

Oracle Compensation Workbench (CWB)

PERFORMANCE AND MERIT PLANNING CYCLE: MANAGER USER GUIDE

June 2022

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I – Switch to Another Manager

Managers who have been given access in CWB can enter allocations for any employee who reports directly or indirectly to them, according to the supervisory hierarchy. Using the Switch Manager function, you can view and edit the information available to any manager within your security view.

Switch Manager enables you to act as another manager or as a super-user act on behalf of that manager, and do everything that the manager can do except view their notifications.

1. Go to Compensation Workbench Home:

Compensation Workbench Home

Checklist: Crane, Thomas

[Expand All](#) | [Collapse All](#)

Task	Access	Last Updated	Status	Go To Task
<input type="checkbox"/> All Tasks				
<input type="checkbox"/> Faculty Annual Salary Review (Jul-15 - Jun-16)				
Assign Performance Rating & Allocate Merit Pool	Full Access	09-Mar-2016	✓	
Approve Your Direct Managers	Full Access	09-Mar-2016	🕒	
Submit to Next Level Approver	Full Access		■	

Switch To Another Manager

To perform tasks as a different manager, select from the Switch To list and click the **Go** button.

[Search For A Manager](#)

Switch To:

Information and Links

- [Faculty Performance Rating Definitions](#)
- [Staff Performance Rating Definitions](#)
- [User Guide - Annual Salary Review Plan](#)

Notifications

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

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

2. To switch to a different Manager, select Search for a Manager in the Switch to a new Manager box on the right side of the screen

Simple Search

You can perform the tasks of another manager that is within your security privilege. Search for the manager, then click on the icon next to the manager's name. When searching for Employee Name, use this example: Smith%Joe

Employee Name

Employee Number

Email

Click to switch to this manager

3. Enter the employee name, number or email address of the employee who you want to change to

Simple Search

You can perform the tasks of another manager that is within your security privilege. Search for the manager, then click on the icon next to the manager's name. When searching for Employee Name, use this example: Smith%Joe

Employee Name

Employee Number

Email

Click to switch to this manager

Employee Name	Employee Number	Business Group	Job	Email
Crane, Thomas	██████	Rochester Institute of Technology	Instructional Faculty	██████@rit.edu

4. Select the icon on the right of the screen next to the Manager name to change to. Notice that now you are acting as that Manager.

II - Change Manager Access (Optional)

Managers have the ability to delegate tasks to their subordinate managers through the supervisory chain by switching to the highest level manager and then selecting managers within the hierarchy to change access.

****YOU WILL NEED TO COMPLETE THIS FOR EACH PLAN (FACULTY AND STAFF IF YOU HAVE BOTH)****

1. Navigate to the 'Assign Performance Rating & Allocate Merit Pool' task for the 'Faculty Annual Salary Plan' plan on the CWB Home page.

Compensation Workbench Home

Checklist: Crane, Thomas

Expand All | Collapse All

Task	Access	Last Updated	Status	Go To Task
All Tasks				
Faculty Annual Salary Review (Jul-15 - Jun-16)				
Assign Performance Rating & Allocate Merit Pool	Full Access	09-Mar-2016	✓	
Approve Your Direct Managers	Full Access	09-Mar-2016	⚠	
Submit to Next Level Approver	Full Access		■	

Notifications

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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.			

Switch To Another Manager

To perform tasks as a different manager, select from the Switch To list and click the Go button.

[Search For A Manager](#)

Switch To: Crane, Thomas

Information and Links

- [Faculty Performance Rating Definitions](#)
- [Staff Performance Rating Definitions](#)
- [User Guide - Annual Salary Review Plan](#)

2. Select the 'Change Access' link in the Options container

Cancel Recalculate and Save Finish

Options

- [Change Access](#)

3. Select the option that allows you to view the current access and then change the access.

Compensation Workbench Home > Compensation Allocations > Logged In As Smith, John P
Switched To Crane, Thomas

Change Access: Target Managers

Cancel Continue

This process allows you to lock, unlock, or revoke your managers' access to their tasks

Which managers would you like to change?

I wish to change the access of only the managers who report directly to me.

I wish to change the access of all of my managers.

I wish to view my managers' current access or choose from a list of managers to change.

Cancel Continue

- Select each manager that you want to change access for and press 'continue':

Change Access: Select Managers

Select those managers whose access you would like to change.

Manager Search

Search for

TIP When searching for Employee Name, use this example: Smith%Joe

Manager Selection

[Select All](#) | [Select None](#) | [Expand All](#) | [Collapse All](#)



Select	Focus	Name	Job	Access	Business Group
<input type="checkbox"/>	<input type="checkbox"/>	Crane, Thomas			
<input type="checkbox"/>		Greylek, Kim	Instructional Faculty	Full Access	Rochester Institute of Technology
<input type="checkbox"/>		March, Holden	Professional/Administrative	Read Only	Rochester Institute of Technology
<input type="checkbox"/>		Murphy, Declan	Instructional Faculty	Full Access	Rochester Institute of Technology
<input type="checkbox"/>		Preston, Lois	Instructional Faculty	Full Access	Rochester Institute of Technology
<input type="checkbox"/>		Raines, Andrew	Instructional Faculty	Full Access	Rochester Institute of Technology
<input type="checkbox"/>		Ramsey, Rebecca	Instructional Faculty	Full Access	Rochester Institute of Technology
<input checked="" type="checkbox"/>		Thornhill, Ariel	Instructional Faculty	Full Access	Rochester Institute of Technology
<input checked="" type="checkbox"/>		Trembley, Jack	Instructional Faculty	Full Access	Rochester Institute of Technology
<input checked="" type="checkbox"/>		Voight, Hank	Instructional Faculty	No Access	Rochester Institute of Technology

- Change managers currently with 'any' type of access to the type of access you wish to grant them. You can also choose whether or not you would like to notify those managers of their access.

Change Access: Select New Access

* Indicates required field

* Further limit target managers to those with this access

* Choose a new access for the Managers

Notifications

Do you wish to notify these managers of the change to their access?

Yes, notify my managers

Include Comments

No, do not notify my managers

- Press 'Submit' to change the manager's access. This will change the manager's access to CWB for this plan review period.

III – Entering Performance Ratings and Merit Increases (Worksheet)

The ‘Assign Performance Rating & Allocate Merit Pool’ task (aka Worksheet), is where managers will assign the performance ratings and merit and market/EP monetary awards. Managers can work on direct employees, manager teams or ‘allemployees’ within their supervisor hierarchy.

1. Navigate to ‘Assign Performance Rating & Allocate Merit Pool’ within the Annual Salary Review plan.

Compensation Workbench Home

Checklist: Crane, Thomas

Expand All | Collapse All

Task	Access	Last Updated	Status	Go To Task
<ul style="list-style-type: none"> Faculty Annual Salary Review (Jul-15 - Jun-16) <ul style="list-style-type: none"> Assign Performance Rating & Allocate Merit Pool Approve Your Direct Managers Submit to Next Level Approver 	Full Access	09-Mar-2016	✓	
	Full Access	09-Mar-2016	🕒	
	Full Access		■	

Notifications

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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.		

Switch To Another Manager

To perform tasks as a different manager, select from the Switch To list and click the Go button.

[Search For A Manager](#)

Switch To: Crane, Thomas

Information and Links

- Faculty Performance Rating Definitions
- Staff Performance Rating Definitions
- User Guide - Annual Salary Review Plan

The worksheet allows you to do the following:

- View summary totals for direct reports or team
- View information for direct employees, manager teams or ‘all employees’.
- Press ‘Recalculate and Save’ to update the summary table
- Return to the CWB Home page by pressing the ‘Compensation Workbench Home’ in the upper left
- SAVE YOUR WORK AS YOU GO!!!!!!!

Crane, Thomas : Compensation Allocations

Compensation Summary - Direct Reports

Show Summary for Team

		Merit Pool (All position funding types)
Eligible Employees		10
Employees Receiving		3
% Receiving		30 %
Total Eligible Salaries		1,489,584.00 USD
Merit Pool (All position funding types)		37,239.60 USD
Merit Pool (All position funding types) as % of Total Eligible Salaries		2.5 %
Total Allocated		15,091.50 USD
Unused Merit Pool (All position funding types)		22,148.10 USD
Average Allocated as % of Eligible Salaries		1.01 %
Total Merit Spend (All position funding types)		13,122.87 USD
Total Stipend Spend (All position funding types)		1,968.63 USD

Employee Allocations

Filters: All Employees Find Name

Employee #	Employee	Position	Time in Grade	Previous Rating	Proposed Rating	Merit Eligible Salary	Merit Eligible Annualized Salary	Current Comparison	Merit %	Merit \$	Proposed Annual Merit \$	Message	Market/EP %	Market/EP \$	Lump Sum Eligible Salary	Lump Sum %	Lump Sum \$	Proposed Comparison	New Salary	New Annualized Salary	Supervisor	Notes
		Sr Staff Asst	7.37	Staff - 4 - Exceeds Expectations	Faculty - 4 - Exceeds Expectations	20.18	36,727.60	100.10	2.75	0.55	1,001.00							102.85	20.73	37,728.60		
		Manager	4.12	Staff - 5 - Outstanding	Faculty - 4 - Exceeds Expectations	75,194.91	75,194.91	93.76	2.75	2,067.86	2,067.86		1	751.95				97.28	78,014.72	78,014.72		
		Career Custodian	5.72	Staff - 3 - Successful/Meets Expectations	Faculty - 3 - Meets Expectations	14.76	30,700.80	97.23	2.4	0.35	728.00							99.57	15.11	31,428.80		

Options

- Change Access

Compensation Summary Information

The summary information can be viewed for the entire 'Team' or by the manager's 'Direct Reports'. The summary information is specific to the manager that you are accessing. Please note that the summary information for salaries includes all salary information regardless of funding source.

Compensation Summary - Direct Reports	
Show Summary for Team	
Merit Pool (All position funding types)	
Eligible Employees	10
Employees Receiving	3
% Receiving	30 %
Total Eligible Salaries	1,489,584.00 USD
Merit Pool (All position funding types)	37,239.60 USD
Merit Pool (All position funding types) as % of Total Eligible Salaries	2.5 %
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Average Allocated as % of Eligible Salaries	1.01 %
Total Merit Spend (All position funding types)	13,122.87 USD
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Employee Allocations

The employee allocations section is where managers view and enter merit increases for eligible employees. Managers can choose to work with just 'Direct Employees', by subordinate manager teams or for 'All Employees' below them in the hierarchy.

The screenshot shows the 'Employee Allocations' header with a 'Filters' dropdown menu set to 'Direct Employees'. A 'Go' button is next to it. Below the dropdown, there are columns for 'Employee', 'Position', 'Rank', 'Time in Rank', and 'Performance Rating'.

NOTE: Changing the display in the Employee Allocations section does NOT change the information reflected in the Summary table. Also, as data is entered in the 'Employee Allocations' press 'Recalculate and Save' to update the summary totals.

1. Enter performance rating, merit increase, market/ep, compression and stipend/lump sum increase (if eligible) in the Employee Allocations section. You will be able to enter salary increases as either a dollar amount or % of eligible salary.
2. Click into the next field or tab over and the columns will auto-calculate.
3. To add comments or an attachment for an employee, click on the icon in the notes column.
***If entering Market/EP increase you must enter a reason in the notes column**

REMINDER: make sure to periodically click "Recalculate and Save" to save information that you have entered and to recalculate the summary table at the top. This also allows you to save and return at a later time.

The screenshot shows a detailed table with columns for Employee #, Position, Time in Grade, Previous Rating, Proposed Rating, Merit Eligible Salary, Current Comparison, Merit %, Merit \$, Proposed Annual Merit \$, Market/EP %, and Market/EP \$. Three cells are circled in red: the 'Proposed Rating' dropdown for the first row, the 'Merit %' and 'Merit \$' cells for the first row, and the 'Market/EP %' and 'Market/EP \$' cells for the first row.

NOTE: You can sort the data on the view by clicking the column headings.

4. Once your worksheet is completed, save and click 'Finish'. This will mark the task complete and you can now submit to the next level for approval.

CWB Reporting

Compensation Workbench reporting is available to download employee CWB saved data input (in real time) and additional employee information that is not included in the CWB worksheet view. This is provided to managers as a way to do additional analysis during the merit planning cycle outside of the CWB tool.

1. In the upper right-hand corner, click on "Home".



2. Navigate to your CWB responsibility or RIT Supervisor Self Serve.
3. Under 'Manager Self Service and Reporting: Reports (EIS)' select the CWB report you would like download.
4. On the 'Report Submit' page, click submit to receive all eligible employees within your security view or enter additional parameters to narrow your report to specific groups.

Report Submit :
Module **Human Resources** Instance
Responsibility **RIT CWB KGCOE** Business Group
* Indicates required field

CWB Faculty

* As of Date: 10-Mar-2016

Organization Name
Location Name
Job Name
Position Name
Employee Full Name
Payroll Name
Supervisor Name
Employee Number
People Type

[Submit](#) [Modify Report](#) [Clear](#) [Add to Parameter List](#)

Outputs: CWB Faculty

[Resubmit](#) [Refresh](#)

5. Click on 'Excel' in the outputs container.

Process ID **22839**
Request ID **14539245**
Report Name **CWB Faculty**
Rows Retrieved **112**
Status **Completed**
Start Time **10-MAR-2016 10:22:46**
End Time **10-MAR-2016 10:23:00**
Business Group **Rochester Institute of Technology**
Security Group **Standard**
Parameters **As of Date=10-MAR-2016**
Submitted By **AGDCTO**
Distribution Details **Not Distributed**

Outputs

- [Excel](#)
- [Pivot Excel](#)
- [CSV](#)

[Resubmit](#) [Refresh](#)

IV – Approve Your Direct Managers

If CWB access is granted to all level managers in your organization, this task allows a manager to approve or reject the work of direct reporting managers after the reporting manager has submitted for approval. The manager can do the following on this task:

- View status of each direct reporting manager.
- Review summary spending for manager’s team.
- View Details of how the manager’s team allocated rewards to each employee.
- Compare summary spending against other direct reporting managers.
- Approve or Reject manager work.

In Compensation Workbench Home, navigate to the ‘Approve Your Direct Managers’ task. Under the ‘Go to Task’ column, click the icon.

Compensation Workbench Home

Checklist: Crane, Thomas

Expand All | Collapse All

Task	Access	Last Updated	Status	Go To Task
All Tasks				
Faculty Annual Salary Review (Jul-15 - Jun-16)				
Assign Performance Rating & Allocate Merit Pool	Full Access	09-Mar-2016	✓	
Approve Your Direct Managers	Full Access	09-Mar-2016		
Submit to Next Level Approver	Full Access			

Switch To Another Manager

To perform tasks as a different manager, select from the Switch To list and click the Go button.

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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.	

Navigate to the ‘Review and Approve’ icon to view a summary of the manager’s spending and to compare managers.

Approval Overview

Manager	Submit Status	Approval Status	Manager Access	Due Date	Review and Approve
Kim Greylek	Not Submitted		Full Access	15-Jul-2016	
Holden March	Submitted (09-MAR-2016)		Read Only	15-Jul-2016	

You can view the summary totals, of the manager’s entire team, for Merit Pool. You can also navigate directly to the managers worksheet to see how each employee was compensated by pressing the ‘View Details’ button. You can change manager by selecting a manager from the ‘Jump to Manager’ drop down and can compare manager total budget and spending in order to make an approval decision.

Finally, you can approve or reject the work of a direct reporting manager.

Manager Review

Manager Name **Holden March** Submit Status **Submitted (10-MAR-2016)** **Cancel** **Approve** **Reject**

Access **Read Only** Approval Status

Due Date **15-Jul-2016**

Jump to Manager **Holden March** **Go**

Compensation Summary

Currency **USD - US Dollar (Corporate Currency)** **View Details** **Compare Against My Other Managers**

Merit Pool (All position funding types)

Eligible Employees	3
Employees Receiving	3
% Receiving	100 %
Total Eligible Salaries	183,167.00 USD
Budget	4,579.18 USD
Budget as % of Total Eligible Salaries	2.5 %
Total Allocated	4,579.17 USD
Total Allocated as % of Total Eligible Salaries	2.5 %
Unused Budget	0.01 USD
Average Amount per Eligible Employee	1,526.39 USD

Performance Summary

Rating	# Employees	% of Total
1 - Staff - Unsatisfactory	0	0.00
2 - Staff - Inconsistent	0	0.00
3 - Staff - Proficient/Successful	0	0.00
4 - Staff - Highly Effective	0	0.00
5 - Staff - Exceptional	0	0.00
1 - Faculty - Unsatisfactory	0	0.00
2 - Faculty - Does Not Meet Expectations	1	33.33
3 - Faculty - Meets Expectations	1	33.33
4 - Faculty - Exceeds Expectations	0	0.00
5 - Faculty - Outstanding	1	33.33
No Rating - Currently on Leave	0	0.00
No Rating - New	0	0.00
No Rating - Retiring/Leaving before July 1	0	0.00
No Rating	0	0.00
Total	3	100.00

The ‘Compare Against My Other Managers’ button allows you to view summary spending across direct reporting managers.

Compare Against Other Managers

Currency **USD - US Dollar (Corporate Currency)**

Faculty Annual Salary Review - Merit Pool (All position funding types)

Manager	Employees Eligible	Employees Receiving	% Receiving	Eligible Salaries	Budget Budget %	Total Allocated Units	% of Eligible Salaries	Available	Average Allocation
March, Holden	3	3	100	183,167.00	4,579.18 2.5	4,579.17 USD	2.5	0.01	1,526.39
Voight, Hank	6	0	0	551,300.00	13,782.50 2.5	USD		13,782.50	

V – Submit to Next Level Approver

NOTE: STOP HERE IF YOU ARE WORKING ON BEHALF OF A DIRECTOR/DEAN OF AN ORGANIZATION!

1. Log out of Oracle.
2. Have Director/Dean log into their Oracle account and access Compensation Workbench by going to: RIT Supervisor Self Serve -> Manager Salary Planning -> Compensation Workbench
3. Follow 'Submit to Next Level Approver' instructions below.

This task allows a manager to submit the work of the entire team up to the next level manager for approval. The manager can do the following on this task:

- View summary spending for manager's team.
- View Details of how the manager's team allocated rewards to each employee.
- View next level manager.
- Submit for Approval

Compensation Workbench Home

Checklist: Crane, Thomas

[Expand All](#) | [Collapse All](#)

Task	Access	Last Updated	Status	Go To Task
<input checked="" type="checkbox"/> All Tasks				
<input checked="" type="checkbox"/> Faculty Annual Salary Review (Jul-15 - Jun-16)				
Assign Performance Rating & Allocate Merit Pool	Full Access	09-Mar-2016	✓	
Approve Your Direct Managers	Full Access	09-Mar-2016	⚠	
Submit to Next Level Approver	Full Access		■	

Switch To Another Manager

To perform tasks as a different manager, select from the Switch To list and click the Go button.

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Switch To:

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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.	

Note: Once the manager submits for approval, the entire team becomes 'Read Only'. The submitting manager can 'Recall' their work on this task, provided the approving manager has not already approved.

Submit to Next Level Approver

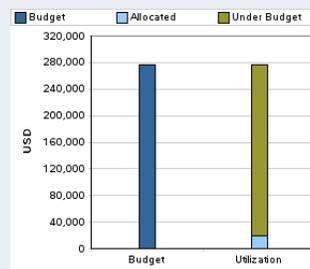
Submit Status: **Not Submitted** Approval Status: **Next Approver: Jeremy Haefner**

Access: Full Access Due Date: **15-Jul-2016**

Compensation Summary

Merit Pool (All position funding types)

Eligible Employees	108
Employees Receiving	6
% Receiving	5.5556 %
Total Eligible Salaries	11,093,736.36 USD
Budget	277,343.41 USD
Budget as % of Total Eligible Salaries	2.5 %
Total Allocated	19,670.67 USD
Total Allocated as % of Total Eligible Salaries	.18 %
Unused Budget	257,672.74 USD
Average Amount per Eligible Employee	3,278.45 USD



Performance Summary

Rating	# Employees	% of Total
1 - Staff - Unsatisfactory	0	0.00
2 - Staff - Inconsistent	0	0.00
3 - Staff - Proficient/Successful	0	0.00
4 - Staff - Highly Effective	0	0.00
5 - Staff - Exceptional	0	0.00
1 - Faculty - Unsatisfactory	0	0.00
2 - Faculty - Does Not Meet Expectations	2	1.85
3 - Faculty - Meets Expectations	3	2.78
4 - Faculty - Exceeds Expectations	0	0.00
5 - Faculty - Outstanding	2	1.85
No Rating - Currently on Leave	0	0.00
No Rating - New	0	0.00
No Rating - Retiring/Leaving before July 1	0	0.00
No Rating	101	93.52
Total	108	100.00

