

**Contents**

MONTHLY TIME AND ATTENDANCE – MANAGER ..... 2

    Log into SOARHR ..... 2

        Procedures for how to Log into SOARHR ..... 2

    Assign Employees to Managers..... 3

        Create a List of Active Employees ..... 3

        What to do When..... 5

    Approve Employees Leave Taken..... 7

        Verify Time is Entered, Approve the Leave Taken and Ensure all are Approved ..... 7

    View Manager’s Approval and Process Information..... 9

    Log out of SOARHR ..... 10

    Conclusion ..... 10

    Points to Remember ..... 11

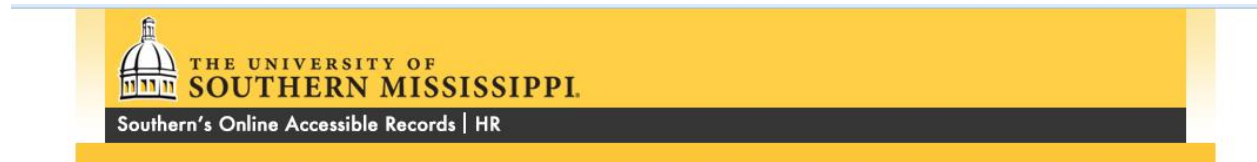
# MONTHLY TIME AND ATTENDANCE – MANAGER

## Log into SOARHR

### Procedures for how to Log into SOAR

To Log in:

- Simply start Web Browser (SOARHR performs best in Mozilla or Chrome)
- The web address is <https://www.soahr.usm.edu> or you may follow the path listed.
- From the Southern Miss Home Page (<http://www.usm.edu>) click on A – Z.
- Choose S from the Alphabet.
- Choose on SOAR – Southern’s Online Accessible Records.
- Choose SOARHR.
- SOARHR Login
- Enter your User ID and Password. Your user ID is the letter “W” plus your 6 or 8 digit Employee ID. Example: W123456 or W87654321



User ID   <input type="text"/>	Select a Language <a href="#">English</a>
Password <input type="password"/>	<a href="#">Password Help</a>
<input type="button" value="Sign In"/>	<a href="#">(CampusID)</a>

Click the  Button

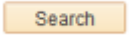
# Assign Employees to Managers

## Create a List of Active Employees


This process is only used for managers of monthly paid employees who are responsible for reporting personal (vacation) and/or sick time taken each month. For employees to have access to input their leave taken, the manager must first assign employees to their Active Employee List. This is done by navigating to the following path once you have logged into SOAR.



**Self Service > USM HR/Payroll Self Service > Assign Employees to Managers**

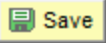
The screenshot shows the Oracle HR Self Service interface. At the top, there is a navigation breadcrumb: Favorites > Main Menu > Self Service > USM HR/Payroll Self Service > Assign Employee to Managers. Below this is the Oracle logo. The main heading is "Assign Employee to Managers". A sub-heading reads: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a search form with a "Find an Existing Value" button. Underneath is a "Search Criteria" section with two input fields: "Manager ID" with a dropdown set to "begins with" and a text box containing "123645", and "Name" with a dropdown set to "begins with" and an empty text box. There is a "Case Sensitive" checkbox which is unchecked. At the bottom of the form are buttons for "Search", "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria".


Make sure the Manager ID is correct. It should be the Manager who is adding an employee for approval. Click  .

The screenshot shows the Oracle HR Self Service interface. At the top, there is a navigation bar with the following items: Favorites, Main Menu, Self Service, USM HR/Payroll Self Service, and Assign Employee to Managers. Below the navigation bar is the Oracle logo. The main content area is titled "List of Employees" and includes a "Delete Manager" button. There is a "Manager ID" field with a dropdown menu currently showing "College of Business GP" and "315000". Below this is a search bar for "Employees" with a "Find" button and navigation controls for "First", "1 of 1", and "Last". There is also an "Empl ID" search field with a magnifying glass icon. At the bottom of the interface, there are several buttons: "Save", "Return to Search", "Previous in List", "Next in List", and "Notify".

The Manager ID will be populated. If no employees are assigned to the manager’s list, simply enter the Empl ID in which the manager will approve time in the field .

To enter additional employees, press the button with the plus sign  to add another row. Continue adding one row for each monthly employee. To delete a row, click on the minus  sign.

Click on the Save button  before exiting this page or the data will be lost. Once completed, the employees that were entered will have access to enter their leave taken.

Note: A search can be performed if the Empl ID is not known by clicking the magnifying glass  icon.

Employees trying to enter their leave time will receive an error if the manager has not added them to the Active Employee List. Always make sure to save the data entry.

## What to do When.....

You have entered an employee id number and get this message:

-----

Message from webpage

-----

Contact "Manager's Name & Empl ID" to have your employee's empl id removed from his/her list or contact Human Resources

The PeopleCode program executed an Error statement, which has produced this message.

-----

OK

-----

The message is telling you that you have entered an employee ID# that is already assigned to another manager.

1. Verify the correct employee ID number has been entered
2. If correct, contact the manager indicated in the message to coordinate whose list of Active employees the employee should be placed.
3. If the manager is no longer at USM, contact Human Resources (HR) and ask for the employee to be removed from the indicated manager's list.

You have entered an employee ID number and you get the message below:

-----

Message from webpage

-----

INELIGIBLE HOURLY LEAVE PLAN

If you think the leave plan should not be hourly, contact HR.

The PeopleCode program executed an Error statement, which has produced this message.

-----

OK

---

The message is telling you that you have entered an employee ID number of someone who is not currently enrolled in a monthly leave plan.

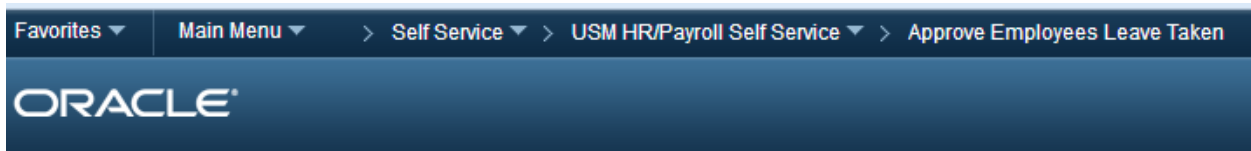
1. Verify the correct employee ID number has been entered.
2. If correct, contact HR to research why the employee is not enrolled in the leave plans. If you suspect it is merely a timing issue (i.e., employee recently moved from bi-weekly to monthly, and it is possible that the leave plan has not been changed in HR yet), then try again later, before contacting HR.

# Approve Employees Leave Taken

## Verify Time is Entered, Approve the Leave Taken and Ensure all are Approved

This section covers how to verify that each employee has entered time, approve the time that each employee has entered and check to make sure all employees time has been approved. Navigate to the “Approve Employees Leave Taken” search page by using the following path:

**Self Service > USM HR/Payroll Self Service > Approve Leave Taken**



### Approve Employees Leave Taken

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with

Manager ID begins with

Calendar Year =

Month begins with

Approved =

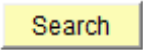
Time Entered =

Search Clear Basic Search Save Search Criteria

### Search Results

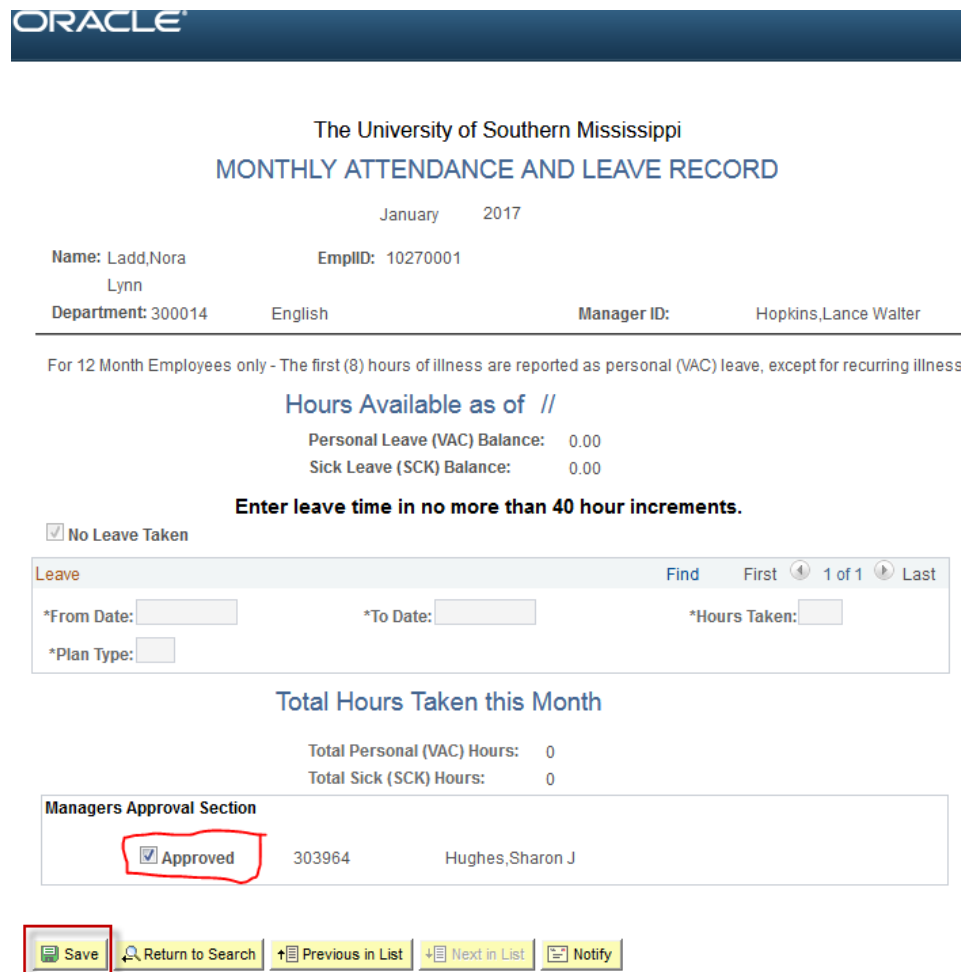
View All First 1-3 of 3 Last

Empl ID	Manager ID	Month	Calendar Year	Approved	Time Entered	Name
10270001	086827	01	2017	Yes	Yes	Nora Ladd
10270001	086827	02	2017	No	Yes	Nora Ladd
10270001	086827	03	2017	No	Yes	Nora Ladd

Use the Calendar Year drop down to select the current year and click on the search  button to view the employee list. More search options can be used to narrow down the amount of data that is retrieved if desired. This view indicates the status of approval and whether time was entered.

In the example above, time has been entered for January, February, and March. January has also been approved by the Manager. The employee must enter time before it can be approved. If time has not been entered for the month the column headed time entered will have "No" listed.

The manager selects the month to review or approve by choosing the appropriate hyperlink for that month. To approve, the manager clicks on the Approved button and clicks Save.



The screenshot shows the Oracle HCM interface for 'The University of Southern Mississippi'. The main heading is 'MONTHLY ATTENDANCE AND LEAVE RECORD' for January 2017. Employee details include Name: Ladd, Nora Lynn; EmplID: 10270001; Department: 300014 English; Manager ID: Hopkins, Lance Walter. A note states: 'For 12 Month Employees only - The first (8) hours of illness are reported as personal (VAC) leave, except for recurring illness.' The 'Hours Available as of' section shows Personal Leave (VAC) Balance: 0.00 and Sick Leave (SCK) Balance: 0.00. A checkbox for 'No Leave Taken' is checked. The 'Leave' table has one entry with \*From Date, \*To Date, and \*Hours Taken fields. The 'Total Hours Taken this Month' section shows Total Personal (VAC) Hours: 0 and Total Sick (SCK) Hours: 0. The 'Managers Approval Section' shows a table with a red box around the 'Approved' checkbox, the manager ID 303964, and the name Hughes, Sharon J. At the bottom, a 'Save' button is highlighted with a red box, along with 'Return to Search', 'Previous in List', 'Next in List', and 'Notify' buttons.



## View Manager's Approval and Process Information

Self Service>USM Self Service>Approve Employees Leave Taken

To verify that the manager has approved the time the employee has entered, the employee can go back to the month they wish to verify and look at the bottom of the page.

If the manager has approved time, the employee can no longer update time for that month, unless the manager un-checks the approval box and saves that change.

<b>Managers Approval Section</b>	
<input type="checkbox"/> Approved	
<b>Process Information</b>	
<input type="checkbox"/> Processed	Process Date:

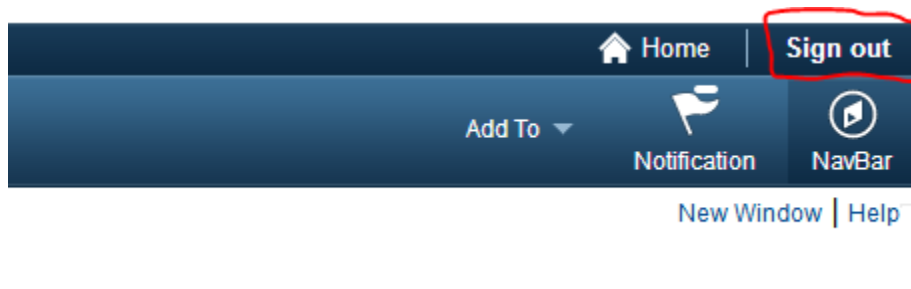
If the manager has not approved the leave taken in a timely manner the time will not get processed. This can also be checked on the same page.

The Process Information will indicate when the payroll process has been run, thereby locking the time entered so that neither employee nor manager can change the data. As previously mentioned, any correction to processed data must be requested through Human Resources.

<b>Managers Approval Section</b>	
<input checked="" type="checkbox"/> Approved	
<b>Process Information</b>	
<input checked="" type="checkbox"/> Processed	Process Date: 09/19/2012

## Log out of SOAR

As a security precaution, always log out of SOAR so your session will end. Closing the Internet web browser does not log you out of SOAR, it merely closes the web browser. To log out correctly, use the “Sign Out” **Sign out** hyperlink at the top right of the page.



## Conclusion

The manager is responsible for approving their employee's time in the system. Before the employee can enter time, the manager must have entered the employee in their Active Employee list, otherwise the employee will receive an error message indicating that they have not been assigned to a manager.

After the manager has approved leave time, the employee cannot change that information without the manager un-checking the approved box  **Approved**. The time may be viewed.

Once the automatic process is run in Payroll that posts leave earned and taken, neither manager nor employee will have access to make changes. All requests for changes will need to be made through Human Resources.

## Points to Remember

- This process is used to report leave **taken** only
- Only the employee logged into SOAR can enter time for himself/herself – No one can enter leave taken for another employee, not even the employee’s manager.
- When assigning employees to manager, no need to enter the “W” before the 6 digit employee ID.
- Good idea to check the name that appears after typing the employee ID number, when assigning employees to manager to verify correctness of the ID number.
- REMEMBER 8 hour Vacation rule for each illness incident (first 8 hours of leave taken due to illness is classified as Personal Leave (vacation) for non-reoccurring illness. After the first 8 hours, all other will be sick leave.)
- As a Manager, you have the responsibility to check the correctness of the monthly leave being submitted and approve or not in a timely manner.
- On Monthly Attendance and Leave Record panel, the calendar used in lookup will display the current month, not necessarily the month for which leave taken is being entered.
- Time should be entered on a weekly basis (normally Monday to Friday), NOT to exceed 40 hours leave taken in one week. This will give a better history of the actual days/dates an employee takes off.
- Leave taken will continue to be entered in full-hour increments.
- Employees should not click on the “No Leave Taken”  **No Leave Taken** box until the end of the month – how do they know on the 15<sup>th</sup> that they will not be out due to illness on the 28<sup>th</sup> day of the month.
- Once a month’s leave has been processed, any adjustments will need to be made through Human Resources – employee cannot create a second sheet for a month already submitted and processed.
- If you are a new Manager, Human Resources will need to set you up as a Manager to approve employee’s time. Contact Sharon Hughes in Human Resources, 266-4050. Once that process is complete then you will be able to assign employees to your active list.
- If you encounter problems assigning employees or approving time, send an email to Payroll@usm.edu.