

Managing Individual Compensation Distributions with Oracle R12

Timothy Walsh
NorCal OAUG Training Day
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Program: Agenda



1. Introductions
2. ICD Overview
3. Implementing ICD
 - Planning
 - Building Blocks
 - Challenges
 - Assigning Awards Using ICD
 - Benefits
 - Lessons Learned
4. About Jade Global
5. Q & A

Introductions



Timothy Walsh

Consulting Director, Jade Global

timothy.walsh@jadeglobal.com

Raja Chanda

Senior Consultant, Jade Global

raja.chanda@jadeglobal.com

Oracle Individual Compensation Distribution (ICD)

- Provides managers with ability to assign one-time or recurring awards, bonuses, and allowances using SSHR
- Setup uses elements, which allow distribution through payroll, and the use of FastFormulas for calculations for maximum distribution amounts and/or commission calcs
- Security features ensure managers can distribute only to persons within their security profile and/or eligibility profiles
- Fully compliant with SOX for workflow approval processes
- Company branding through personalization

- What you can do with ICD
 - Periodic or Spot Bonuses
 - Commissions
 - Stock option grants
 - Service Awards
 - Sponsored allowances
 - Resettlement compensation
 - Severance Payments
 - Other periodic or recurring awards



- Planning your Compensation
 - Local or Global in design?
 - Who is eligible? (Eligibility Criteria)
 - What are the periods/frequency for each?
 - What currency, functional or local?
 - What are the limits, minimum/maximums?
 - What are the approvals required?

Implementing ICD



Oracle R12.0.x – ICD Plan Selection Screen

Individual Compensation Distribution[Original]: Compensation Type - Windows Internet Explorer

http://enault.usjadecorp.com:8010/OA_HTML/OA.jsp?_af=HR_PERSON_TREE_TCP_35b_r=8008_t=641220488&language_code=US&OCAPME=100562380APB=_CAPME&g

File Edit View Favorites Tools Help

Oracle My Support D-RVRS P-RVRS S-RVRS T-RVRS RVRS Email Utilities UManage OLD-USJade Email

Individual Compensation Distribution[Original]: Compe...

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Personalize Table Layout
Personalize "Summary Region"

Employee Name: Bailey, Sara
Organization Email Address: nobody@localhost
Manager: Tucker, William

Employee Number: 185
Department: Global Sales
Job: SVP200.Senior Vice President

Personalize "Compensation Type"

Personalize "Compensation Type Table"

Select Compensation Type

	Frequency	Status
<input type="radio"/> 401K W/D Funds Enrolled	Recurring	
<input type="radio"/> Employee Referral Bonus	Once	
<input type="radio"/> Sign On Relocation Package Basic Relocation	Once	
<input type="radio"/> Sign On Relocation Package Silver Relocation	Once	
<input type="radio"/> Sign On Relocation Package Gold Relocation	Once	
<input type="radio"/> Sign on Bonus	Once	
<input type="radio"/> United Way	Recurring	
<input type="radio"/> 401K Catch Up Plan	Recurring	
<input type="radio"/> Retention Bonus	Once	
<input type="radio"/> Severance	Once	
<input type="radio"/> Car Allowance	Recurring	
<input type="radio"/> Quarterly Bonus Plan	Once	

☒ TIP Distributions that are Pending Approval may not be changed.

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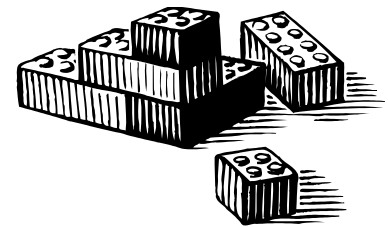
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Implementing ICD

Oracle R12.1.x – ICD Plan Selection Screen

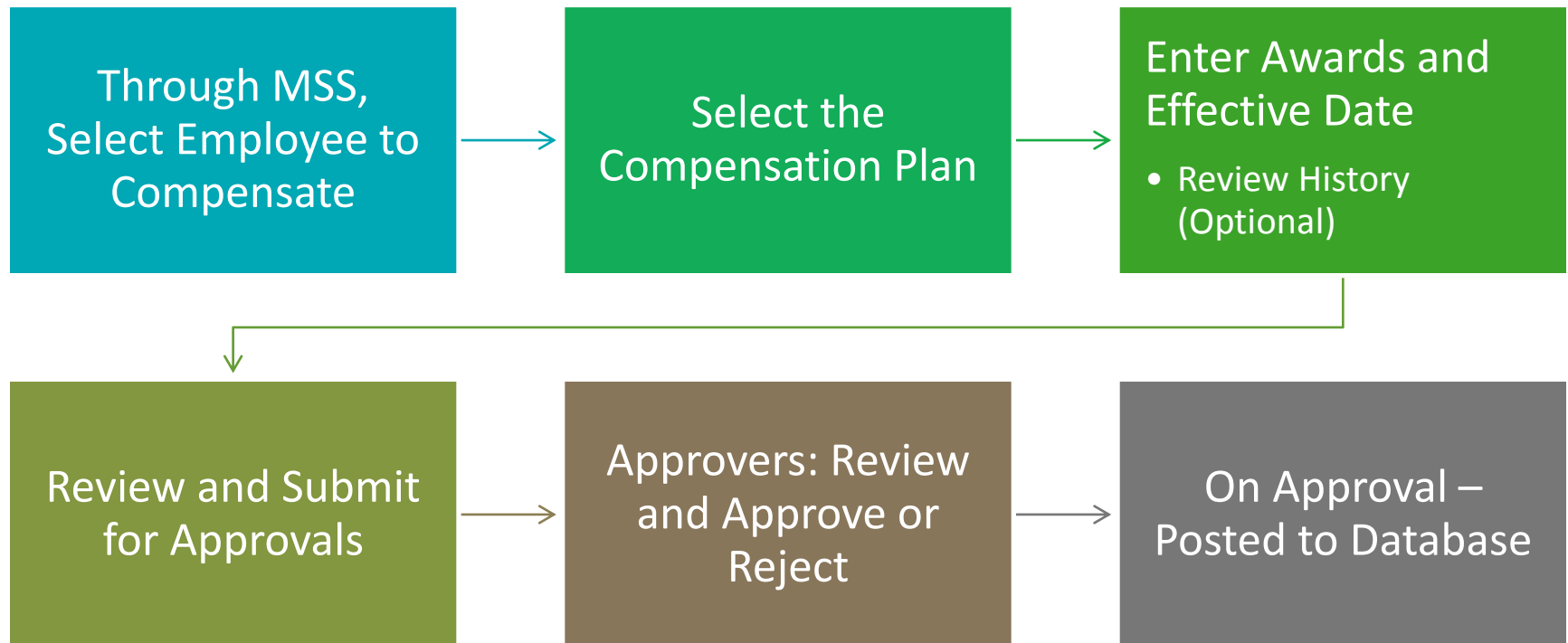
The screenshot shows the 'Individual Compensation Distribution: Details' screen in a Windows Internet Explorer browser. The address bar shows the URL: http://enault.najadecorp.com:8010/OA_HTML/OA.jsp?page=fjorade/apps/ben/selfservice/icd/for/webui/3cdDetailsPGSPersonId=127363cdAssignmentId=125363cdEffectiveDate. The page title is 'Individual Compensation Distribution: Details'. The browser's address bar shows the URL. The page content includes a 'Personalize "Summary Region"' section with fields for Employee Name (Bailey, Sara), Organization Email Address (nobody@localhost), Manager (Tucker, William), Employee Number (185), Department (Global Sales), and Job (SVP200.Senior Vice President). Below this is a 'Personalize Stack Layout: (DefStack)' section with a 'Select a Type' dropdown menu. The dropdown menu is open, showing options: 'Employee Referral', 'Special Recognition Award', 'Retention Bonus', 'Quality Bonus', and 'Employee Referral'. The 'Employee Referral' option is selected. The page also includes a 'Details' section with a 'Currency' field set to 'USD unless otherwise noted.' and a 'Personalize' button. The footer contains links for 'About this Page', 'Privacy Statement', 'Diagnostics', 'Home', 'Logout', 'Preferences', and 'Personalize Page'. The copyright notice is 'Copyright (c) 2008, Oracle. All rights reserved.'

- Setup Building Blocks
 - Define elements to hold each distribution
 - Define eligibility profiles
 - Define plan types
 - Define the plans
 - Define plan enrollment requirements
 - Define standard rates / historical rates
 - Enable SSHR menus / personalization's
 - AME for approvals



- Defining Approval Rules for each Plan
- Managing unrestricted Life Events
- No out of box reports
- Procedure for Closing unrestricted Life Events in different environments (with standard benefits, with Advanced Benefits, without either)

Assigning Awards Using ICD



- Distributing compensation management to line managers
- Manager's have better visibility into how their employee's are compensation
- Better management/controls over approval processes
- Avoiding PAN processes (Go Paperless)
- Directly integrated with Oracle Payroll
- Data available for reporting, budgeting, costing

Lessons Learned



- If ICD life event is active during CWB open period then CWB plan will fail to close. (11i issue)
- For plan design or eligibility changes to take effect you must close all unrestricted life events with a status of started.
- Use plan design copy feature if your defining multiple ICD plans.
- Use plan export/import feature to migrate plans between instances.

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Q&A

For More Information



Global Headquarters

1731 Technology Drive, Suite 350
San Jose, CA 95110
877-JADE-4IT (523-3448)
<http://www.jadeglobal.com>

Boston Area Office

1900 West Park Drive, Suite# 280
Westborough, MA 01581
(508) 983-1457

Timothy Walsh

Consulting Director

timothy.walsh@jadeglobal.com

Jade Global - India

E-Space IT Park, A-3, 2nd Floor,
102 D/E, Wadgaon Sheri,
Pune-Nagar Road, Pune 411-014
Phone: 91-2066081500
VOIP: (408) 907-2730
(408) 834-8606

