

# Compensation Workbench

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## Logging into Compensation Workbench

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

access caltech  
ACCESS.CALTECH.EDU

**Welcome to 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](mailto:help@caltech.edu).

IMPORTANT: Your browser must accept cookies to use access.caltech  
[Sign In](#)

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- 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
<b>Annual Salary Increase (ASI) (Oct-10 - Sep-11)</b>				
Award ASI	Full Access			
Review and Submit ASI for Final Approval	Full Access			
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. [Full List](#)

From	Subject	Sent	Due
There are no notifications in this view.			
✓ <a href="#">TIP Vacation Rules</a> - Redirect or auto-respond to notifications.			
✓ <a href="#">TIP Worklist Access</a> - 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 3](#)
- [Sample Link 4](#)
- [Sample Link 5](#)

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## 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.

**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			
Review and Submit ASI for Final Approval	Full Access			
Print Employee Statement	Full Access			

Reporting

- Compensation Detail
- Combined Plan View

Information and Links

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

Notifications

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

Full List

From	Subject	Sent	Due
There are no notifications in this view.			
TIP Vacation Rules - Redirect or auto-respond to notifications.			
TIP Worklist Access - Specify which users can view and act upon your notifications.			

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

The *Compensation Allocations* window will open.

**ORACLE Compensation Workbench**

Plan Annual Salary Increase (ASI) Access Full Access

Diagnostics Home Logout Preferences Help

Compensation Workbench Home >

Workbench, Comp1 : Compensation Allocations

Cancel Recalculate Save Finish

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	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 %

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 Hourly Pay	New 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 0.00 ↓	0	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	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	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	39,624.00	19.05	Workbench, 40	Comp1	0.00	0	0.00	0

Cancel Recalculate Save Finish

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## Viewing Job History

**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	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 %

**Options**

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

**Employee Allocations**

Find Name  Go

Organization	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	2	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	0.00	0.00	51,916.80	24.96	Workbench, Comp1	40	0.00	0	0.00	0
Staff Benefits	1150773	Comp, Test	17	U.42	Administrator-IC.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	U.42	Administrator-IC.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	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

Cancel Recalculate Save Finish

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2) Click on the **Job History**  icon.

The *Job History* window will open.

**Performance and Promotion History Popup**

**Job History**

Date	Job	Grade	People Group	Change Reason
21-MAR-2007	Staff Support.U..1060.GENAD...	U.39	Staff.Yes.No...R2..Assistant	Work Location Change
04-MAR-2002	Materiel Handling.U..1055.FACTR...	U.39	Staff.Yes.No...R2..Senior	Promotion
06-NOV-2000	Sr Division/Depart Assistant.O.06.38....	O.06	Staff.Yes.No...R2..	Promotion

This window displays information such as Job, Grade, People Group and Change Reason.

3) Click the **x** in the upper right hand corner to close the window.













## Viewing Employee Details

[Diagnostics](#) [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 Salary	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, 40 Comp1		0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
2.88	Workbench, 40 Comp1		0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
7.84	Workbench, 40 Comp1		0.00	0	0.00	0	0.00	0	0.00	0					4	2	6
9.05	Workbench, 40 Comp1		0.00	0	0.00	0	0.00	0	0.00	0		Net			4	2	6

[Cancel](#) [Recalculate](#) [Save](#) [Finish](#)

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

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

[Preferences](#) [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#)  
 Logged In As Workbench, Comp1

Compensation Workbench Home > Compensation Allocations >  
 Employee Details: Comp, Test 1

[Return](#)

**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	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

[Return](#)

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

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

## Viewing Compensation History

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 Logged In As Workbench, Comp1

[Cancel](#) [Recalculate](#) [Save](#) [Finish](#)

**Options**

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

New 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	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			4	2	6

[Cancel](#) [Recalculate](#) [Save](#) [Finish](#)

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

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 Plan Annual Salary Increase (ASI) Access Full Access

[Preferences](#) [Diagnostics](#) [Preferences](#) [Help](#) [Close Window](#)

Compensation Workbench Home > Compensation Allocations >

History: Comp, Test 1

[Return](#)

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](#)

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

- 7) 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 Organization, Employee Number, Employee Name, 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 Adjustment as % of Eligible Salary. The 'Merit' column in the 'Employee Allocations' table is highlighted with a red circle, showing a value of 3,500.00 for the first employee.

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 %	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 \$	3,500.00 USD	3,500.00 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 %				

Organization	Employee Number	Employee Name	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 Adjustment 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 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 Employee Salary	Details	Gross or Net
50.GENAD...	51,916.80	24.96	3,500.00 ↑	6.74	55,416.80	26.64	Workbench,	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,	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,	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,	40	0.00	0	0.00	0	0.00	0	0.00	0		

Cancel R 7 Save Finish

- 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.

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Plan Annual Salary Increase (ASI) Access Full Access

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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	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 %

**Options**

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

**Employee Allocations**

Find Name  Go

Organization	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 as % of Eligible Salary	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, Comp1	40	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	0.00	68,400.00	32.88	Workbench, Comp1	40	0.00	0.00
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, Comp1	40	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	0.00	39,624.00	19.05	Workbench, Comp1	40	0.00	0.00

Cancel Recalculate Save Finish

Diagnostics Home Logout Preferences Help

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

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

Diagnostics Home Logout Preferences Help

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

Component Selection

Please select the Component for which you wish to Automatically Allocate.

**Select Component Name**

- ☐ Merit
- ☐ Market Adjustment
- ☒ Bonus In-Lieu
- ☐ Performance Bonus

Cancel Next

Diagnostics Home Logout Preferences Help

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

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

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Plan Annual Salary Increase (ASI) Access Full Access

Diagnostics Home Logout Preferences Help

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

**Person Selection**

Cancel Back Next

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	Staff Support.U..1060.GENAD...	51,916.80 Comp1 Workbench
<input type="checkbox"/>	Test 18 Comp	Administrator-JC.U..1067.GENAD...	68,400.00 Comp1 Workbench
<input checked="" type="checkbox"/>	Test 2 Comp	Administrator-JC.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 5 Next

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4) Uncheck the box for employee on line number two.

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

**ORACLE® Compensation Workbench**  
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Diagnostics Home Logout Preferences Help

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

**Distribution Method**

Cancel Back Next

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

☒ Distribute Equally using Allocation Calculator ⓘ

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

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

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Plan Annual Salary Increase (ASI) Access Full Access

Diagnostics Home Logout Preferences Help

Logged In As Workbench, Comp1

Component Selection Employee Selection Distribution Method Calculation Details Review

**Calculation Details - Distribute Equally using Allocation Calculator**

Cancel Back Next

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	
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 %

Recalculate

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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



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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

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

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

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Diagnosics Home Logout Preferences Help

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 %

**Options**

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

**Employee Allocations**

Find Name  Go

Organization	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-Regular	U.39	Staff Support.U..1060.GENAD...	51,916.80	24.96	5,057.50 ↑	9.74	55,416.80	26.64	Workbench, 40	Comp1	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, 40	Comp1	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, 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	1,188.72 ↓	3	39,624.00	19.05	Workbench, 40	Comp1	0.00	0	0.00	0

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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 displays the Oracle Compensation Workbench interface. The top navigation bar includes links for Diagnostics, Home, Logout, Preferences, and Help. The main content area is titled 'Workbench, Comp1 : Compensation Allocations'. On the right side, there is a sidebar with an 'Options' menu. The 'Options' menu contains several links: 'Use Allocation Wizard', 'Download To Spreadsheet', 'Change Employee Eligibility', 'Flexible Summary', and 'Audit History'. The 'Change Employee Eligibility' link is circled in red, and a red circle with the number '1' is placed over it. Below the 'Options' menu, there is a table titled 'Compensation Summary - Team' showing various financial metrics. At the bottom of the page, there is a footer with 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

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	5,057.50	9.74	55,416.80	26.64	Workbench, 40	Comp1	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, 40	Comp1	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, 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	1,188.72	3	39,624.00	19.05	Workbench, 40	Comp1	0.00	0	0.00	0

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. Cancel Continue

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

Continue

Diagnosics Home Logout Preferences Help

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

3) Click on the Continue button.

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Plan Annual Salary Increase (ASI) Access Full Access

Preferences Diagnosics Home Logout Preferences Help

Logged In As Workbench, Comp1

**Review**

Cancel Back Submit

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. 4

Cancel 5 Submit

Preferences Diagnosics Home Logout Preferences Help

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4) Enter the reason for making the person ineligible in the **Comments for Approvers** field.

5) Click on the Submit icon.

**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.









Employment 6 Return

Preferences Diagnosics Home Logout Preferences

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6) Click on the Return button.

The *Compensation Allocations* window will open.

Employee Allocations																	
Find Name		<input type="text"/>															
		<input type="button" value="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				
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

**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				
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

Diagnostics Home Logout Preferences Help

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

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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. Cancel Continue

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
	Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible
	Comp, Test 18	US	1152203	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible
	Comp, Test 2	US	1135303	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible

Continue

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

3) Click on the Continue button.

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Preferences Diagnosics Home Logout Preferences Help

Logged In As Workbench, Comp1

**Review**

Cancel Back Submit

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

**Comments For Approvers**

Enter the reason for making this employee eligible for a Merit increase. 4

5 Cancel Back Submit

Preferences Diagnosics Home Logout Preferences Help

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4) Enter the reason for making the person eligible in the **Comments for Approvers** field.

5) Click on the Submit 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.

6 Employ Return

Preferences Diagnosics Home Logout Preferences

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6) Click on the Return 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

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	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**

Find Name  Go

Organization	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-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				
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

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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.

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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

Cancel Recalculate Save Finish

**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**

Find Name  Go

Organization	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	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

Cancel Recalculate Save Finish

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



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

Diagnostics 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. [Cancel] [Continue]

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

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...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 18	US	1152203	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
Comp, Test 19	US	1170052	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 2	US	1135303	Staff Support.U..1060.GENAD...	Workbench, Comp1	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible

[Cancel] [Continue]

Diagnostics Home Logout Preferences Help

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**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 **Go** button.

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

Diagnostics 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. [Cancel] [Continue]

Find Name [ ] Go View All Countries Direct Employees 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	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 17	US	1150773	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible
Comp, Test 19	US	1170052	Administrator-IC.U..1067.GENAD...	Workbench, Comp1	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible	Ineligible

[Cancel] [Continue]

Diagnostics Home Logout Preferences Help

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- 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 displays the Oracle Compensation Workbench interface. At the top, the header reads "ORACLE Compensation Workbench" with subtext "Plan Annual Salary Increase (ASI) Access Full Access". Navigation links include "Home", "Logout", "Preferences", and "Help". Below the header, the page title is "Workbench, Comp1 : Compensation Allocations".

The main content area is divided into two sections. The top section, "Compensation Summary - Team", contains a table with columns: Total, Merit, Market Adjustment, Bonus In-Lieu, and Performance Bonus. The bottom section, "Employee Allocations", contains a table with columns: Organization, Employee #, Employee Name, 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 E.

On the right side of the interface, there is an "Options" panel. It contains a list of links: "Use Allocation Wizard", "Download To Spreadsheet", "Change Employee Eligibility", "Flexible Summary", and "Audit History". The "Download To Spreadsheet" link is circled in red, with a red circle containing the number "1" next to it.

At the bottom of the interface, there is a footer with "Privacy Statement" and "Copyright (c) 2006, Oracle. All rights reserved."

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



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

Diagnostics Home Logout Preferences Help

Compensation Workbench Home > Compensation Allocations > Download to Spreadsheet

Logged In As Workbench, Comp1

Return Download Default Definition Customize

**To Download** This will open an Excel spreadsheet. You may download either a default definition, or you may customize the columns that you wish to download. The spreadsheet may open in the background.

PLEASE NOTE: Before downloading the first time, you should ensure that your browser and Excel are configured. Follow these steps:

- Step 1: From the Internet Explorer Menu, choose Tools -> Internet Options -> Security tab. Select 'Local intranet' and click the Custom Level button. Set 'File Download' to 'Enable'.
- Step 2: If you are using Excel 2000/2003:
  1. Open Excel. From the Excel Menu, choose Tools -> Macro -> Security. Select 'Medium' as the Security Level.
  2. Select the Trusted Publishers tab (also called Trusted Sources). Ensure that 'Trust access to Visual Basic Project' is checked, then OK. Close Excel.
- Step 2: If you are using Excel 2007:
  1. Select Excel Options > Trust Center > Trust Center Settings > Disable All Macros with Notification.
  2. Also check "Trust Access to VBA Project Model".

Step 1 only applies if you are using Internet Explorer.

**To Upload** After downloading, with the spreadsheet menu, select Oracle > Import. Upload errors will be flagged within the spreadsheet. Once uploaded, the data will immediately be updated in the database. You cannot undo an upload.

Return Download Default Definition Customize

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

To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

**Information**

A file will be downloaded to your desktop.  
When prompted, choose to open the file and to enable macros. If no prompt appears, ensure your browser security settings allow files to be downloaded.

Return

Copyright 2005, Oracle Corporation. All rights reserved.

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

To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

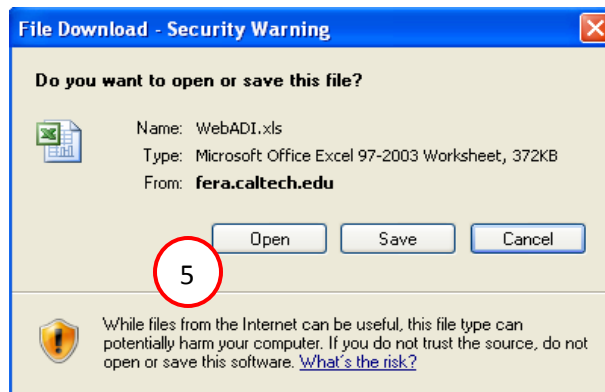
**Information**

A file will be downloaded to your desktop.  
When prompted, choose to open the file and to enable macros. If no prompt appears, ensure your browser security settings allow files to be downloaded.

Return

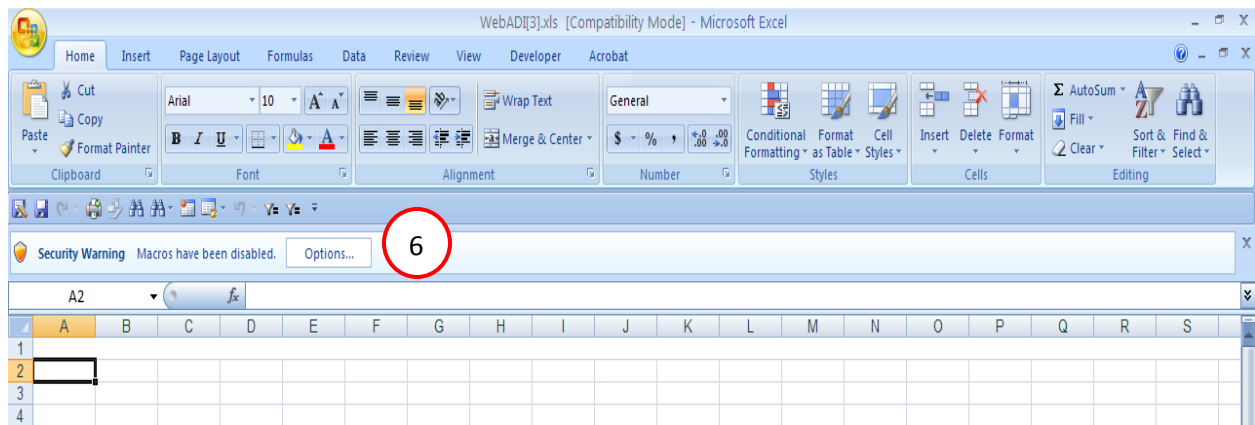
Copyright 2005, Oracle Corporation. All rights reserved.

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

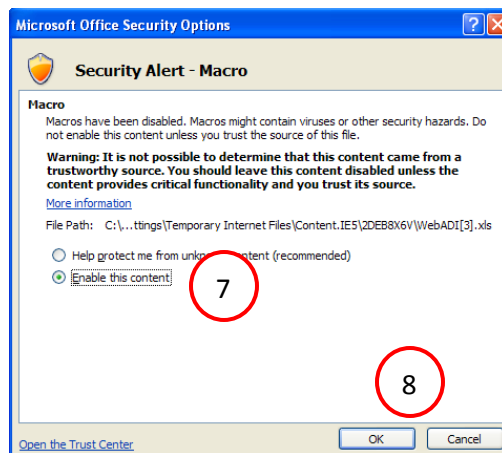


5) Click on **Open**.

An Excel spreadsheet will open.



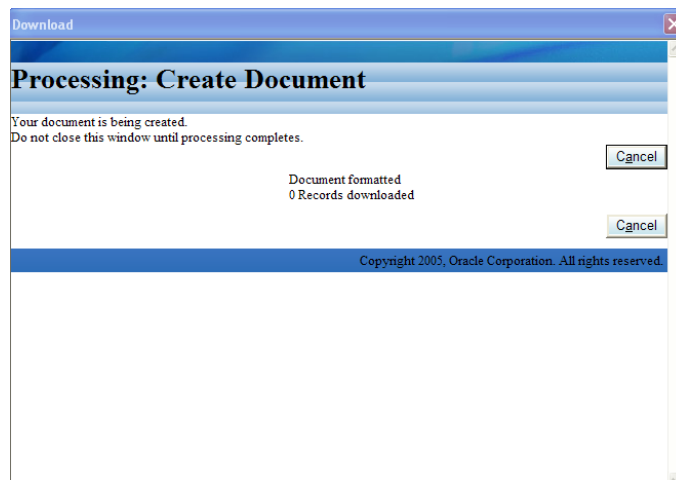
6) Click on **Options...**



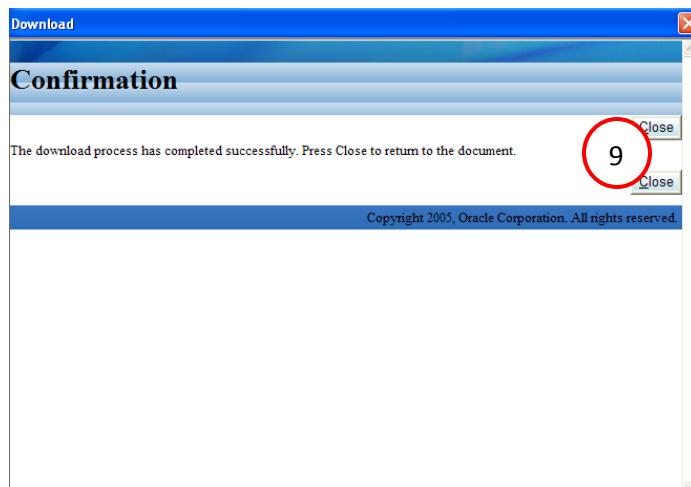
7) Click on the **Enable this content** radio button.

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

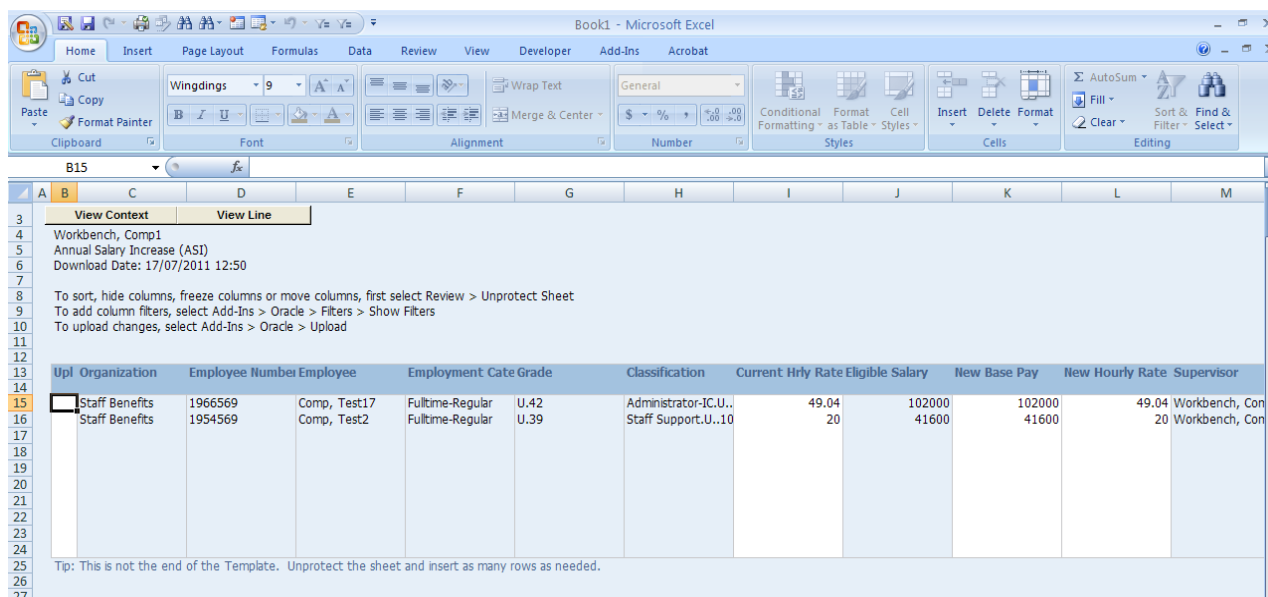
The *Download* window will open



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**.

Book1 - Microsoft Excel

HomeInsertPage LayoutFormulasDataReviewViewDeveloperAdd-InsAcrobat

CWB Formatter  
Oracle

Menu Commands

B15

A	B	C	D	E	F	G	H	I	J	K	L	M
3	View Context		View Line									
4	Workbench, Comp1											
5	Annual Salary Increase (ASI)											
6	Download Date: 17/07/2011 12:57											
7												
8	To sort, hide columns, freeze columns or move columns, first select Review > Unprotect Sheet											
9	To add column filters, select Add-Ins > Oracle > Filters > Show Filters											
10	To upload changes, select Add-Ins > Oracle > Upload											
11												
12												
13												
14												
15	Upl	Organization	Employee Number	Employee	Employment Cate	Grade	Classification	Current Hrly Rate	Eligible Salary	New Base Pay	New Hourly Rate	Supervisor
16	<input type="checkbox"/>	Staff Benefits	1966569	Comp, Test17	Fulltime-Regular	U.42	Administrator-IC.U..	49.04	102000	102000	49.04	Workbench, Con
17		Staff Benefits	1954569	Comp, Test2	Fulltime-Regular	U.39	Staff Support.U..10	20	41600	41600	20	Workbench, Con
18												
19												
20												
21												
22												
23												
24												
25												

Tip: This is not the end of the Template. Unprotect the sheet and insert as many rows as needed.

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

Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer Add-Ins Acrobat

CWB Formatter  
Oracle

Menu Commands

A1

View Context View Line

Workbench, Comp1  
Annual Salary Increase (ASI)  
Download Date: 17/07/2011 12:57

To sort, hide columns, freeze columns or move columns, first select Review > Unprotect Sheet  
To add column filters, select Add-Ins > Oracle > Filters > Show Filters  
To upload changes, select Add-Ins > Oracle > Upload

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

Tip: This is not the end of the Template. Unprotect the sheet

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.

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	2.0%	0
Re	Staff Benefits	1954569	Comp, Test2	Workbench, Comp1	40	0		832	2.0%	0

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

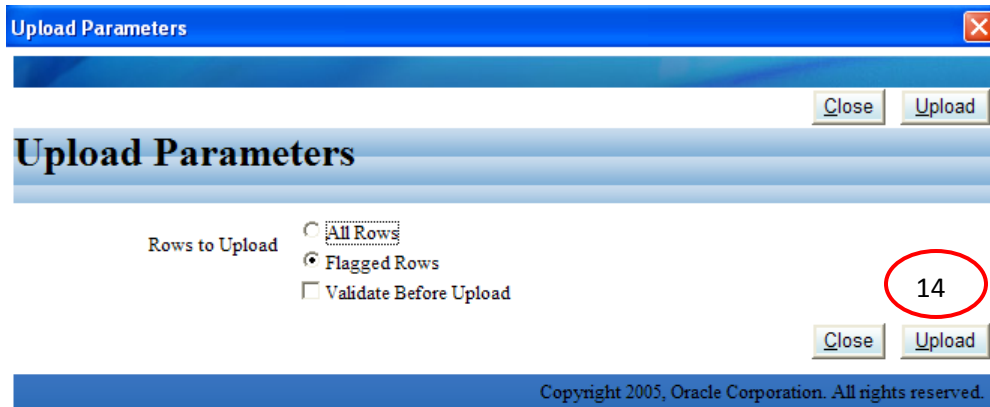
12) Scroll to column R of the spreadsheet and enter **2%** in the *Market %* column.

**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)

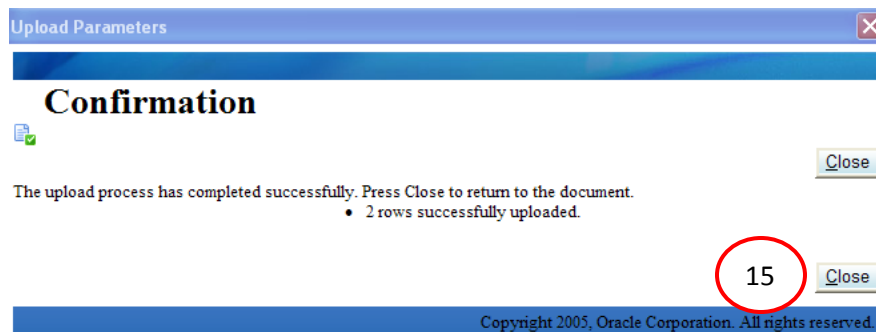
Upl	Organization	Employee Number	Employee	Supervisor	Normal Hours	Merit	Merit %	Market Adjustment	Market %	Bonus in Lieu (BII Performance)
Re	Staff Benefits	1966569	Comp, Test17	Workbench, Comp1	40	2040	2.0%	0	2.0%	0
Re	Staff Benefits	1954569	Comp, Test2	Workbench, Comp1	40	0		832	2.0%	0

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



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

The Confirmation window will appear.

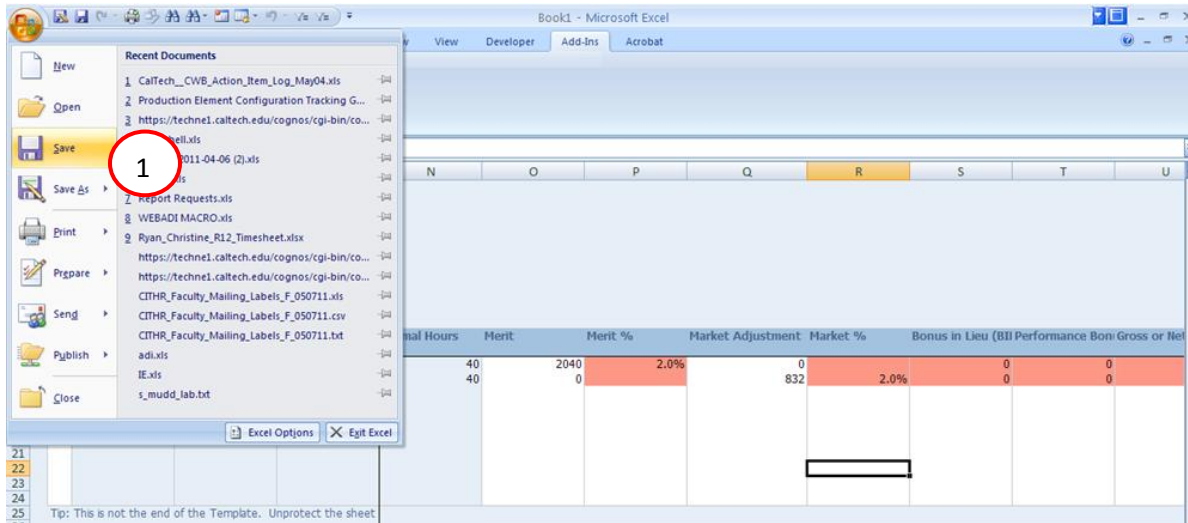


15) Click on the **Close** button.

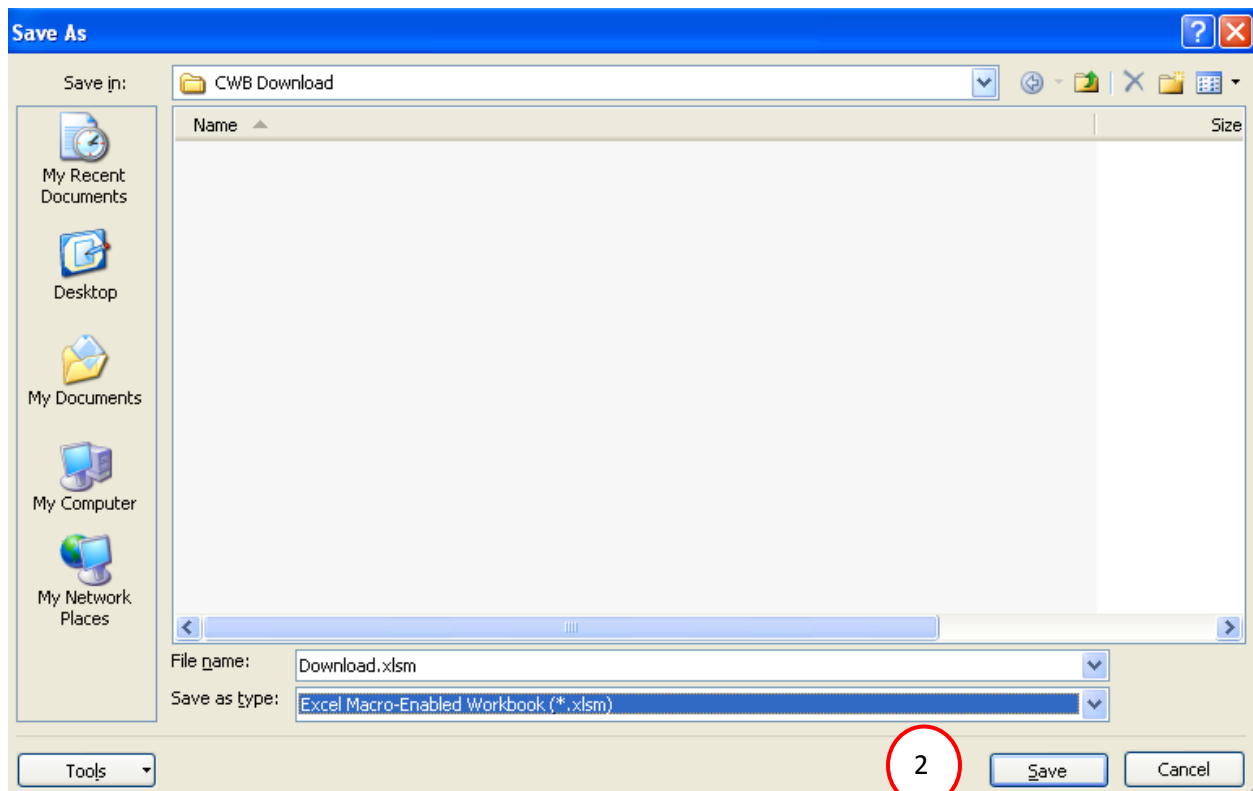
16) Close the spreadsheet. At the Excel prompt you may select *No* to save changes.

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*.

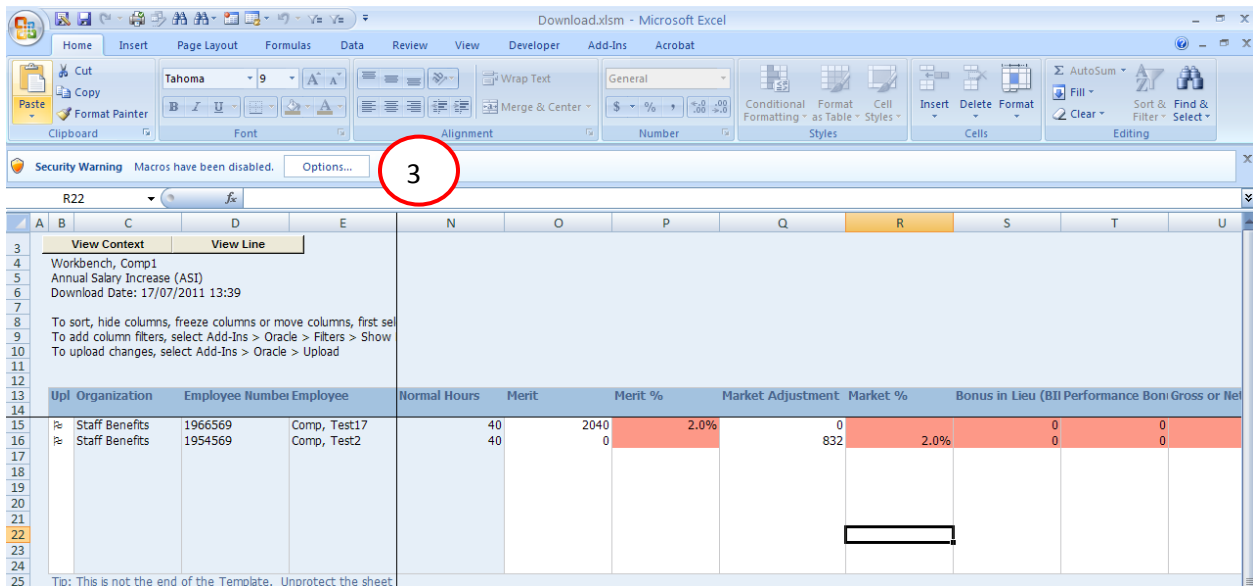


2) Change the *Save as type* to **Excel Macro-Enabled Workbook (\*.xlm)**, enter a **File Name** and click on the **Save** button.

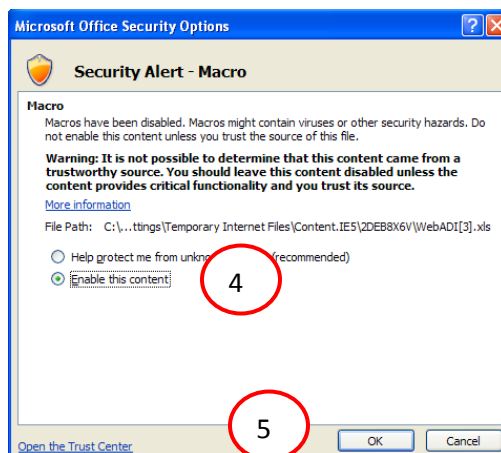
## Uploading a Saved Spreadsheet

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.

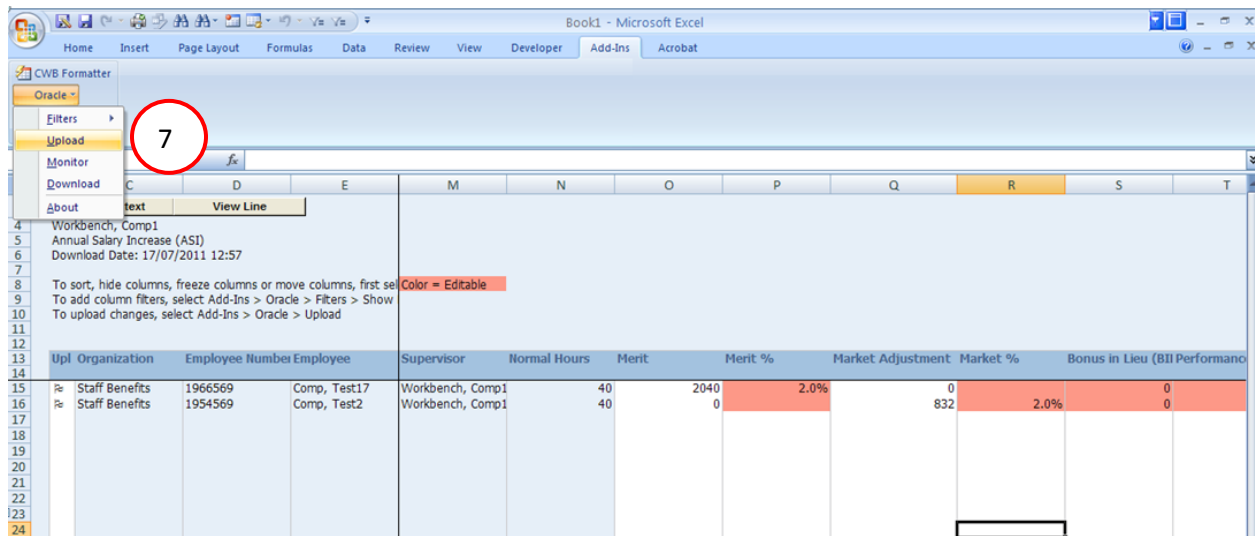


- 3) Click on **Options...**



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



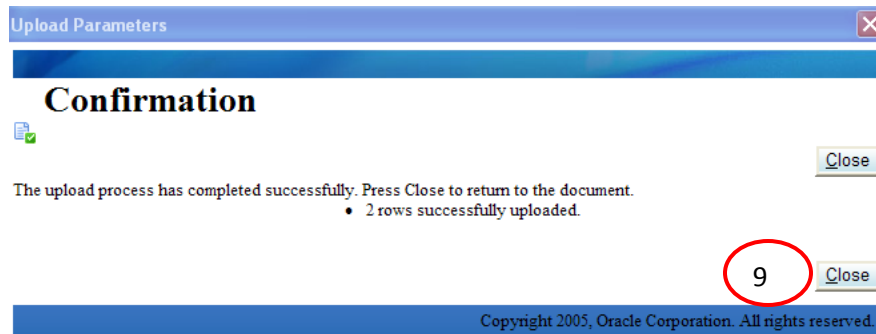


7) Select **Upload** from the *Oracle* menu.



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

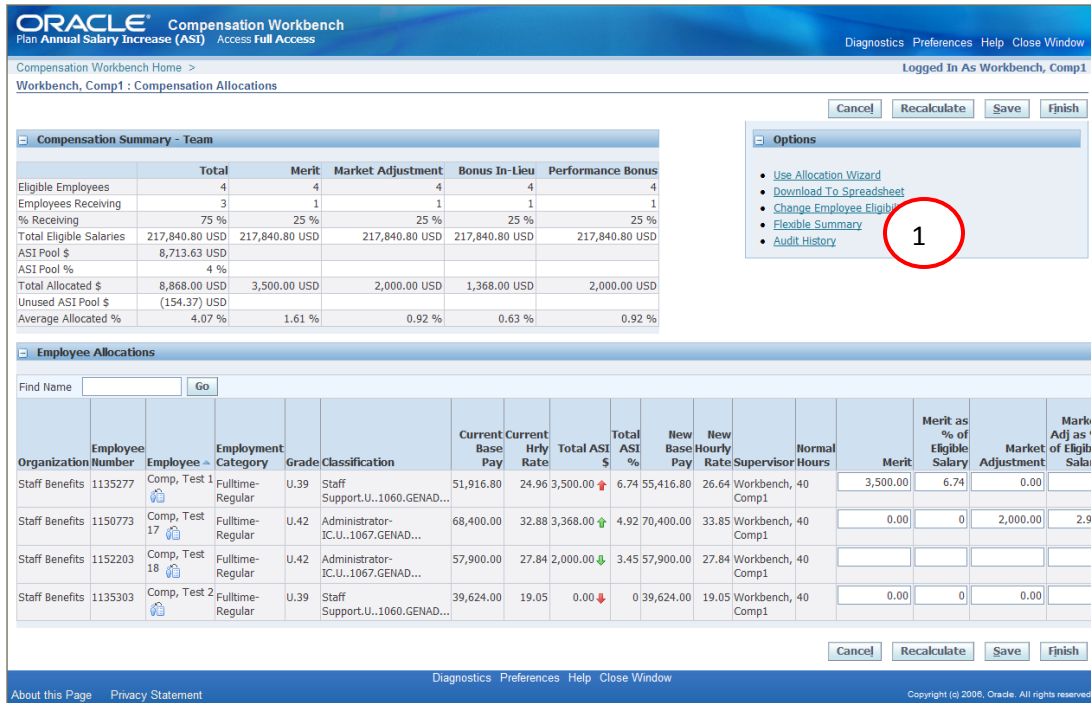
The Confirmation window will appear.



- 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.



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

Compensation Workbench Home > Workbench, Comp1 : Compensation Allocations

Logged In As Workbench, Comp1

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	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 %

**Options**

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

**Employee Allocations**

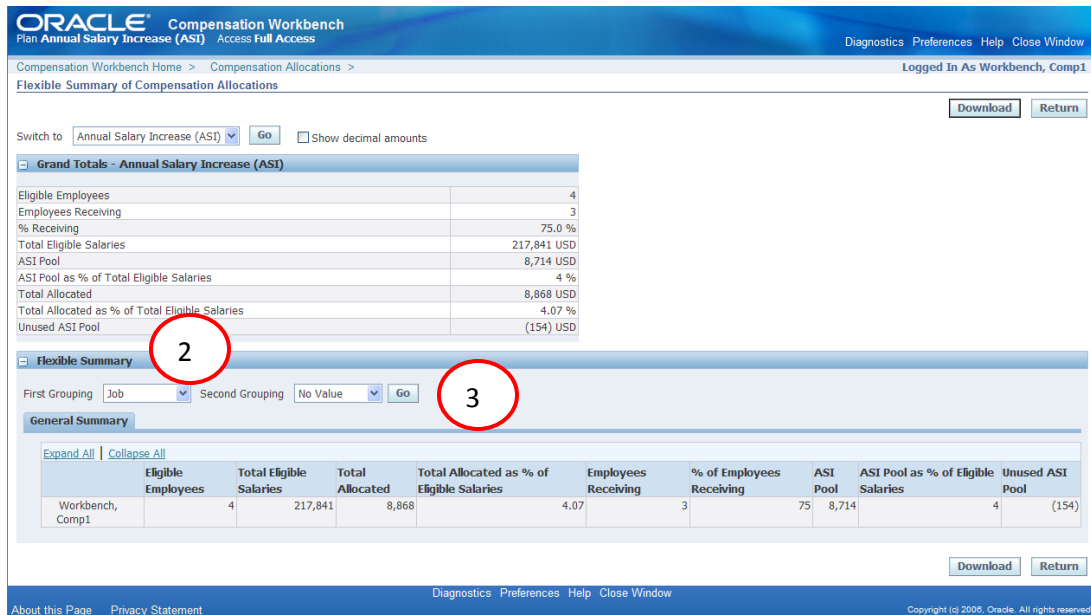
Find Name  Go

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				
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

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



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

Compensation Workbench Home > Compensation Allocations > Flexible Summary of Compensation Allocations

Logged In As Workbench, Comp1

Download Return

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 No Value 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	ASI Pool	ASI Pool as % of Eligible Salaries	Unused ASI Pool
Workbench, Comp1	4	217,841	8,868	4.07	3	75	8,714	4	(154)

Download Return

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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

Diagnostics 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

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Diagnostics Preferences Help Close Window

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- 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

Diagnostics 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

Diagnostics Preferences Help Close Window

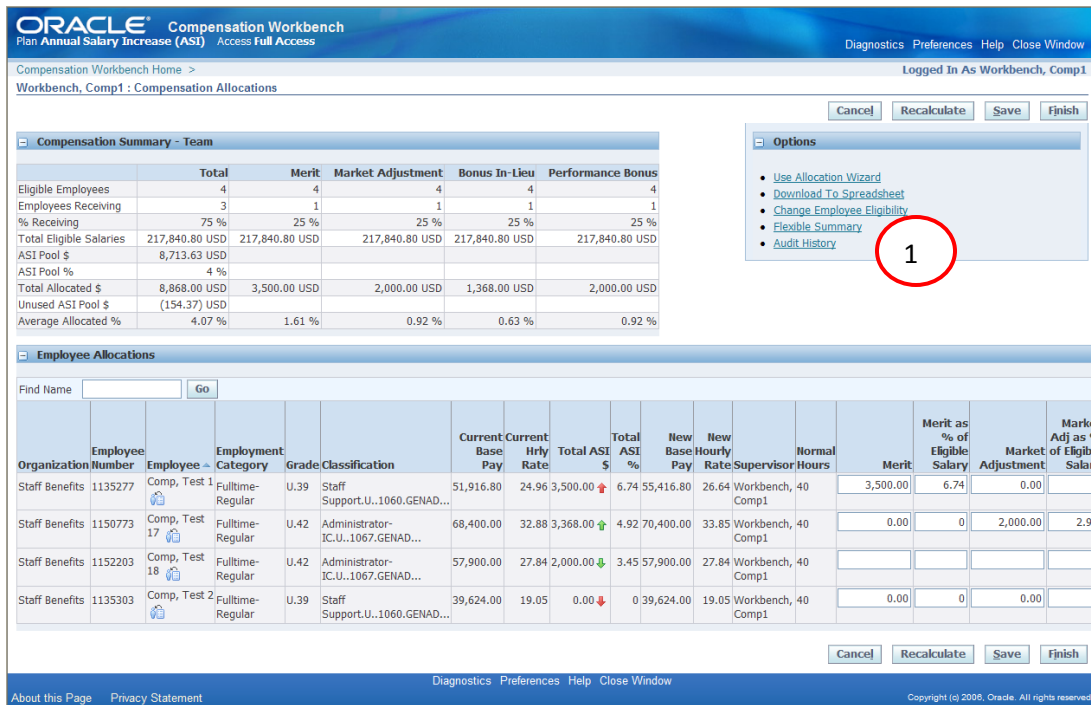
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You may now view your ASI allocations broken down by the employee Job and Grade information.

- 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.



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

Compensation Workbench Home > Workbench, Comp1 : Compensation Allocations

Logged In As Workbench, Comp1

Buttons: 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	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**

Find Name  Go

Organization	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-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				
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

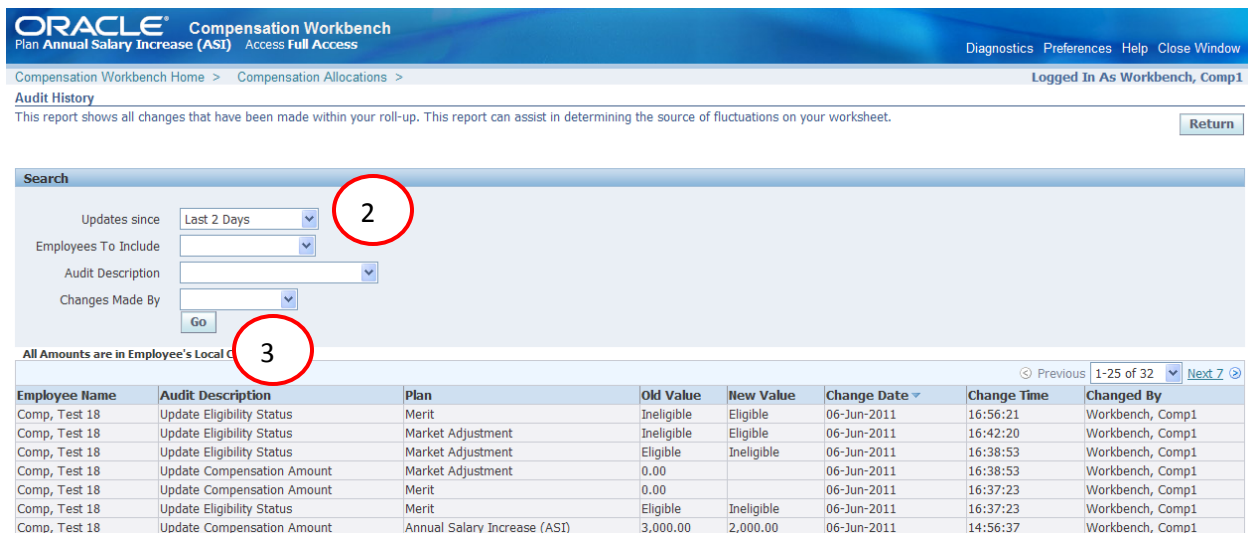
Buttons: Cancel Recalculate Save Finish

About this Page Privacy Statement

Diagnostics Preferences Help Close Window

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



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

Compensation Workbench Home > Compensation Allocations > **Audit History**

Logged In As Workbench, Comp1

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.

Return

**Search**

Updates since: Last 2 Days (circled with 2)

Employees To Include:

Audit Description:

Changes Made By:

Go (circled with 3)

All Amounts are in Employee's Local Currency

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

Previous 1-25 of 32 Next 7

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.

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

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

**Audit History**

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.

**Search**

Updates since: Last 2 Days  
Employees To Include:  
Audit Description: Update Eligibility Status  
Changes Made By:  
Go

**All Amounts are in Employee's Local**

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

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- 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.

Diagnostics Preferences Help Close Window

Logged in As Workbench, Comp1

Cancel Recalculate Save Finish

**Options**

- ☐ Use Allocation Wizard
- ☐ Download To Spreadsheet
- ☐ Change Employee Eligibility
- ☐ Flexible Summary
- ☐ 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 Details	Gross Net	Message	Action	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	
1.85 Workbench, 40 Comp1		0.00	0	2,000.00	2.92	1,368.00	2	0.00	0						4	2	
7.84 Workbench, 40 Comp1						0.00	0	2,000.00	3.45		Net				4	2	
7.05 Workbench, 40 Comp1		0.00	0	0.00	0	0.00	0	0.00	0						4	2	

Cancel
Recalculate
Save
Finish

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

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

Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Notes about Comp, Test 1

Logged In As Workbench, Comp

Cancel Apply

Comment

Enter your comments here.

3

Attachment

To provide justification, you can attach supporting documents or links to documents.

Attachments None Add...


4

Apply

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Preferences Diagnostics Preferences Help Close Window

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

## Deleting a Note

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

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

Compensation Workbench Home > Compensation Allocations > Notes about Comp, Test 1

Comment

1

Attachment

To provide justification, you can attach supporting documents or links to documents.  
Attachments: None Add...

2 Apply

About this Page Privacy Statement Preferences Diagnostics Preferences Help Close Window

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- 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.

Diagnostics Preferences Help Close Window

Logged In As Workbench, Comp1

Cancel Recalculate Save Finish

Options

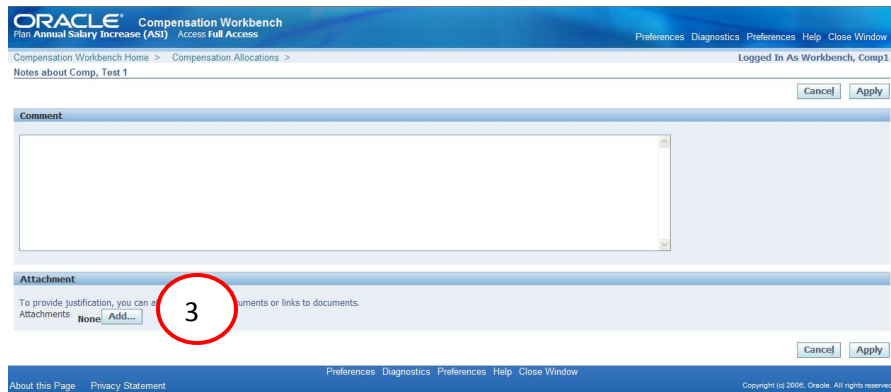
- Use Allocation Wizard
- Download To Spreadsheet
- Change Employee Eligibility
- Flexible Summary
- Audit History

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

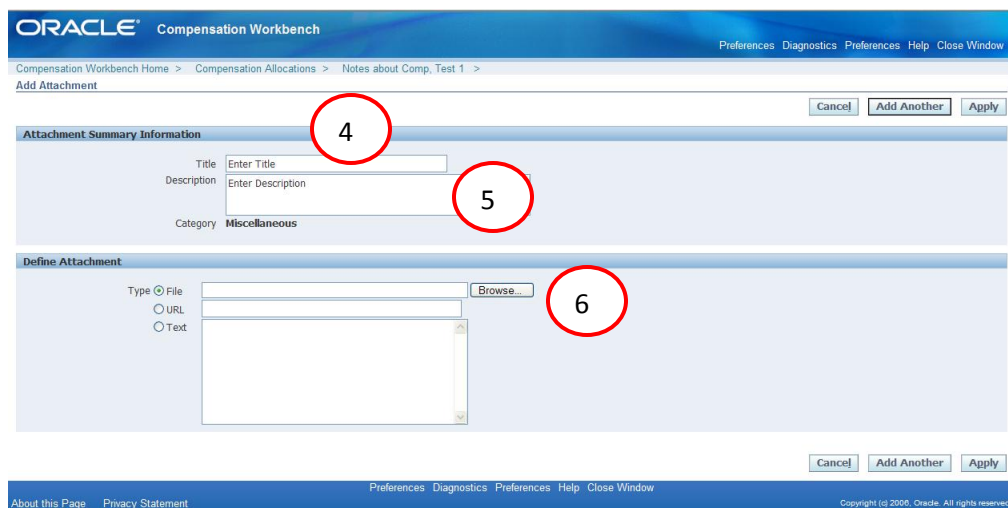
Cancel Recalculate Save Finish

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





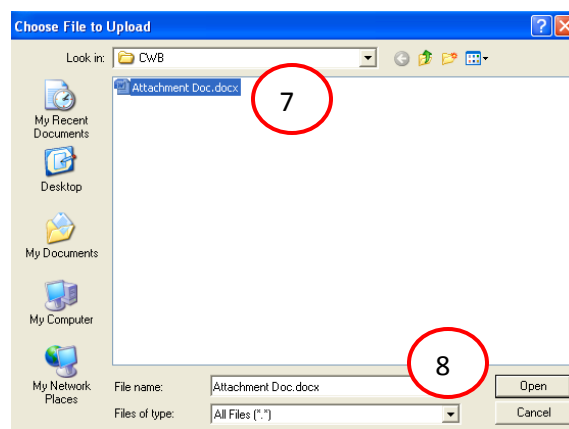
3) Click on the **Add...** button.



4) Enter a **Title**.

5) Enter a **Description**.

6) Click on the **Browse...** button.



7) Locate your attachment.

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

**ORACLE Compensation Workbench** Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Notes about Comp, Test 1 >

Add Attachment Cancel Add Another Apply

**Attachment Summary Information**

Title Enter Title

Description Enter Description

Category Miscellaneous

**Define Attachment**

Type ☒ File ☐ URL ☐ Text

C:\Documents and Settings\cryan\Desktop\Desktop\CWE Browse...

Cancel 1 Apply

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

A *Confirmation* message will appear

**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

**Confirmation**

Attachment Enter Title has been added successfully but not committed; it would be committed when you commit the rest of the current transaction.

Notes about Comp, Test 1 Cancel Apply

**Comment**

**Attachment**

To provide justification, you can attach supporting documents or links to documents.

Attachments View Add...

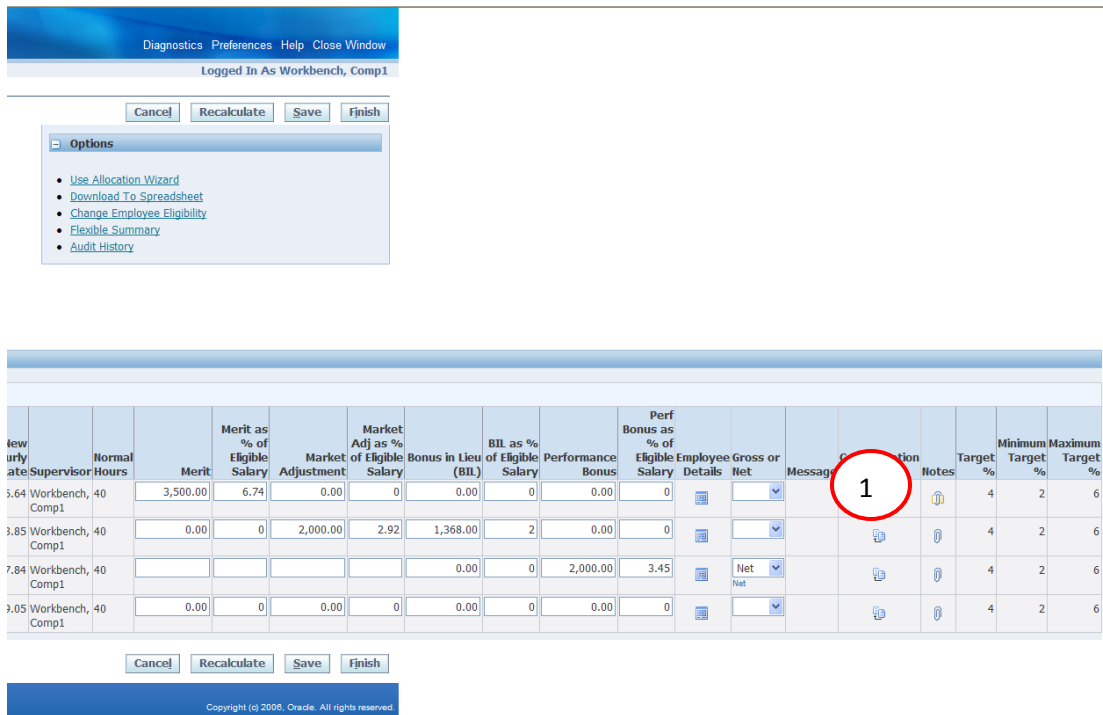
Cancel 10 Apply

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

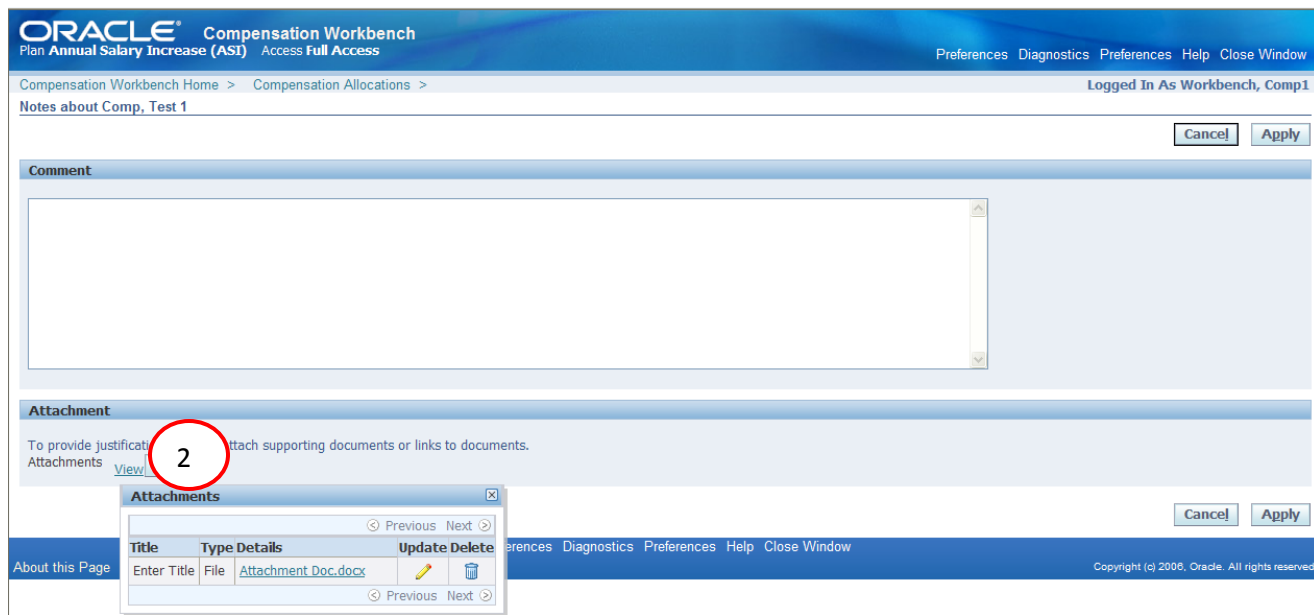
## Updating an Attachment

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's a menu bar with 'Diagnostics', 'Preferences', 'Help', and 'Close Window'. Below it, a status bar says 'Logged In As Workbench, Comp1'. A toolbar contains 'Cancel', 'Recalculate', 'Save', and 'Finish' buttons. An 'Options' menu is open, listing several actions: 'Use Allocation Wizard', 'Download To Spreadsheet', 'Change Employee Eligibility', 'Flexible Summary', and 'Audit History'. The 'Use Allocation Wizard' option is highlighted with a red circle and the number '1'.

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



The screenshot shows the 'Notes about Comp, Test 1' page in Oracle Compensation Workbench. The page has a header with 'ORACLE Compensation Workbench' and 'Plan Annual Salary Increase (ASI) Access Full Access'. A navigation bar shows 'Compensation Workbench Home > Compensation Allocations >'. The main content area has a 'Comment' section with a text box and a 'View' link. Below this is an 'Attachment' section with a message: 'To provide justification, attach supporting documents or links to documents.' The 'View' link is highlighted with a red circle and the number '2'. An 'Attachments' dialog box is open, showing a table with columns 'Title', 'Type', 'Details', 'Update', and 'Delete'. The table contains one row with 'Attachment Doc.docx' in the 'Details' column.

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

**ORACLE Compensation Workbench** Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Notes about Comp. Test 1 >

**Attachments**

**Search**

Note that the search is case insensitive

Title

[Show More Search Options](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
<a href="#">Enter Title</a>	File	Enter Description	Miscellaneous	COMP1	07-Jun-2011	One		

[Return to Notes about Comp. Test 1](#)

About this Page Privacy Statement Preferences Diagnostics Preferences Help Close Window

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

**ORACLE Compensation Workbench** Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Notes about Comp. Test 1 > Attachments >

**Update Attachment: Enter Title**

**Attachment Summary Information**

Title

Description

Category **Miscellaneous**

**Define Attachment**

File

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

A *Confirmation* message will appear

**ORACLE Compensation Workbench** Preferences Diagnostics Preferences Help Close Window

Compensation Workbench Home > Compensation Allocations > Notes about Comp. Test 1 >

**Confirmation**

Attachment Change Title has been updated successfully but not committed; it would be committed when you commit the rest of the current transaction.

**Attachments**

**Search**

Note that the search is case insensitive

Title

[Show More Search Options](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
<a href="#">Change Title</a>	File	Change Description	Miscellaneous	COMP1	07-Jun-2011	One-Time		

[Return to Notes about Comp. Test 1](#)

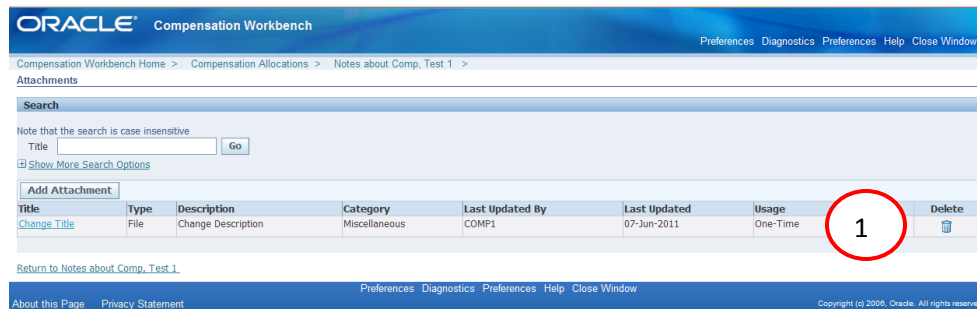
About this Page Privacy Statement Preferences Diagnostics Preferences Help Close Window

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

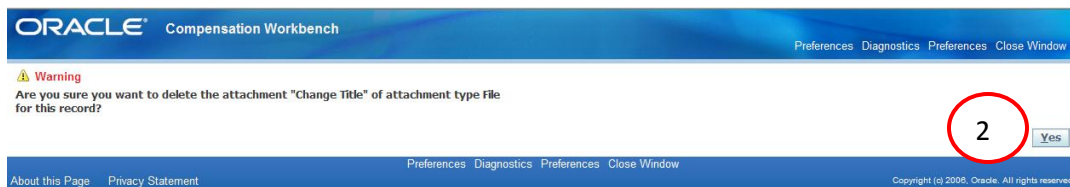
- 7) Click on the **Return to Notes about (employee name)** link.

## Deleting an Attachment

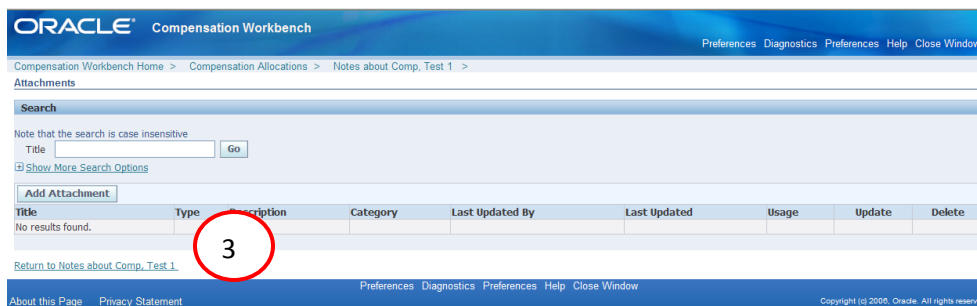


- 1) Click on the **Delete**  icon.

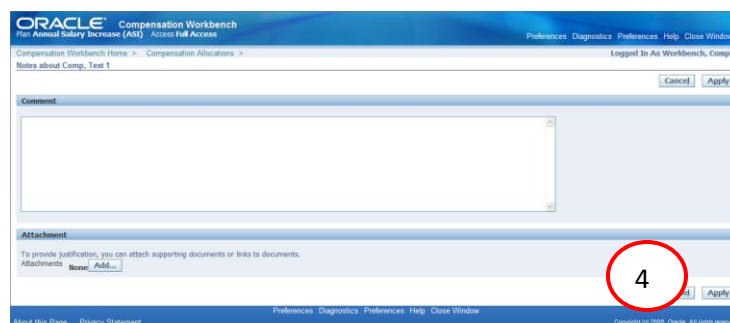
A *Warning* message will appear



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



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

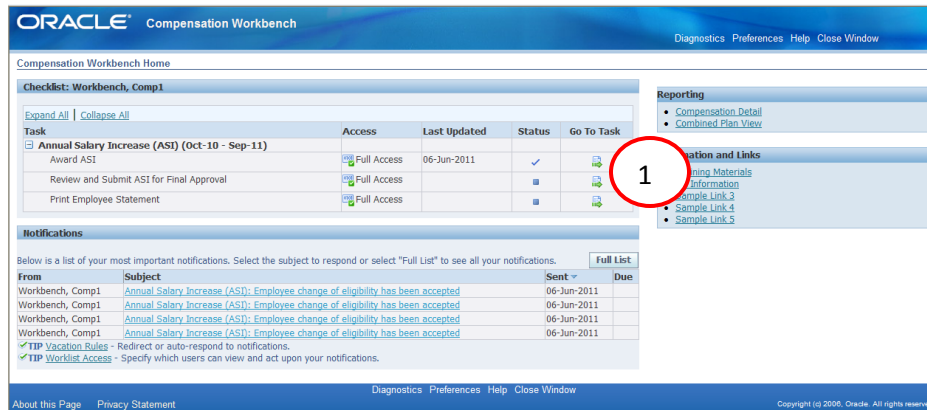


- 4) Click on the **Apply**  button.

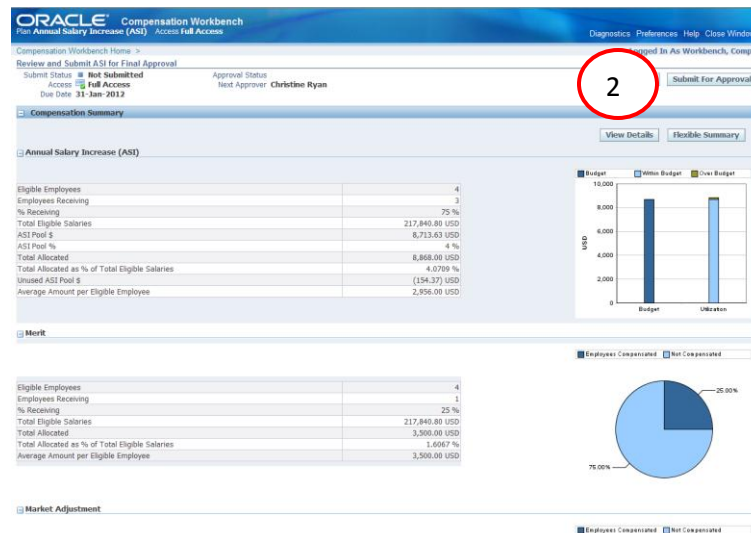
## Review and Submit ASI for Final Approval

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

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

Diagnostics Preferences Close Window

Logged In As Workbench, Comp1

Information

Are you sure you want to submit to the next level?

- This will prevent you from making further updates.
- This will notify your higher manager that you are finished.

3 Yes

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Diagnostics Preferences Close Window

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3) Click on the  button.

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

Diagnostics Preferences Close Window

Logged In As Workbench, Comp1

Comments

Do you wish to notify your approver?

☒ Yes, notify my approver

Include Comments

☐ No, do not notify my approver

4 Submit

Cancel Submit

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Diagnostics Preferences Close Window

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4) Click on the  button.

The *Confirmation* window will open

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

Diagnostics Preferences Close Window

Logged In As Workbench, Comp1

Confirmation

Your updates have been submitted for Approval.

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.

5 OK

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5) Click on the  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.

**ORACLE Compensation Workbench**  
Plan Annual Salary Increase (ASI) Access Read Only

Compensation Workbench Home >  
Review and Submit ASI for Final Approval

Submit Status: Submitted (07-JUN-2011) Approval Status: Next Approver: Christine Ryan  
Access: Read Only  
Due Date: 31-Jan-2012

**1** Recall Submission

**Compensation Summary**

View Details Flexible Summary

**Annual Salary Increase (ASI)**

Eligible Employees	4
Employees Receiving	3
% Receiving	75 %
Total Eligible Salaries	217,840.80 USD
ASI Pool \$	8,713.63 USD
ASI Pool %	4 %
Total Allocated	8,868.00 USD
Total Allocated as % of Total Eligible Salaries	4.0709 %
Unused ASI Pool \$	(154.37) USD
Average Amount per Eligible Employee	2,956.00 USD

**Merit**

Eligible Employees	4
Employees Receiving	1
% Receiving	25 %
Total Eligible Salaries	217,840.80 USD
Total Allocated	3,500.00 USD
Total Allocated as % of Total Eligible Salaries	1.6067 %
Average Amount per Eligible Employee	3,500.00 USD

**Market Adjustment**

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

**ORACLE Compensation Workbench**  
Plan Annual Salary Increase (ASI) Access Read Only

Recall Submission

Do you wish to recall your submitted worksheet?  
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 will be required to submit for approval once again after making desired changes.

**2** Yes

**Notification Comments**

Enter reason for recalling submission.

No Yes

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

**ORACLE Compensation Workbench**  
Plan Annual Salary Increase (ASI) Access Read Only

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.

**3** Return to Home

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

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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 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

Diagnostics Home Logout Preferences Help

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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**

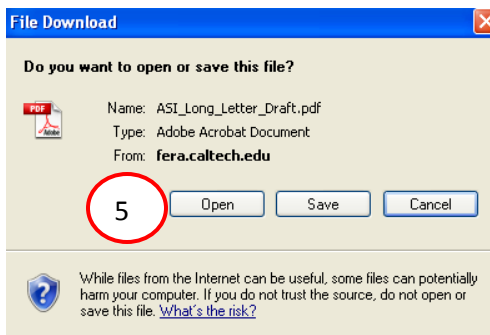
Document Name	Short Name
<a href="#">Draft ASI Short Letter v29</a>	Draft_ASI_Short_Letter_v29
<a href="#">ASI Statement Draft v30</a>	ASI_Statement_Draft_v30
<a href="#">ASI Long Letter Draft</a>	ASI_Long_Letter_Draft

[Return](#)

Diagnostics Preferences Help Close Window

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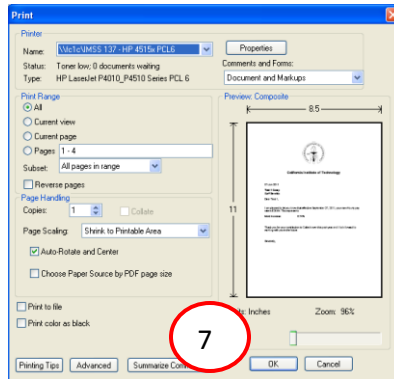
- 4) Click on your preferred Document. For this example, we will click on the **ASI Long Letter Draft**.



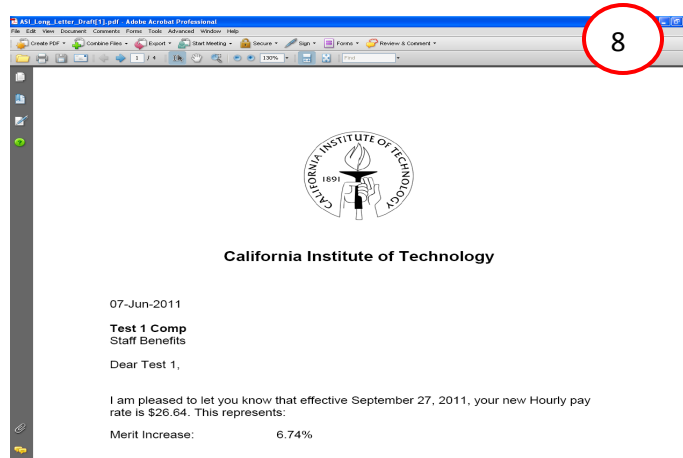
- 5) Click on the **Open** button.



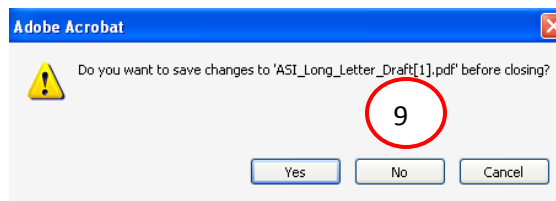
- 6) Click on the **Printer** icon.



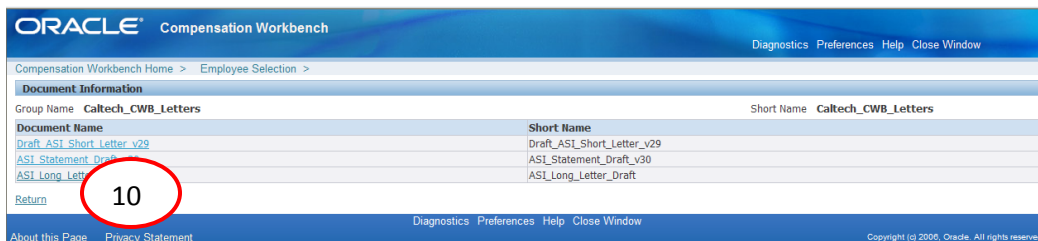
7) Click on the **OK** button.



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



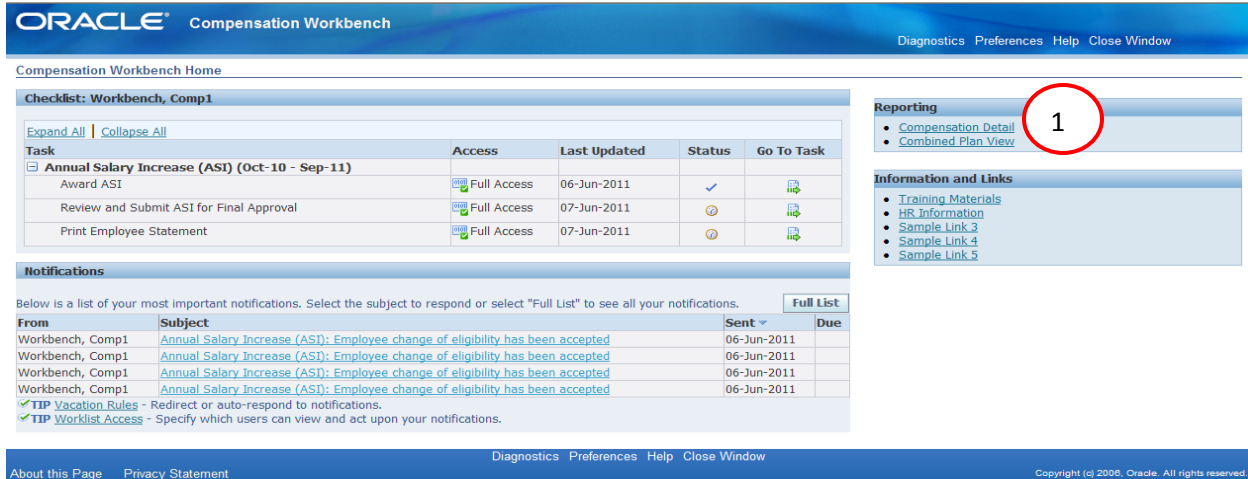
9) Click on the **No** button.



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
<b>Annual Salary Increase (ASI) (Oct-10 - Sep-11)</b>				
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	

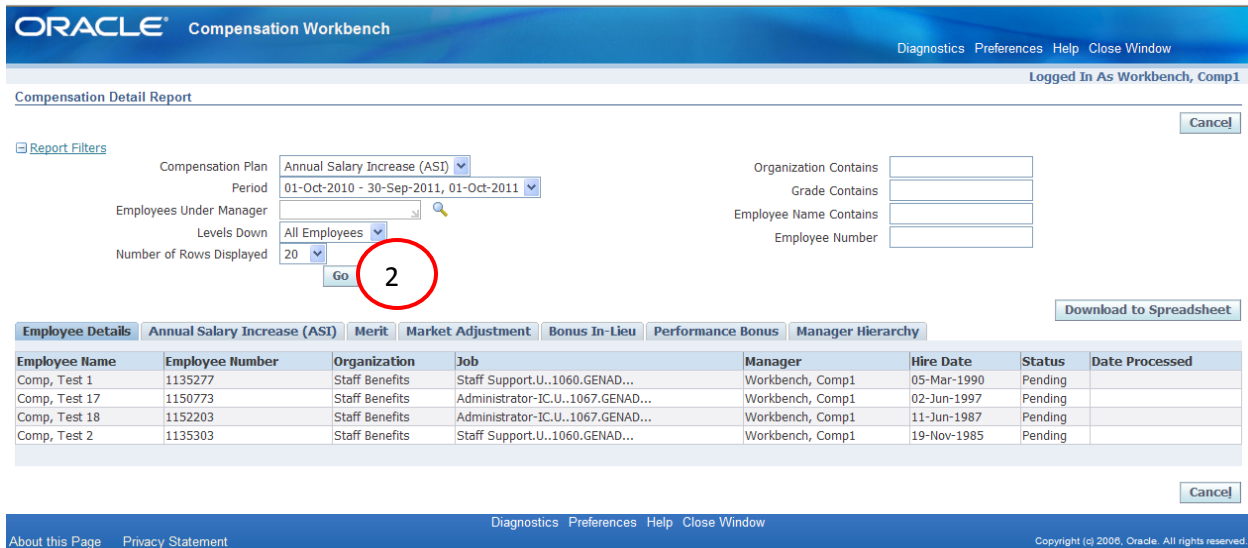
Full List

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

Diagnosics Preferences Help Close Window

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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

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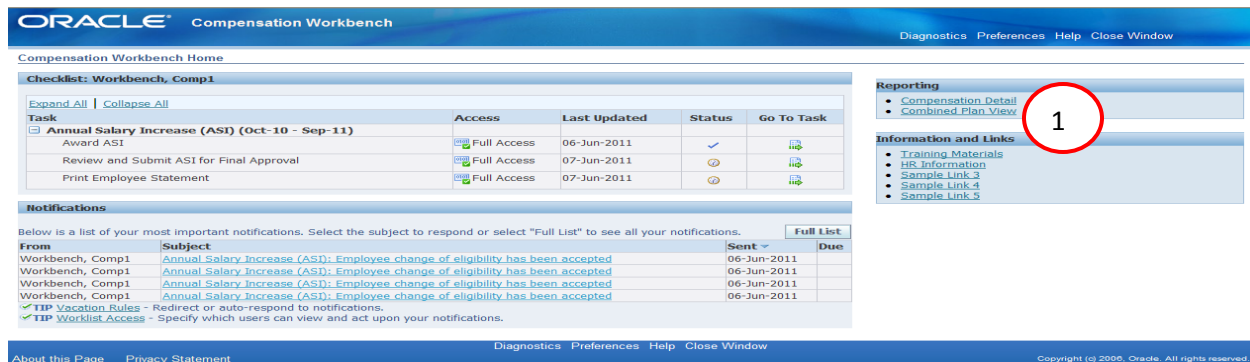
2) Click on the **Go** button.

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.

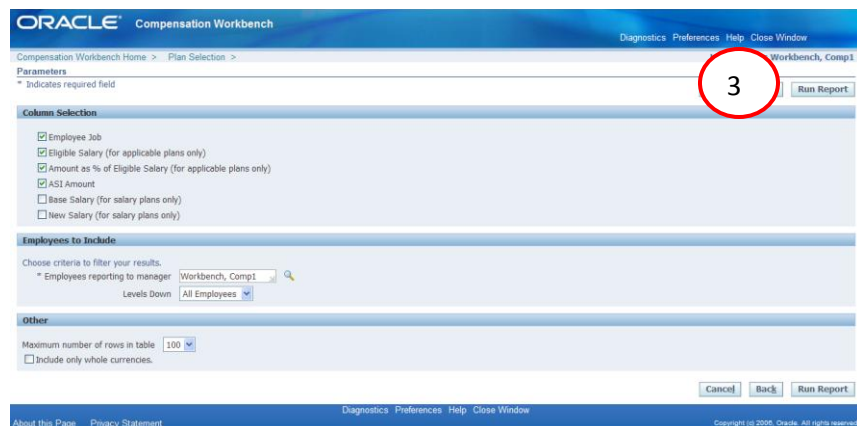
### Running the Report



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



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



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

ORACLE Compensation Workbench

Diagnostics Preferences Help Close Window

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

Combined Plan View Report

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	4
Employees Receiving	1	1	1		1	3
% Receiving	25%	25%	25%		25%	75%
Total Eligible Salaries	217840.8 null	217840.8 null	217840.8 null		217840.8 null	217840.8 null
Total Allocated	3500	2000	1368		2000	8868
Average Amount Allocated	3500	2000	1368		2000	2956
Average % of Eligible Salaries	1.6%	0.9%	0.6%		0.9%	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)		Employee					
		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						
Test 1 Comp	Staff Support.U..1060.GENAD...	51,916.80	3,500.00	6.7	51,916.80	0.00	0	51,916.80	0.00	0	51,916.80	3,500.00	6.7	Test 1 Comp			
Test 17 Comp	Administrator-IC.U..1067.GENAD...	68,400.00	0.00	0	68,400.00	2,000.00	2.9	68,400.00	1,368.00	2	68,400.00	0.00	0	68,400.00	3,368.00	4.9	Test 17 Comp
Test 18 Comp	Administrator-IC.U..1067.GENAD...	57,900.00			57,900.00			57,900.00	0.00	0	57,900.00	2,000.00	3.5	57,900.00	2,000.00	3.5	Test 18 Comp
Test 2 Comp	Staff Support.U..106...	39,624.00	0.00	0	39,624.00	0.00	0	39,624.00	0.00	0	39,624.00	0.00	0	39,624.00	0.00	0	Test 2 Comp

Return to Parameters

4

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**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

4) Click on the **Return to Parameters** link.

**ORACLE Compensation Workbench** Diagnostics 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.

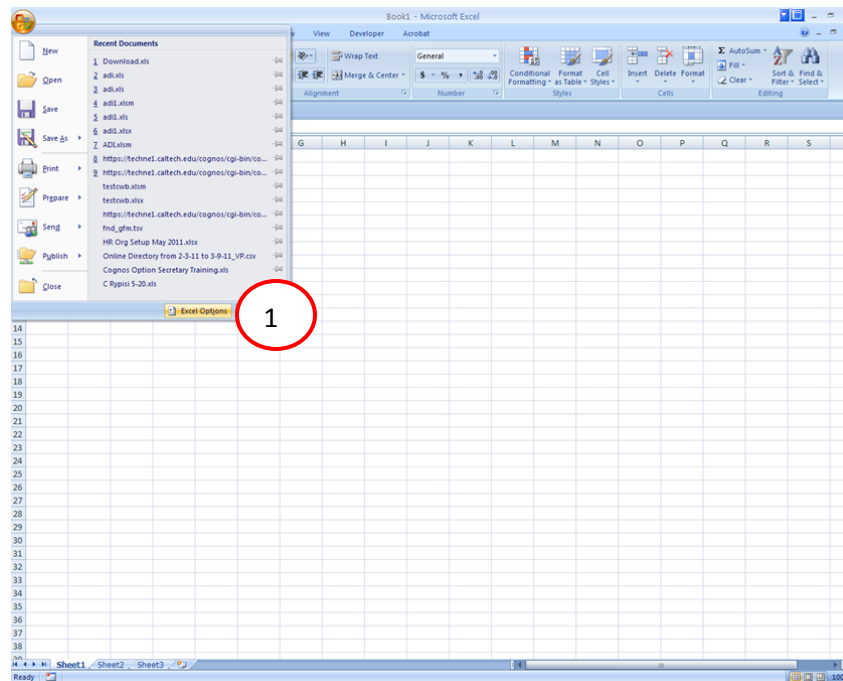
[Cancel](#) [Back](#) [Run Report](#)

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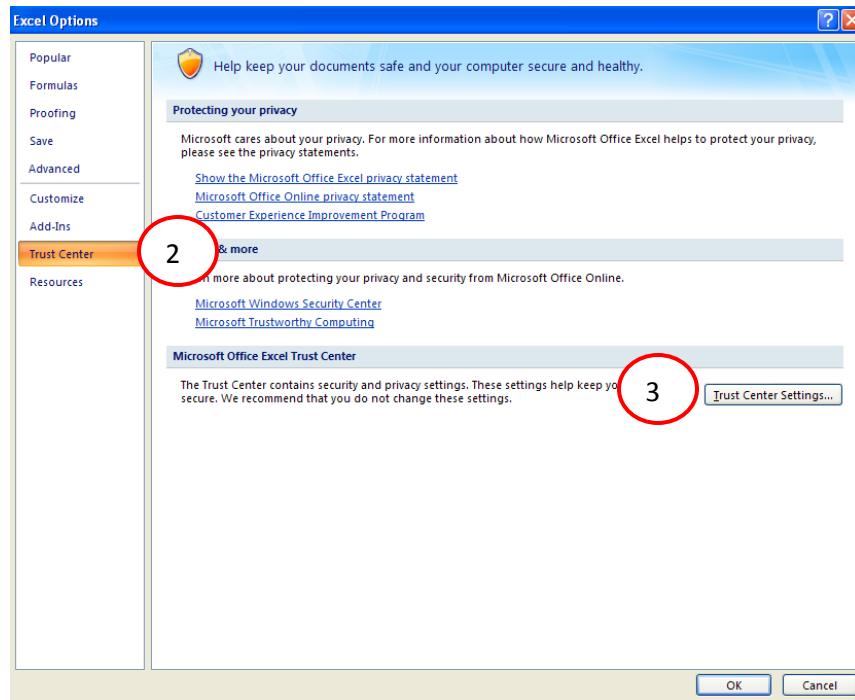
In the Parameters window you have the ability to select which columns you would like to appear in your report.

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.

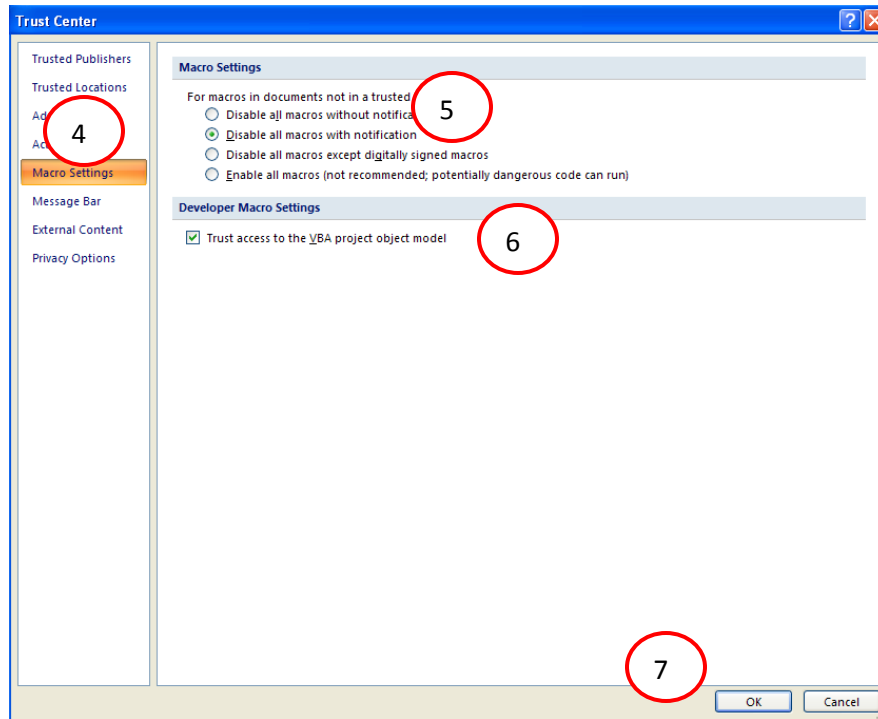
## Excel Settings Required for Download to Spreadsheet



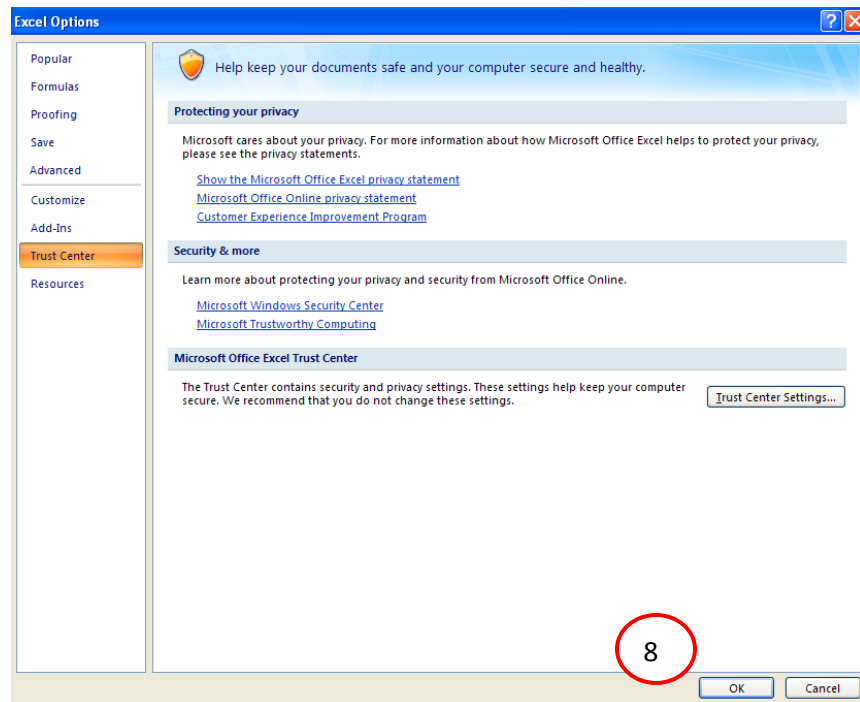
1) Select **Excel Options** from the *Office Button* drop down menu.



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



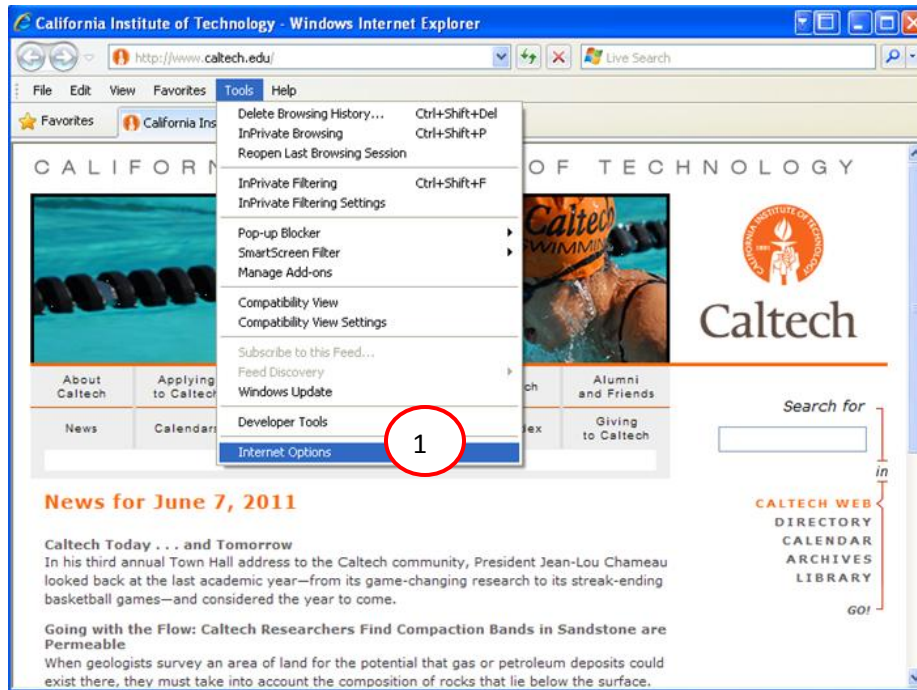
- 4) Click on **Macro Settings**.
- 5) Click on the **Disable all macros with notification** radio button.
- 6) Click on the **Trust access to the VBA project object mode** box.
- 7) Click on the **OK** button.



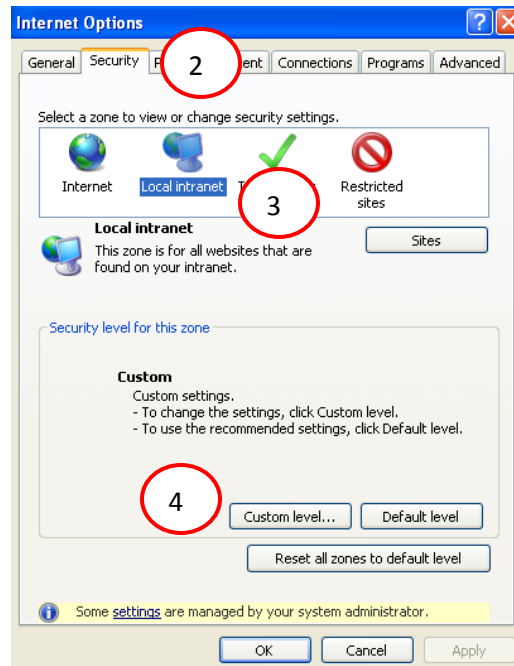
- 8) Click on the **OK** button.



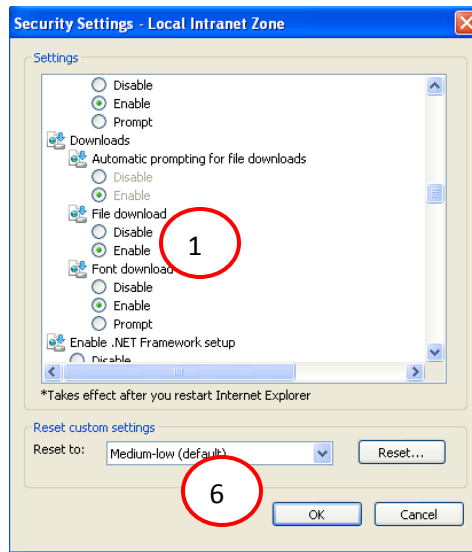
## Internet Explorer Settings Required for Download to Spreadsheet



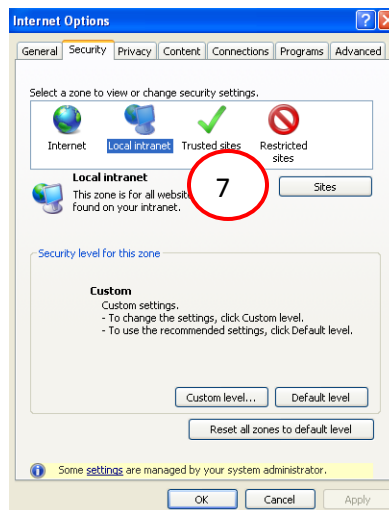
1) Select **Internet Options** from the *Tools* menu.



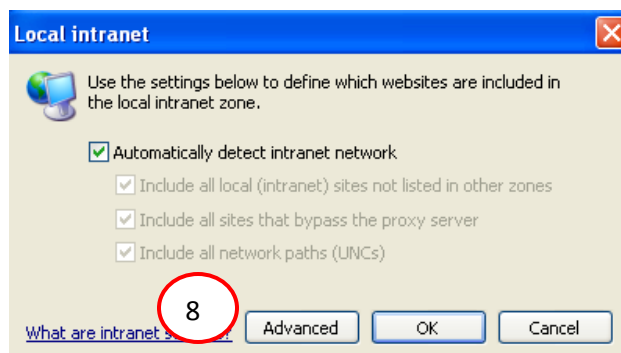
- 2) Click on the **Security Tab**.
- 3) Click on the **Local Intranet** icon.
- 4) Click on the **Custom level** button.



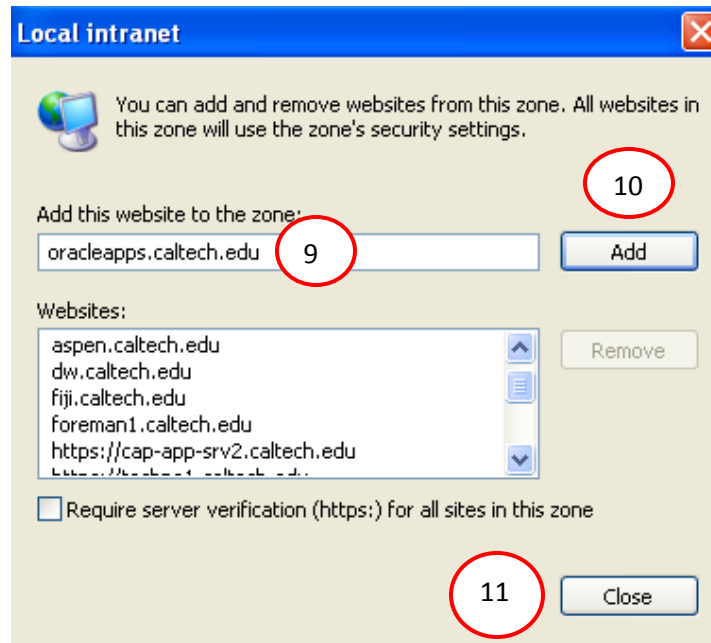
- 5) Scroll down to the *Downloads* area and click on the *File Download* **Enable** radio button.
- 6) Click on the **OK** button.



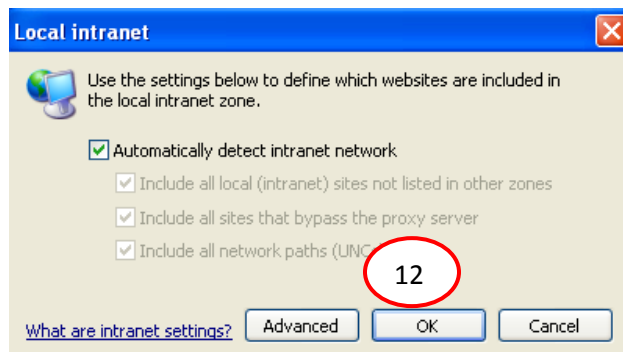
- 7) With the *Local Intranet* icon still highlighted, click on the **Sites** button.



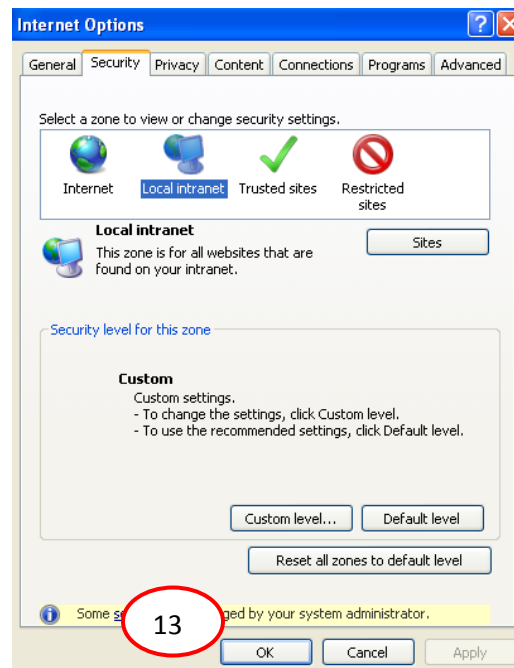
- 8) Click on the **Advanced** button.



- 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.