Salary', 'Details', 'Net', 'Messages', 'Notes', 'Target %', 'Minimum Target %', and 'Maximum Target %'. The 'Notes' icon in the second row is highlighted with a red circle and the number '2'.

Employee	Normal Rate/Supervisor Hours	Merit	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in Lieu of Eligible Salary	BL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Employee Gross Salary	Details	Net	Messages	Notes	Target %	Minimum Target %	Maximum Target %
1.64 Workbench, 40 Comp1	3,500.00	6.74	0.00	0	0.00	0	0.00	0					4	2	6
1.85 Workbench, 40 Comp1	0.00	0	2,000.00	2.92	1,368.00	2	0.00	0					4	2	6
7.84 Workbench, 40 Comp1					0.00	0	2,000.00	3.45		Net			4	2	6
1.05 Workbench, 40 Comp1	0.00	0	0.00	0	0.00	0	0.00	0					4	2	6

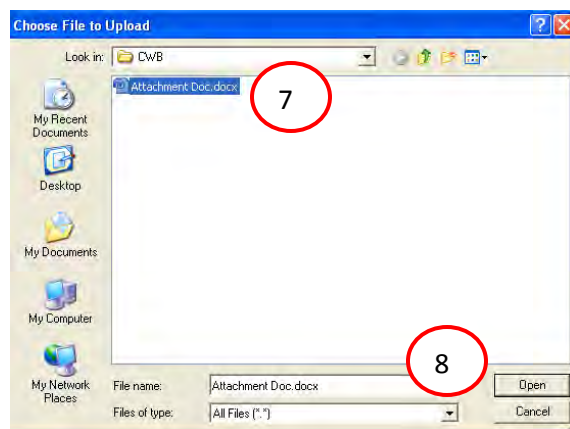
- 2) Click on the **Notes** icon for the employee on line one.



3) Click on the **Add...** button.



- 4) Enter a **Title**.
- 5) Enter a **Description**.
- 6) Click on the **Browse...** button.



- 7) Locate your attachment.
- 8) Click on the **Open** button.

9) Click on the **Apply** button.

A *Confirmation* message will appear

10) Click on the **Apply** button.

Updating an Attachment

For this example, we will update the Title and Description of an existing attachment.

The screenshot shows the Oracle Compensation Workbench interface. At the top, there are menu items: Diagnostics, Preferences, Help, Close Window. Below that, it says "Logged In As Workbench, Comp1". There are buttons for Cancel, Recalculate, Save, and Finish. An "Options" menu is open, showing links for Use Allocation Wizard, Download To Spreadsheet, Change Employee Eligibility, Flexible Summary, and Audit History.

Employee	Normal Hours	Merit	Merit as % of Eligible Salary	Market Adjustment	Market Adj as % of Eligible Salary	Bonus in Lieu (BIL)	BIL as % of Eligible Salary	Performance Bonus	Perf Bonus as % of Eligible Salary	Employee Gross or Net	Message	Notes	Target %	Minimum Target %	Maximum Target %
5.64 Workbench, Comp1	40	3,500.00	6.74	0.00	0	0.00	0	0.00	0	Net		1	4	2	6
3.85 Workbench, Comp1	40	0.00	0	2,000.00	2.92	1,368.00	2	0.00	0	Net			4	2	6
7.84 Workbench, Comp1	40					0.00	0	2,000.00	3.45	Net			4	2	6
7.05 Workbench, Comp1	40	0.00	0	0.00	0	0.00	0	0.00	0	Net			4	2	6

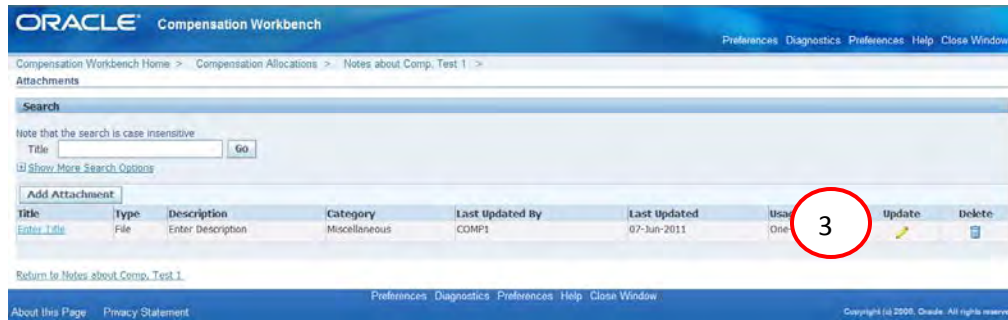
At the bottom, there are buttons for Cancel, Recalculate, Save, and Finish, and a copyright notice: Copyright (c) 2006, Oracle. All rights reserved.

- 1) Locate the record of the employee you would like to modify the attachment and click on the **Notes** icon.

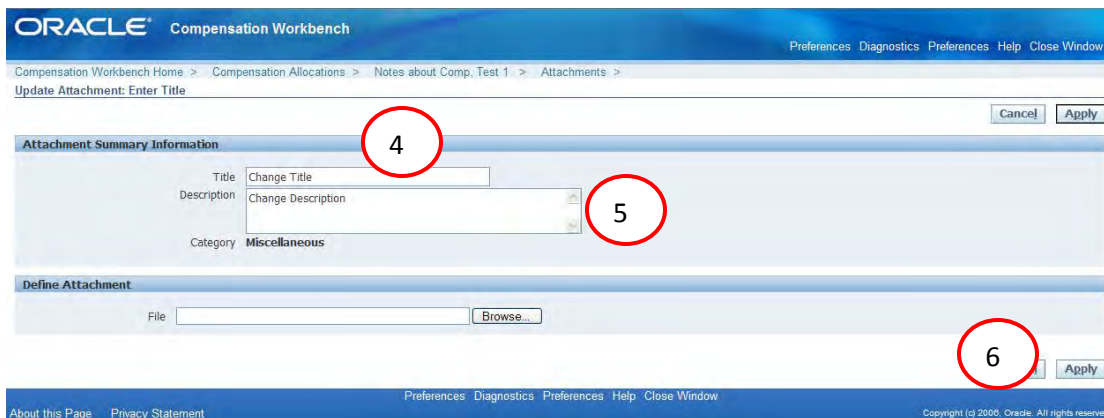
The screenshot shows the Oracle Compensation Workbench interface. At the top, there are menu items: Preferences, Diagnostics, Preferences, Help, Close Window. Below that, it says "Logged In As Workbench, Comp1". There are buttons for Cancel and Apply.

The main content area is titled "Notes about Comp, Test 1". There is a "Comment" section with a text area. Below that is the "Attachment" section. It says "To provide justification, attach supporting documents or links to documents." and "Attachments View". A red circle highlights the "View" link. An "Attachments" dialog box is open, showing a table with columns for Title, Type, and Details. The table contains one row: "Attachment Doc.docx". There are buttons for Update and Delete. At the bottom, there are buttons for Cancel and Apply, and a copyright notice: Copyright (c) 2006, Oracle. All rights reserved.

- 2) Click on the **View** link.



3) Click on the **Update**  icon.



- 4) Update the **Title** information.
- 5) Update the **Description** information.
- 6) Click on the **Apply** button.

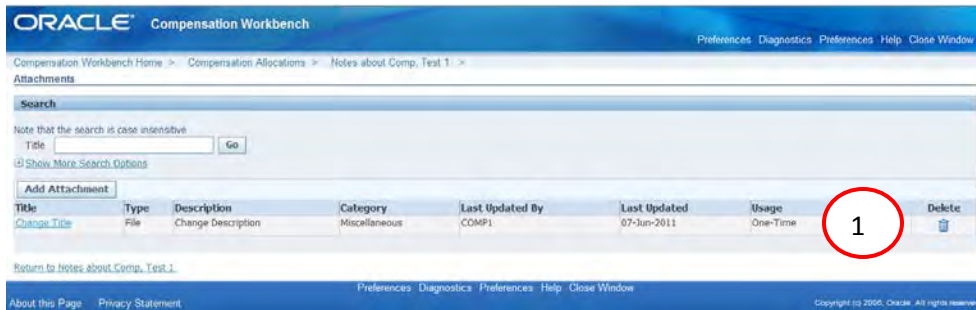
A *Confirmation* message will appear



Note: You must click on the **Return to Notes about (employee name)** or else your changes will not be saved.

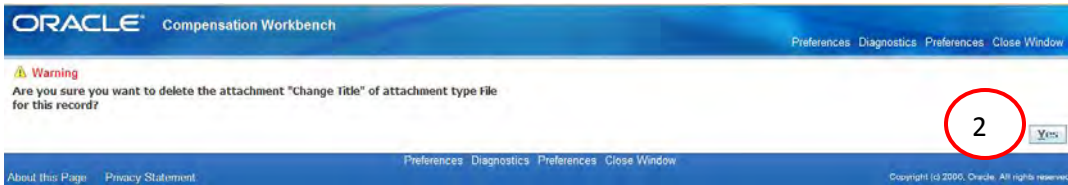
7) Click on the **Return to Notes about (employee name)** link.

Deleting an Attachment

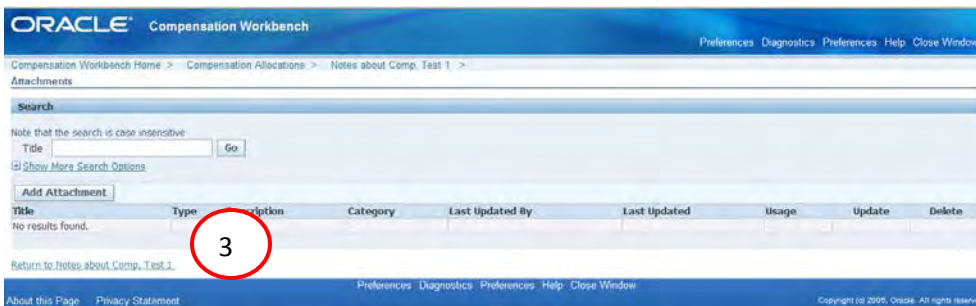


- 1) Click on the **Delete**  icon.

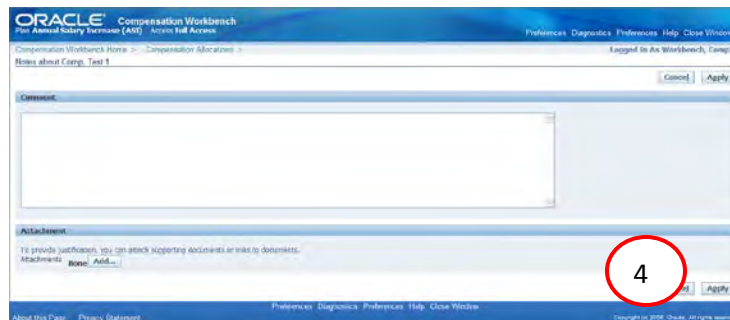
A *Warning* message will appear



- 2) Click on the **Yes**  button.



- 3) Click on the **Return to Notes about (employee name)** link

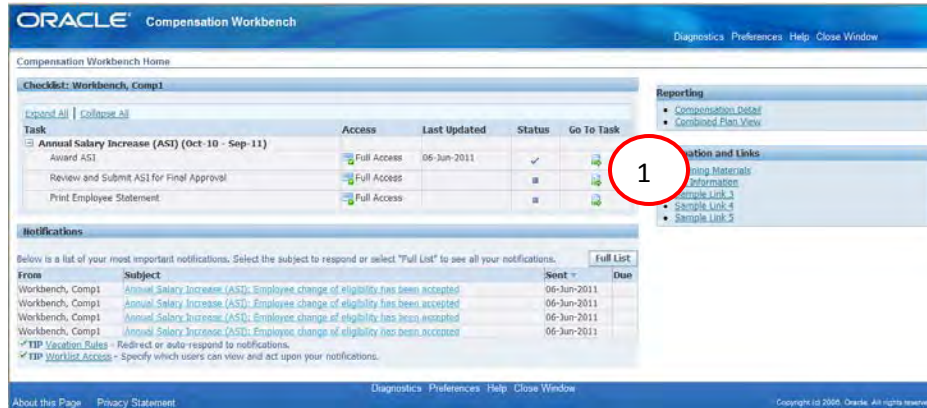


- 4) Click on the **Apply**  button.

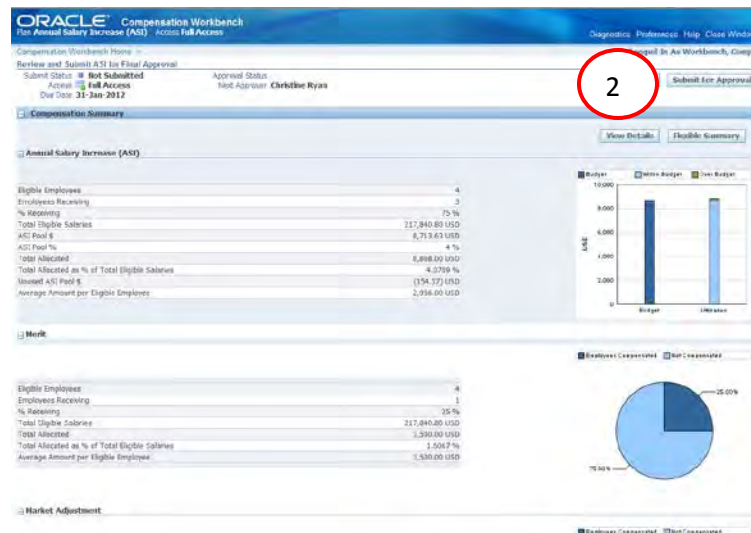
Review and Submit ASI for Final Approval

Once the allocations have been entered and you have selected the Finish button the Status of the Award ASI task will change to Complete and you may now submit the ASI for Final Approval.

Submitting an ASI for Approval



- 1) Click on the **Go to Task**  icon on the *Review and Submit ASI for Final Approval* row.



You may review summary data for your ASI allocations before final submission. Data is displayed for the entire ASI as well as by the individual components. You may also access the individual records by selecting the **View Details** icon or run the Flexible Summary report by selecting the **Flexible Summary** button. If you are not ready to submit your ASI at this time, click on the **Return to Home** button.

- 2) Click on the **Submit For Approval** button.

The *Information* window will open

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says "ORACLE Compensation Workbench" and "Plan Annual Salary Increase (ASI) Access Full Access". On the right, there are links for "Diagnostics", "Preferences", and "Close Window". Below the header, it says "Logged In As Workbench, Comp1". The main content area is titled "Information" and contains the question "Are you sure you want to submit to the next level?". Below this question are two bullet points: "This will prevent you from making further updates." and "This will notify your higher manager that you are finished." At the bottom right of the main content area, there is a "Yes" button, which is circled in red with the number "3" next to it. At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2008, Oracle. All rights reserved."

3) Click on the **Yes** button.

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says "ORACLE Compensation Workbench" and "Plan Annual Salary Increase (ASI) Access Full Access". On the right, there are links for "Diagnostics", "Preferences", and "Close Window". Below the header, it says "Logged In As Workbench, Comp1". The main content area is titled "Comments" and contains the question "Do you wish to notify your approver?". Below this question are two radio buttons: "Yes, notify my approver" (which is selected) and "No, do not notify my approver". Below the "Yes" radio button is a text input field labeled "Include Comments". At the bottom right of the main content area, there is a "Submit" button, which is circled in red with the number "4" next to it. Below the "Submit" button are "Cancel" and "Submit" buttons. At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2008, Oracle. All rights reserved."

4) Click on the **Submit** button.

The *Confirmation* window will open

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says "ORACLE Compensation Workbench" and "Plan Annual Salary Increase (ASI) Access Full Access". On the right, there are links for "Diagnostics", "Preferences", and "Close Window". Below the header, it says "Logged In As Workbench, Comp1". The main content area is titled "Confirmation" and contains the message "Your updates have been submitted for Approval." Below this message is a paragraph: "You may return to your review page at any time to monitor the approvals progress. If you have submitted in error, or wish to make further changes, return to this process and perform a 'Recall Submission'. Once your manager has approved your work, you may no longer recall." At the bottom right of the main content area, there is an "OK" button, which is circled in red with the number "5" next to it. At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2008, Oracle. All rights reserved."

5) Click on the **OK** button.

Recalling a Submitted ASI

If the next level manager, if there is one, or if HR has not initiated their activities you may recall your ASI.

The screenshot shows the Oracle Compensation Workbench interface. At the top, it says "ORACLE Compensation Workbench Plan Annual Salary Increase (ASI) Access Read Only". Below this, there are navigation links for "Diagnostics", "Preferences", "Help", and "Close Window". The user is logged in as "Workbench, Comp1". The main heading is "Review and Submit ASI for Final Approval". Underneath, it shows "Submit Status: Submitted (07-JUN-2011)", "Access: Read Only", and "Due Date: 31 Jan 2012". The "Approval Status" is "Next Approver: Christine Ryan". A red circle with the number "1" highlights the "Recall Submission" button. Below this are sections for "Compensation Summary", "Annual Salary Increase (ASI)", and "Merit", each with a table of data and a corresponding chart.

1) Click on the **Recall Submission** button.

The screenshot shows the "Recall Submission" dialog box. It asks, "Do you wish to recall your submitted worksheet?". Below the question, it provides a warning: "Because your higher manager has not yet taken an approval action, you can still cancel your submission, and continue to make updates. Your manager will be notified about this recall. You are required to submit for approval once again after making desired changes." There is a "Yes" button circled in red with the number "2". Below the dialog is a "Notification Comments" section with a text area for "Enter reason for recalling submission." and "No" and "Yes" buttons.

2) Click on the **Yes** button.

The screenshot shows a confirmation message: "Confirmation Your worksheet has been recalled, and you now have full access to the plan. After making desired changes, you should submit for approval again." A red circle with the number "3" highlights the "Return to Home" button.

3) Click on the **Return to Home** button.

Printing Employee Statements

Once HR has completed the validation process the Print Employee Statement will be made available within the Task section of the Compensation Workbench Home page. HR recommends that you print all of your employee statements at the same time.

ORACLE Compensation Workbench

Diagnostics Home Logout Preferences Help

Compensation Workbench Home

Checklist: Workbench, Comp1

Expand All Collapse All

Task	Access	Last Updated	Status	Go To Task
Annual Salary Increase (ASI) (Oct-10 - Sep-11)				
Award ASI	Full Access	06-Jun-2011	✓	
Review and Submit ASI for Final Approval	Full Access	07-Jun-2011	0	
Print Employee Statement	Full Access			

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications.

From	Subject	Sent	Due
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	

Full List

TIP Vacation Rules - Redirect or auto-respond to notifications.

TIP Worklist Access - Specify which users can view and act upon your notifications.

Diagnostics Home Logout Preferences Help

About this Page Privacy Statement

Copyright (c) 2008, Oracle. All rights reserved.

1) Click on the **Go to Task** icon on *Print Employee Statement* row.

ORACLE Compensation Workbench

Plan Annual Salary Increase (ASI) Access Full Access

Diagnostics Home Logout Preferences Help

Compensation Workbench Home >

Logged In As Workbench, Comp1

Employee Selection

Select the employees that you wish to generate employee statements. If status is not "Processed", then final approval has not yet occurred. WARNING: If you choose to print on a shared printer, it is your responsibility to ensure confidentiality.

* View Direct Employees

Select All	Select Emp.	Employee Number	Business Group	Status
<input checked="" type="checkbox"/>	Comp, Test 1	1135277	Caltech	Unprocessed
<input checked="" type="checkbox"/>	Comp, Test 17	1150773	Caltech	Unprocessed
<input checked="" type="checkbox"/>	Comp, Test 18	1152203	Caltech	Unprocessed
<input checked="" type="checkbox"/>	Comp, Test 2	1135303	Caltech	Unprocessed

Generate Statements Finish

Generate Statements Finish

Diagnostics Home Logout Preferences Help

About this Page Privacy Statement

Copyright (c) 2008, Oracle. All rights reserved.

2) Click on the **Select All** link.

3) Click on the **Generate Statements** button.

ORACLE Compensation Workbench

Diagnostics Preferences Help Close Window

Compensation Workbench Home > Employee Selection >

Document Information

Group Name Caltech_CWB_Letters Short Name Caltech_CWB_Letters

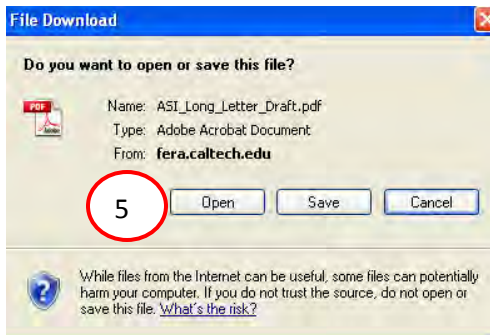
Document Name	Short Name
Draft ASI Short Letter v29	Draft_ASI_Short_Letter_v29
ASI Statement Draft v30	ASI_Statement_Draft_v30
ASI Long Letter Draft	ASI_Long_Letter_Draft

[Return](#)

Diagnostics Preferences Help Close Window

About this Page Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

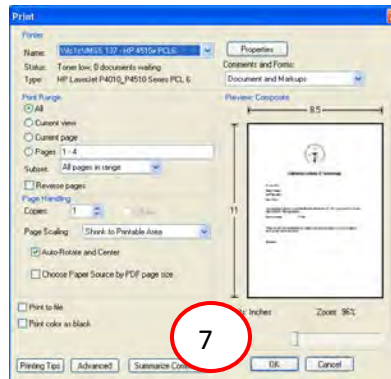
- 4) Click on your preferred Document. For this example, we will click on the **ASI Long Letter Draft**.



- 5) Click on the **Open** button.



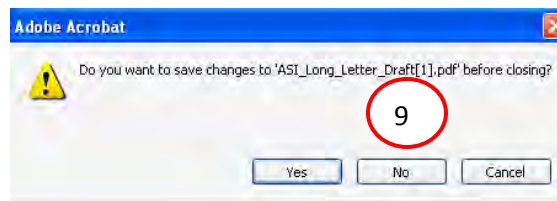
- 6) Click on the **Printer**  icon.



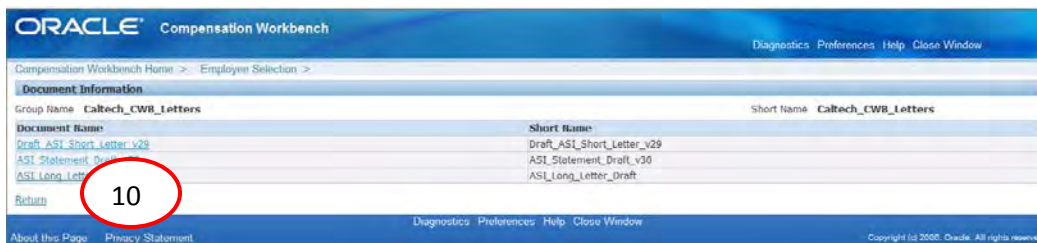
7) Click on the **OK** button.



8) Click on the **x** in the upper right hand corner of the window to close the forms.



9) Click on the **No** button.



10) Click on the **Return** link.

Compensation Detail Report

The Compensation Detail Report allows you to view employee details for the entire ASI and by the individual ASI Components as well as Manager Hierarchy information.

ORACLE Compensation Workbench

Diagnosics Preferences Help Close Window

Compensation Workbench Home

Checklist: Workbench, Comp1

Expand All Collapse All

Task	Access	Last Updated	Status	Go To Task
Annual Salary Increase (ASI) (Oct-10 - Sep-11)				
Award ASI	Full Access	06-Jun-2011	✓	Go
Review and Submit ASI for Final Approval	Full Access	07-Jun-2011	?	Go
Print Employee Statement	Full Access	07-Jun-2011	?	Go

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications.

From	Subject	Sent	Due
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	
Workbench, Comp1	Annual Salary Increase (ASI): Employee change of eligibility has been accepted	06-Jun-2011	

Full List

Diagnosics Preferences Help Close Window

About this Page Privacy Statement

Copyright (c) 2006, Oracle. All rights reserved.

1) Click on the **Compensation Detail** link.

ORACLE Compensation Workbench

Diagnosics Preferences Help Close Window

Logged In As Workbench, Comp1

Compensation Detail Report

Cancel

Report Filters

Compensation Plan: Annual Salary Increase (ASI)

Period: 01-Oct-2010 - 30-Sep-2011, 01-Oct-2011

Employees Under Manager: [Search]

Levels Down: All Employees

Number of Rows Displayed: 20

Go

Organization Contains: [Text Box]

Grade Contains: [Text Box]

Employee Name Contains: [Text Box]

Employee Number: [Text Box]

Download to Spreadsheet

Employee Name	Employee Number	Organization	Job	Manager	Hire Date	Status	Date Processed
Comp, Test 1	1135277	Staff Benefits	Staff Support.U..1060.GENAD...	Workbench, Comp1	05-Mar-1990	Pending	
Comp, Test 17	1150773	Staff Benefits	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	02-Jun-1997	Pending	
Comp, Test 18	1152203	Staff Benefits	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	11-Jun-1987	Pending	
Comp, Test 2	1135303	Staff Benefits	Staff Support.U..1060.GENAD...	Workbench, Comp1	19-Nov-1985	Pending	

Cancel

Diagnosics Preferences Help Close Window

About this Page Privacy Statement

Copyright (c) 2006, Oracle. All rights reserved.

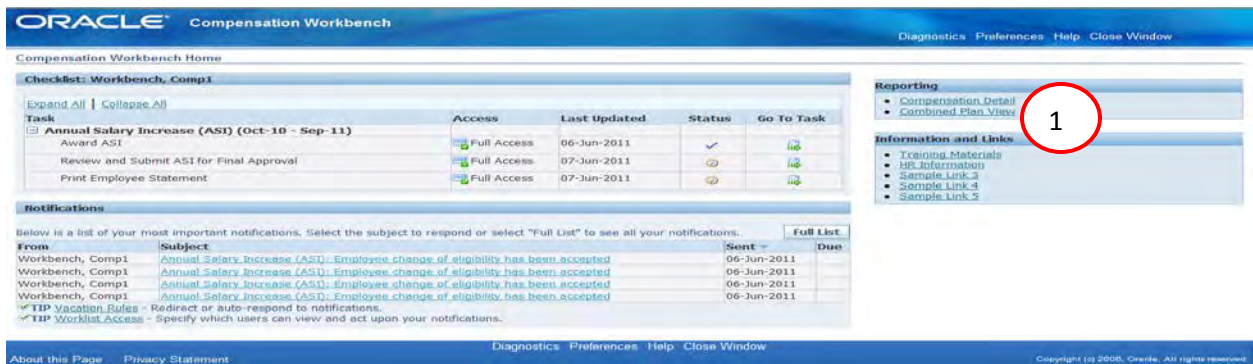
2) Click on the **Go** button.

There are five tabs available on this report; Employee Details, ASI, Merit, Market Adjustment, Bonus In-Lieu, Performance Bonus and Manager Hierarchy. The Employee Details displays field such as the Employee Name, Employee Number, Job, etc. The ASI tab displays all of the employees and lists their total ASI amounts and percentages. The Merit, Market, Bonus In-Lieu and Performance Bonus display the amounts and percentages for each ASI component respectively. The Manager Hierarchy tab displays the manager hierarchy for each employee.

Combined Plan View

The Combined Plan View Report allows you to compare results of the entire ASI and the various components in one report. The plans (entire ASI and the components) are displayed side by side for comparison.

Running the Report



The screenshot shows the Oracle Compensation Workbench interface. The 'Reporting' section on the right side of the page has a red circle around the 'Combined Plan View' link, with the number '1' inside the circle. The 'Checklist: Workbench, Comp1' section on the left shows a table of tasks related to the Annual Salary Increase (ASI).

Task	Access	Last Updated	Status	Go To Task
Annual Salary Increase (ASI) (Oct-10 - Sep-11)	Full Access	06-Jun-2011	✓	Go
Award ASI	Full Access	07-Jun-2011	⊖	Go
Review and Submit ASI for Final Approval	Full Access	07-Jun-2011	⊖	Go
Print Employee Statement	Full Access	07-Jun-2011	⊖	Go

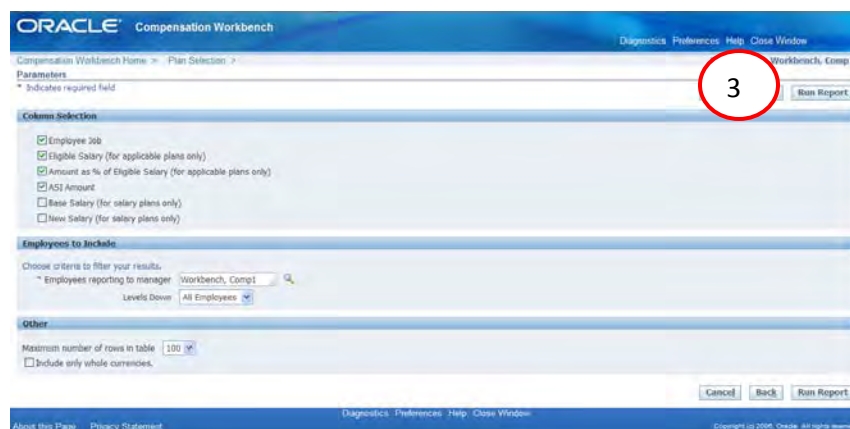
1) Click on the **Combined Plan View** link.



The screenshot shows the 'Plan Selection' screen in Oracle Compensation Workbench. A red circle highlights the 'Next' button in the top right corner, with the number '2' inside the circle. The screen displays a table of plans to be selected for reporting.

Select Plan	Period Ending
<input checked="" type="checkbox"/> Annual Salary Increase (ASI)	30-Sep-2011
<input checked="" type="checkbox"/> Annual Salary Increase (ASI) - Merit	30-Sep-2011
<input checked="" type="checkbox"/> Annual Salary Increase (ASI) - Market Adjustment	30-Sep-2011
<input checked="" type="checkbox"/> Annual Salary Increase (ASI) - Bonus In-Lieu	30-Sep-2011
<input checked="" type="checkbox"/> Annual Salary Increase (ASI) - Performance Bonus	30-Sep-2011

2) Click on the **Next** button.



The screenshot shows the 'Parameters' screen in Oracle Compensation Workbench. A red circle highlights the 'Run Report' button in the top right corner, with the number '3' inside the circle. The screen displays various options for column selection and employee inclusion.

Column Selection

- Employee Job
- Eligible Salary (for applicable plans only)
- Amount as % of Eligible Salary (for applicable plans only)
- ASI Amount
- Base Salary (for salary plans only)
- Leave Salary (for salary plans only)

Employees to Include

Choose criteria to filter your results.

Employees reporting to manager: Workbench, Comp1

Levels Down: All Employees

Other

Maximum number of rows in table: 100

Include only whole currencies.

3) Click on the **Run Report** button.

ORACLE Compensation Workbench

Diagnosics Preferences Help Close Window

Compensation Workbench Home > Plan Selection > Parameters > Logged In As Workbench, Comp1

Country: All Countries
Manager: Workbench, Comp1 - All Employees
Display Currency:
Hierarchy As Of: 01-Oct-2011

Summary

	Merit (01-Oct-2011)	Market Adjustment (01-Oct-2011)	Annual Salary Increase (ASI)		Performance Bonus (01-Oct-2011)	Total (01-Oct-2011)
			Bonus In-Lieu (01-Oct-2011)			
Eligible Employees	4		4		4	4
Employees Receiving	1		1		1	3
% Receiving	25%		25%		25%	75%
Total Eligible Salaries	217840.8 null		217840.8 null		217840.8 null	217840.8 null
Total Allocated	3500		2000		1368	8868
Average Amount Allocated	875		500		342	2156
Average % of Eligible Salaries	1.6%		0.9%		0.6%	4.1%

Details

Employee	Job	Merit (01-Oct-2011)		Market Adjustment (01-Oct-2011)		Annual Salary Increase (ASI)		Performance Bonus (01-Oct-2011)		Total (01-Oct-2011)		
		Eligible Salary/Amount	% of Salary	Eligible Salary/Amount	% of Salary	Eligible Salary/Amount	% of Salary	Eligible Salary/Amount	% of Salary	Eligible Salary/Amount	% of Salary/Employee	
Test 1	Staff	51,916.80	3,500.00	6.7	51,916.80	0.00	0	51,916.80	0.00	0	51,916.80	6.7
Comp	Support U...1068.GENAD...											Test 1
Test 17	Administrator	68,400.00	0.00	0	68,400.00	2,000.00	2.9	68,400.00	1,268.00	2	68,400.00	4.9
Comp	IC.U.1067.GENAD...											Comp
Test 18	Administrator	57,900.00			57,900.00		0	57,900.00	2,000.00	3.5	57,900.00	3.5
Comp	IC.U.1067.GENAD...											Comp
Test 2	Staff	39,624.00	0.00	0	39,624.00	0.00	0	39,624.00	0.00	0	39,624.00	0
Comp	Support U...10...											Test 2

Return to Parameters: **4**

About this Page Privacy Statement

Diagnosics Preferences Help Close Window

Copyright (c) 2008 Oracle. All rights reserved.

NOTE: Please disregard the word null displayed in the Total Eligible Salaries columns. This documentation was done in the testing environment and you will not see this when we go live.

Changing the Parameters of the Report

- Click on the **Return to Parameters** link.

ORACLE Compensation Workbench

Diagnosics Preferences Help Close Window

Compensation Workbench Home > Plan Selection > Parameters > Logged In As Workbench, Comp1

Parameters

* Indicates required field

Cancel Back Run Report

Column Selection

- Employee Job
- Eligible Salary (for applicable plans only)
- Amount as % of Eligible Salary (for applicable plans only)
- ASI Amount
- Base Salary (for salary plans only)
- New Salary (for salary plans only)

Employees to Include

Choose criteria to filter your results.

* Employees reporting to manager: Workbench, Comp1

Levels Down: All Employees

Other

Maximum number of rows in table: 100

Include only whole currencies.

Cancel Back Run Report

About this Page Privacy Statement

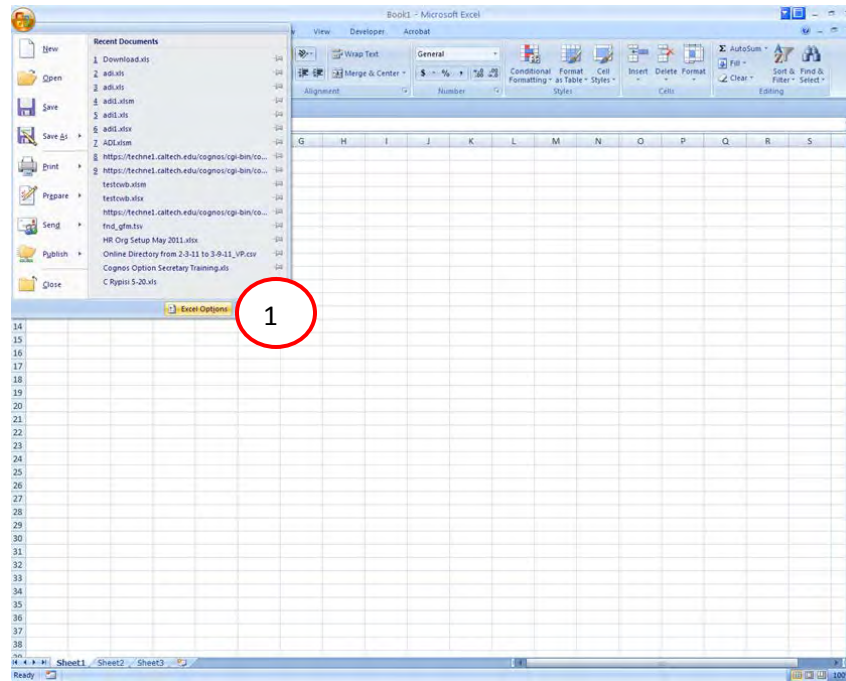
Diagnosics Preferences Help Close Window

Copyright (c) 2008 Oracle. All rights reserved.

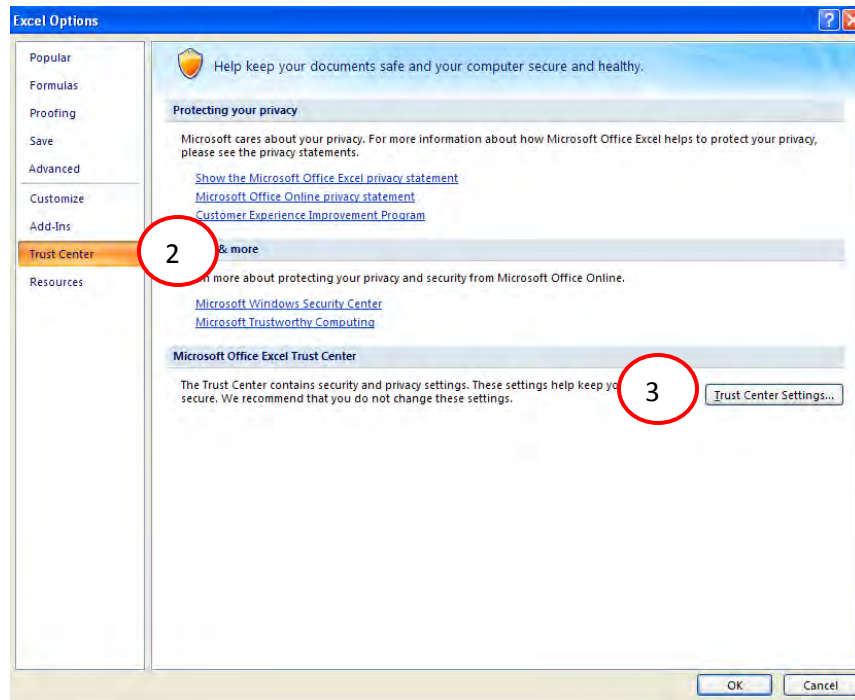
In the Parameters window you have the ability to select which columns you would like to appear in your report.

The **Cancel** button returns you to the **Compensation Workbench Home** page and the **Back** button takes you back to the Plan Selection page where you may select the plans (entire ASI and individual components) you would like to compare.

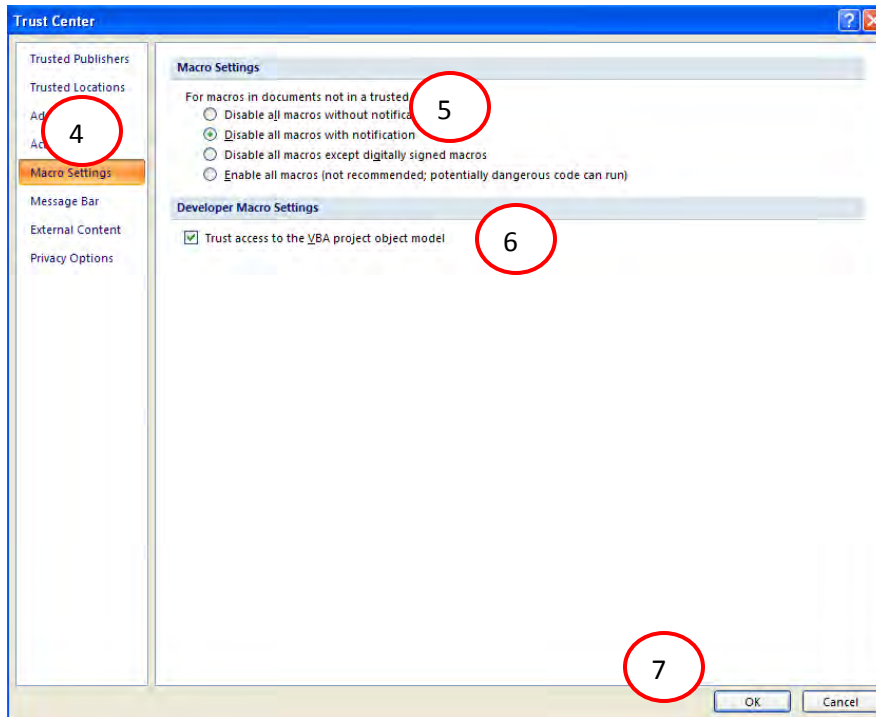
Excel Settings Required for Download to Spreadsheet



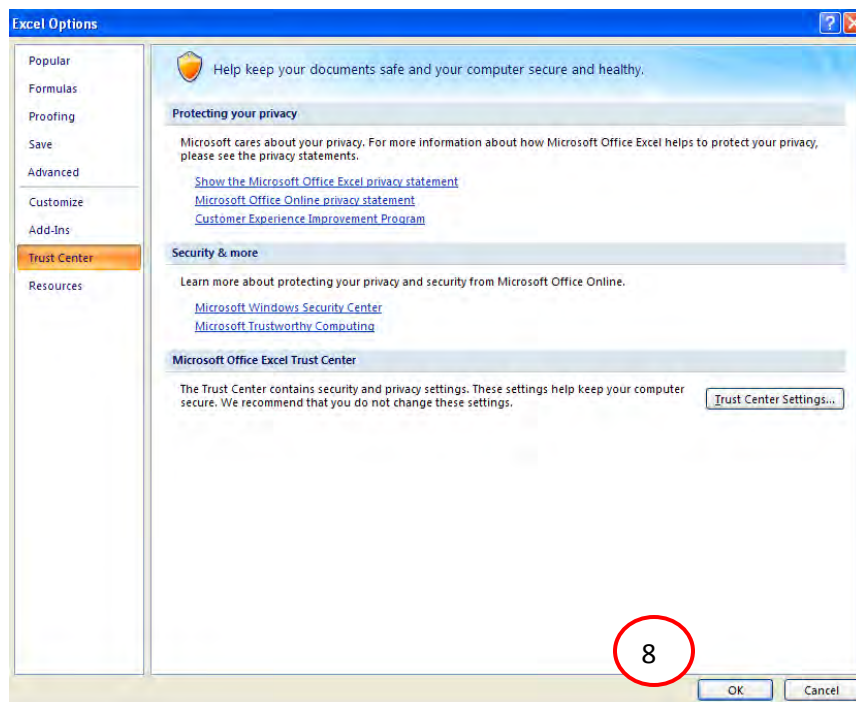
1) Select **Excel Options** from the *Office Button* drop down menu.



- 2) Click on **Trust Center**.
- 3) Click on **Trust Center Settings**.

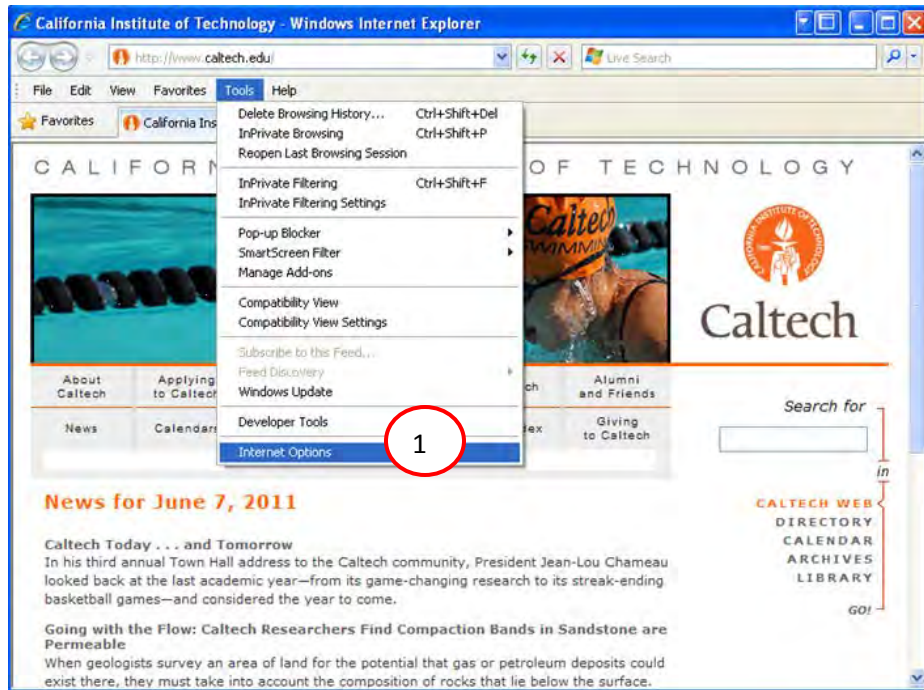


- 4) Click on **Macro Settings**.
- 5) Click on the **Disable all macros with notification** radio button.
- 6) Click on the **Trust access to the VBA project object mode** box.
- 7) Click on the **OK** button.

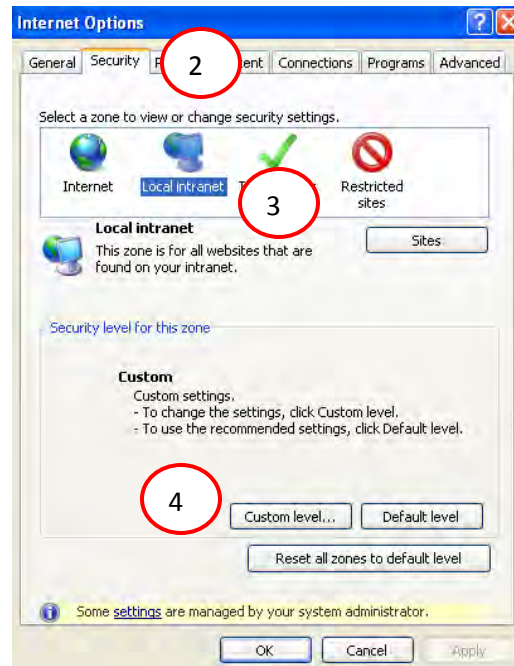


- 8) Click on the **OK** button.

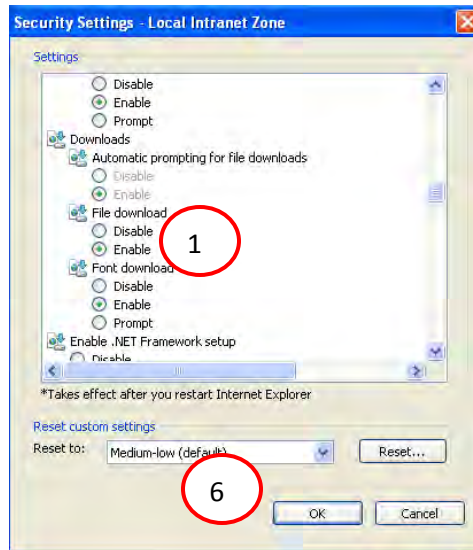
Internet Explorer Settings Required for Download to Spreadsheet



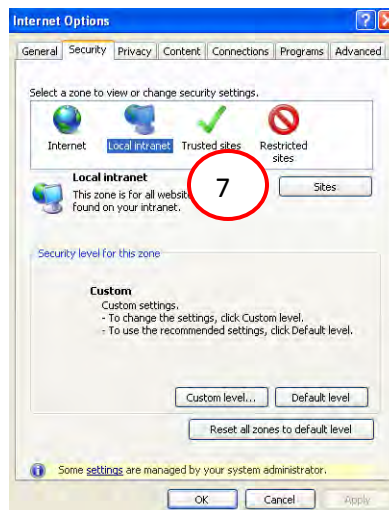
1) Select **Internet Options** from the *Tools* menu.



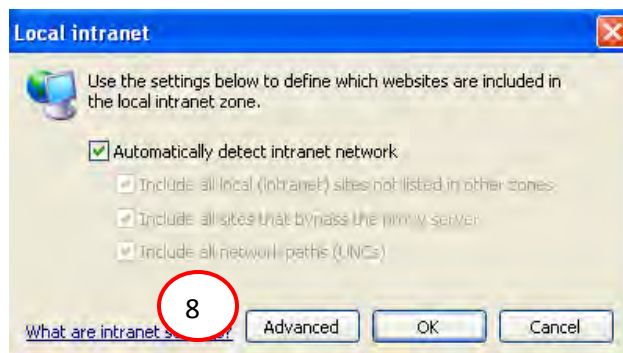
- 2) Click on the **Security Tab**.
- 3) Click on the **Local Intranet** icon.
- 4) Click on the **Custom level** button.



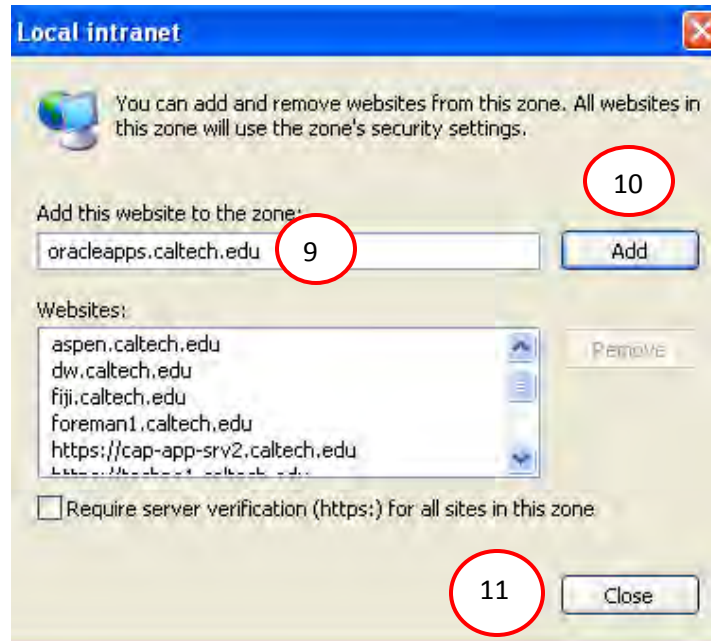
- 5) Scroll down to the *Downloads* area and click on the *File Download* **Enable** radio button.
- 6) Click on the **OK** button.



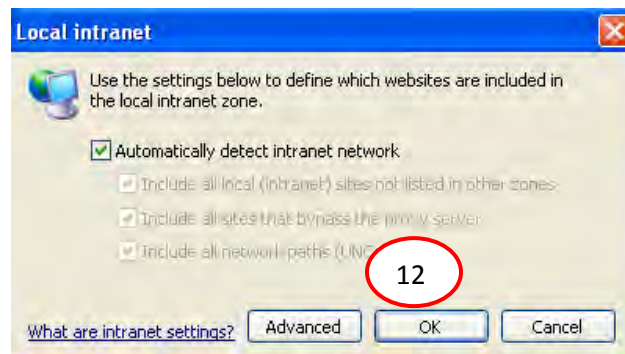
- 7) With the *Local Intranet* icon still highlighted, click on the **Sites** button.



- 8) Click on the **Advanced** button.



- 9) Within the *Add this website to the zone:* field type in **oracleapps.caltech.edu**
- 10) Click on the **Add** button.
- 11) Click on the **Close** button.



- 12) Click on the **OK** button.



13) Click on the **OK** button.