RIT Compensation Workbench

FACULTY PERFORMANCE AND SALARY PLANNING CYCLE:
MANAGER USER GUIDE
MARCH 2016
I – Login & Access Compensation Workbench (CWB) ................................................................. 2

II – Switch to Another Manager ................................................................................................ 2

III - Change Manager Access (Optional) .................................................................................. 3

IV – Entering Performance Ratings and Merit Increases (Worksheet) ....................................... 6

Compensation Summary Information ....................................................................................... 7

Employee Allocations ................................................................................................................ 8

CWB Reporting .......................................................................................................................... 9

V – Approve Your Direct Managers ......................................................................................... 10

VI – Submit to Next Level Approver ....................................................................................... 12

VII - Resources .......................................................................................................................... 13
I – Login & Access Compensation Workbench (CWB)
(Please note: Internet Explorer is the preferred browser for Oracle Compensation Workbench)

Managers:

a. Log into Oracle
b. Navigate to RIT Supervisor Self Serve ⇒ Manager Salary Planning ⇒ Compensation Workbench

College Partners and Budget Officers:

a. Log into Oracle using your regular Oracle user name and password
b. In Navigator section, select “RIT CWB …”
c. Select “Compensation Workbench” under Manager Salary Planning

II – Switch to Another Manager

Managers can enter allocations for any employee who reports directly or indirectly to them, according to the supervisor 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 on behalf of another manager or as a super-user and do everything that the manager can do except view their notifications. If you don’t need to act as another manager, you may skip to Step III.

1. Go to Compensation Workbench Home:

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

3. Enter the employee name, number or email address of the employee who you want to change to and click ‘Go’.
4. Select the icon on the left of the screen next to the Manager you want to become. Notice that you are now acting as that Manager.

III - Change Manager Access (Optional)

The leader at the top of the supervisory hierarchy controls CWB access for the managers who report to him/her. The default setting is ‘No Access.’ To change access, you will switch to the highest level manager and then select managers within the hierarchy to change access.

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

2. Select the ‘Change Access’ link in the Options container
3. Select the option that allows you to view the current access and also change the access.

Select each manager that you want to change access for and select 'continue':
4. 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.

5. Select ‘Submit’ to change the manager’s access. This will change the manager’s access to CWB for this plan review period.
IV – 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 monetary awards. Managers can choose to work with ‘Direct Employees,’ subordinate manager teams or ‘All Employees’ within their supervisor hierarchy.

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

The worksheet allows you to do the following:
- View summary totals for Direct Reports or Team
- View detailed information for Employees, subordinate manager teams or ‘All Employees’
- Select ‘Recalculate and Save’ to update the summary table
- Return to the CWB Home page by selecting the ‘Compensation Workbench Home’ link in the upper left section of the page
- SAVE YOUR WORK AS YOU GO!!!!!!!
**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.

<table>
<thead>
<tr>
<th>Show Summary for Team</th>
<th>Merit Pool (All position funding types)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible Employees</td>
<td>10</td>
</tr>
<tr>
<td>Employees Receiving</td>
<td>3</td>
</tr>
<tr>
<td>% Receiving</td>
<td>30%</td>
</tr>
<tr>
<td>Total Eligible Salaries</td>
<td>1,480,584.00 USD</td>
</tr>
<tr>
<td>Merit Pool (All position funding types)</td>
<td>37,239.60 USD</td>
</tr>
<tr>
<td>Merit Pool (All position funding types) as % of Total Eligible Salaries</td>
<td>2.5 %</td>
</tr>
<tr>
<td>Total Allocated</td>
<td>15,091.50 USD</td>
</tr>
<tr>
<td>Unused Merit Pool (All position funding types)</td>
<td>22,148.10 USD</td>
</tr>
<tr>
<td>Average Allocated as % of Eligible Salaries</td>
<td>1.01 %</td>
</tr>
<tr>
<td>Total Merit Spend (All position funding types)</td>
<td>13,122.87 USD</td>
</tr>
<tr>
<td>Total Stipend Spend (All position funding types)</td>
<td>1,968.63 USD</td>
</tr>
</tbody>
</table>
**Employee Allocations**

The Employee Allocations section is where managers enter performance ratings and 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.

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’ select ‘Recalculate and Save’ to update the summary totals.

1. Enter performance rating, merit increase and stipend/lump sum increase (if eligible) in the Employee Allocations section. You will be able to enter the merit and stipend/lump sum increase 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.

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.

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

4. Once your worksheet is complete, save and click ‘Finish’ to return to the CWB Home page.
CWB Reporting

Compensation Workbench reports have been created to reflect ongoing changes to the CWB worksheet as they are saved. Additional employee and position information not displayed in the CWB worksheet view is also included in the report. This information 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 to 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.

5. Click on ‘Excel’ in the output:
V – Approve Your Direct Managers

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

Navigate to the ‘Review and Approve’ icon to view a summary of the manager’s spending and to compare with other managers.
You can view the summary Merit Pool totals of the manager’s entire team. You can also navigate directly to the manager’s worksheet to see how each employee was compensated by selecting the ‘View Details’ button. You can change managers 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. ‘Reject’ resets the record to Not Submitted status and allows the direct reporting manager to make changes and resubmit for approval.

The ‘Compare Against My Other Managers’ button allows you to view summary spending across direct reporting managers.
VI – Submit to Next Level Approver

**NOTE:** STOP HERE IF YOU ARE WORKING ON BEHALF OF THE DEAN OR THE SENIOR LEADER OF AN ORGANIZATION!

1. Log out of Oracle.
2. Have dean/senior leader log into their Oracle account and access Compensation Workbench by going to:
   - RIT Supervisor Self Serve -> Manager Salary Planning -> Compensation Workbench
3. Follow the ‘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 Merit Pool spending and Performance Ratings for the manager’s team
- View Details of how the manager’s team allocated rewards to each employee
- View the work of subordinate managers
- Submit for Approval

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.
After the dean/senior leader ‘Submits For Approval,’ the following message will appear. Selecting ‘Yes’ indicates you have completed your work.

**Information**

Are you sure you want to submit to the next level?
- This will prevent you and your subordinate managers from making further updates.
- This will approve any work-in-progress for your subordinate managers.
- This will notify your higher manager that you (and your team) are finished.

Select **Yes**

Next, Compensation Workbench asks if you want to send an email notification to the next higher manager in the hierarchy. **Select ‘**No, do not notify my approver’** and click ‘Submit’ which creates a record that the work has been approved and submitted by the dean/senior leader.

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**VII – Resources**

Please feel free to contact the following resources with any questions:

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