Compensation Workbench
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Logging into Compensation Workbench

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

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

3) Click on the Compensation Workbench link.
   The Compensation Workbench Home page will open.
Compensation Allocations Page

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

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

The Compensation Allocations window will open.
Viewing Job History

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

The **Job History** window will open.

### Performance and Promotion History Popup

#### Job History

<table>
<thead>
<tr>
<th>Date</th>
<th>Job</th>
<th>Grade</th>
<th>People Group</th>
<th>Change Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-MAR-2007</td>
<td>Staff Support.U..1060.GENAD...</td>
<td>U.39</td>
<td>Staff.Yes.No...R2..Assistant</td>
<td>Work Location Change</td>
</tr>
<tr>
<td>04-MAR-2002</td>
<td>Materiel Handling.U..1055.FACTR...</td>
<td>U.39</td>
<td>Staff.Yes.No...R2..Senior</td>
<td>Promotion</td>
</tr>
<tr>
<td>06-NOV-2000</td>
<td>Sr Division/Depart Assistant.O.06.38....</td>
<td>0.06</td>
<td>Staff.Yes.No...R2..</td>
<td>Promotion</td>
</tr>
</tbody>
</table>

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

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

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

5) Click on the Return button to close the window.
6) Scroll to the right and click on the Compensation History icon. The Compensation History window will open.

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

7) Click on the 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.

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

- Employees Receiving is 1
- % Receiving is 25%
- Total Allocated $ is 3,500.00
- Unused ASI Pool $ is 5,213.63
- Average Allocated % is 1.61
Entering a Merit Allocation

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

1) Place your cursor in the Merit field for the employee on line one and enter **3500** in the *Merit* column.

2) Select the **Save** button to save your work.

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

Entering a Market Adjustment and Bonus In-Lieu

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

3) Enter **2000** in the *Market Adjustment* column and **2** in the *BIL as % of Eligible Salary* column.

4) Select the **Save** button to save your work.
Entering a Performance Bonus

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

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 button to save your work.
8) Once you have completed entering all of your allocations, click on the 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.

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

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

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

5) Click on the Next button.

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

7) Click on the Next button.

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

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.

1) Click on the **Change Employee Eligibility** link.
2) For the employee on line three we will select **Ineligible** from the **Merit** drop down menu.

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

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

5) Click on the **Submit** icon.

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

The **Compensation Allocations** window will open.
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.

1) Click on the **Change Employee Eligibility** link.
2) For the employee on line three we will select **Eligible** from the **Merit** drop down menu.

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

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

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

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

The **Compensation Allocations** window will open
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.

1) Click on the Change Employee Eligibility link.
NOTE: All of your eligible and ineligible employees are listed on the page. You must run a query to view only those employees that are ineligible.

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

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.

1) Click on the Download to Spreadsheet link.
2) Click on the **Download Default Definition** button.

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

4) Click on **Download File**.

5) Click on **Open**.
An Excel spreadsheet will open.

6) Click on Options…

7) Click on the Enable this content radio button.
8) Click on the OK button.

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

9) Click on the Close button.

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

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

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

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)

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 ( *.xlsm)**, 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.

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

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

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

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

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.

1) Click on the Audit History link.

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.

4) Select **Update Eligibility Status** from the *Audit Description* drop down menu.
5) Click on the  button.
6) Click on the  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.

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

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.

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.
2) Click on the Notes icon for the employee on line one.
3) Click on the **Add** button.

4) Enter a **Title**.

5) Enter a **Description**.

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

7) Locate your attachment.

8) Click on the **Open** button.
9) Click on the Apply button. A Confirmation message will appear

10) Click on the Apply button.
**Updating an Attachment**

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

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

2) Click on the View link.
3) Click on the Update icon.

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

A Confirmation message will appear

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

7) Click on the Return to Notes about (employee name) link.
Deleting an Attachment

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

   A **Warning** message will appear

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

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

4) Click on the **Apply** button.
Review and Submit ASI for Final Approval

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

Submitting an ASI for Approval

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

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

2) Click on the Submit For Approval button.
The Information window will open

3) Click on the Yes button.

4) Click on the Submit button.

The Confirmation window will open

5) Click on the OK button.
Recalling a Submitted ASI

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

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

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

3) Click on the **Return to Home** button.
Printing Employee Statements

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

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

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

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

1) Click on the Compensation Detail link.

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.
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.

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 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.