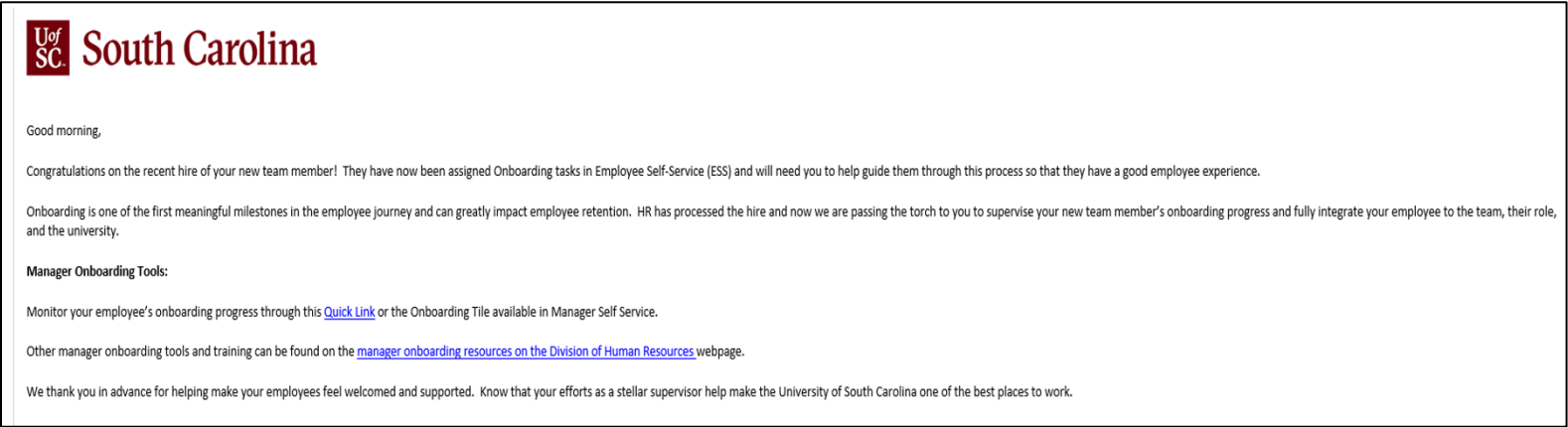




University of South Carolina - Division of Human Resources
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

How to view new employee onboarding summary and other job/personal information for your employees in HCM PeopleSoft:
 This job aid outlines the process for Managers to view certain information for their employees through Manager Self-Service in HCM PeopleSoft. Managers can view the onboarding summary for their new employees, view job information, and specific personal information.

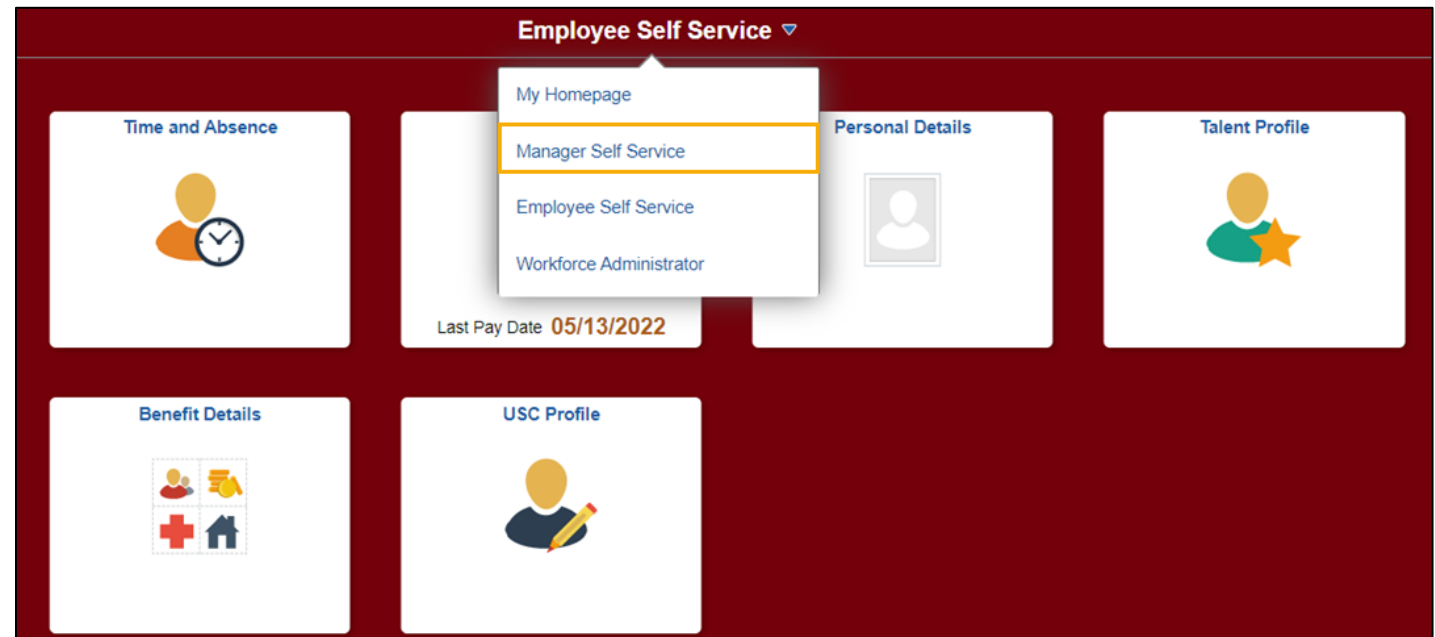
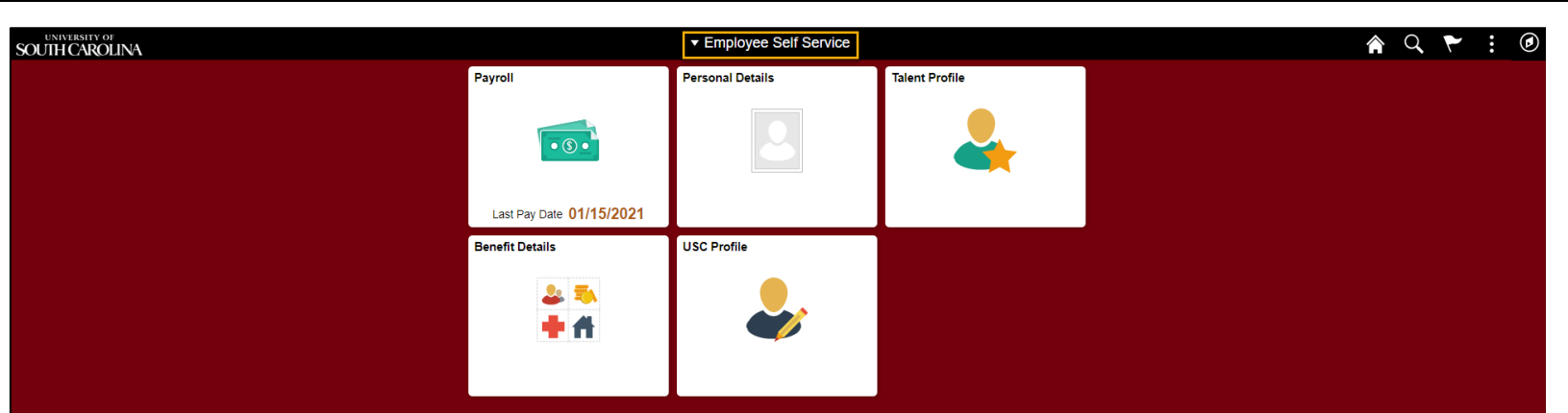
| Processing Steps | Screen Shots |
|---|---|
| <p>Onboarding Summary View</p> <p>Pre-step: The manager receives an automated email alerting them that their new employee has been assigned onboarding tasks in Employee Self-Service (ESS).</p> |  <p>The screenshot shows an email from the University of South Carolina. It begins with "Good morning," followed by a congratulatory message: "Congratulations on the recent hire of your new team member! They have now been assigned Onboarding tasks in Employee Self-Service (ESS) and will need you to help guide them through this process so that they have a good employee experience." The email explains that onboarding is a key milestone and that HR has passed the torch to the manager. It lists "Manager Onboarding Tools" and provides instructions: "Monitor your employee's onboarding progress through this Quick Link or the Onboarding Tile available in Manager Self Service." It also mentions that other resources are available on the "manager onboarding resources on the Division of Human Resources webpage." The email concludes with a thank you: "We thank you in advance for helping make your employees feel welcomed and supported. Know that your efforts as a stellar supervisor help make the University of South Carolina one of the best places to work."</p> |

University of South Carolina - Division of Human Resources

Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 1: On the main homepage, click the **Employee Self Service** drop-down menu button.

Step 2: Click the **Manager Self-Service** option.



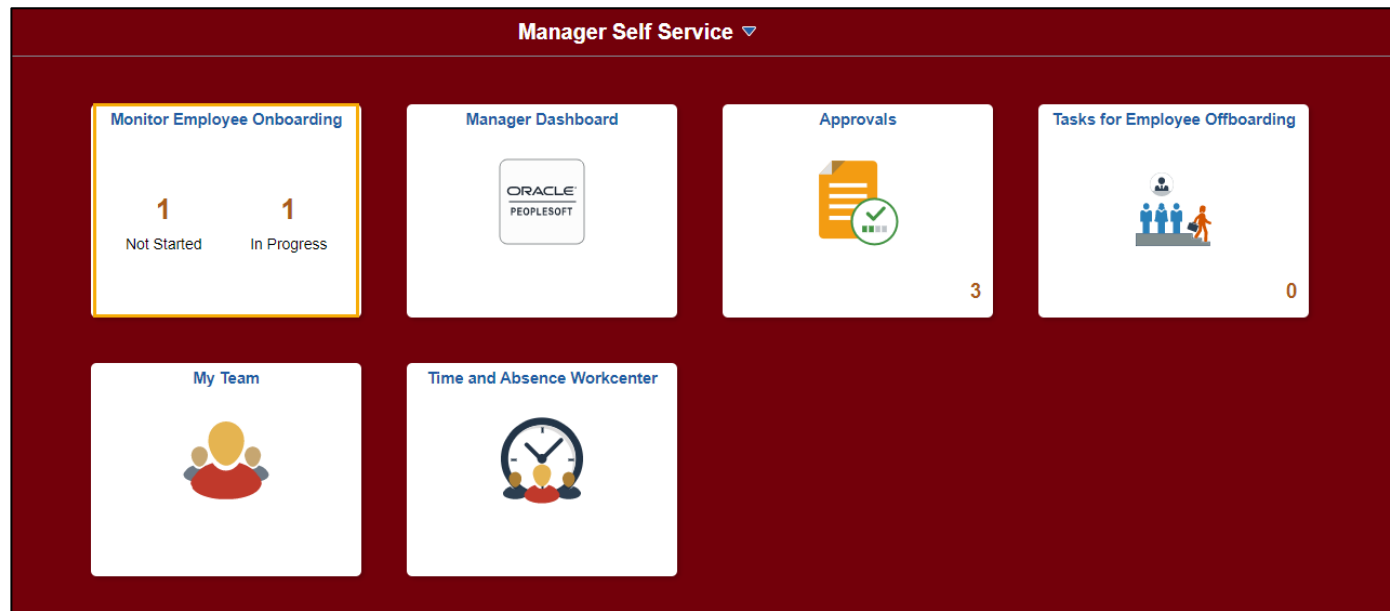
University of South Carolina - Division of Human Resources

Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 3: Click the **Monitor Employee Onboarding** tile to begin.

The **Manager Onboarding Status** provides a quick reference of the onboarding status for your new employees going back to a limit of 90 days. The manager Onboarding Checklist link takes you to HR's onboarding webpage which includes helpful information on onboarding and includes a checklist for managers.

Note: if you supervise both student employees and faculty/staff, all employee types will appear here.



Manager Self Service ▾

Monitor Employee Onboarding


1

Not Started


1

In Progress

Manager Dashboard




Approvals




3

Tasks for Employee Offboarding




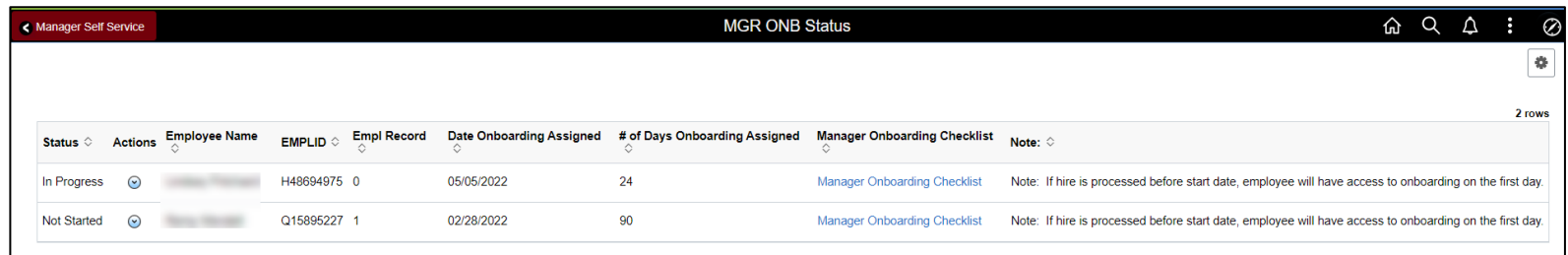
0

My Team



Time and Absence Workcenter





| Status | Actions | Employee Name | EMPLID | Empl Record | Date Onboarding Assigned | # of Days Onboarding Assigned | Manager Onboarding Checklist | Note |
|-------------|---------|---------------|-----------|-------------|--------------------------|-------------------------------|--|---|
| In Progress | | [REDACTED] | H48694975 | 0 | 05/05/2022 | 24 | Manager Onboarding Checklist | Note: If hire is processed before start date, employee will have access to onboarding on the first day. |
| Not Started | | [REDACTED] | Q15895227 | 1 | 02/28/2022 | 90 | Manager Onboarding Checklist | Note: If hire is processed before start date, employee will have access to onboarding on the first day. |

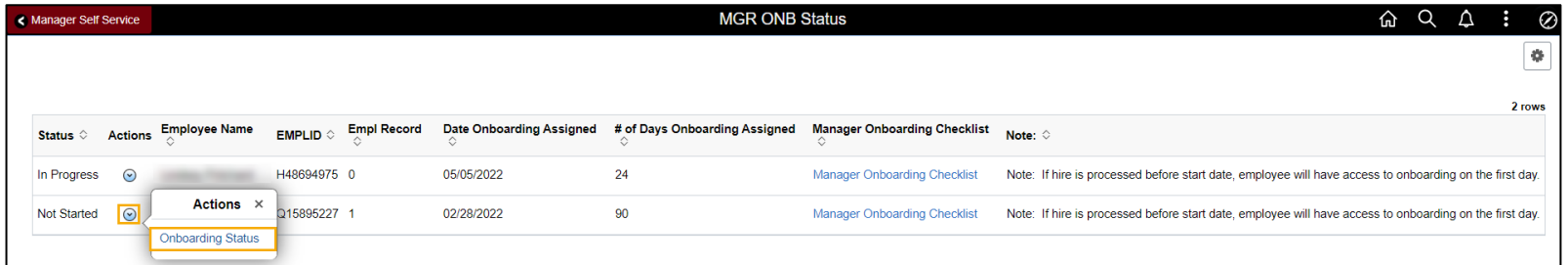
University of South Carolina - Division of Human Resources

Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

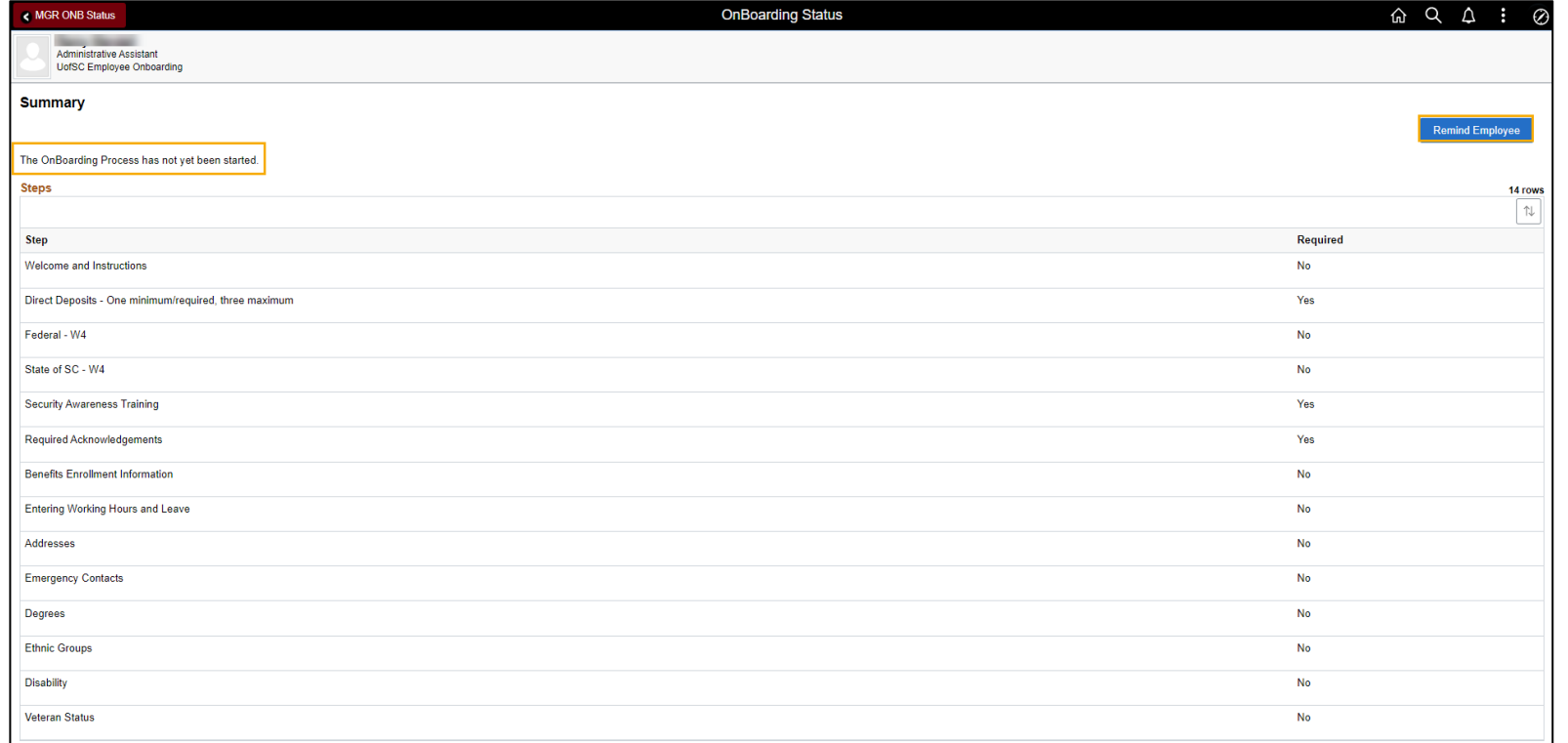
Step 4: Click the **Related Actions Menu** button and select **Onboarding Status**.

Selecting the Onboarding Status option opens the manager summary view of onboarding tasks for that employee. In this example (of staff/faculty onboarding) you can see that the employee has yet to begin their onboarding process.

As manager, you have the ability to remind your new employees to complete onboarding tasks directly in HCM. Click the **Remind Employee** button in the top right corner and the employee will receive an email reminder.



| Status | Actions | Employee Name | EMPLID | Empl Record | Date Onboarding Assigned | # of Days Onboarding Assigned | Manager Onboarding Checklist | Note |
|-------------|--|---------------|-----------|-------------|--------------------------|-------------------------------|--|---|
| In Progress | | [Redacted] | H48694975 | 0 | 05/05/2022 | 24 | Manager Onboarding Checklist | Note: If hire is processed before start date, employee will have access to onboarding on the first day. |
| Not Started | Actions Onboarding Status | [Redacted] | Q15895227 | 1 | 02/28/2022 | 90 | Manager Onboarding Checklist | Note: If hire is processed before start date, employee will have access to onboarding on the first day. |



Administrative Assistant
UofSC Employee Onboarding

Summary [Remind Employee](#)

The OnBoarding Process has not yet been started.

| Step | Required |
|---|----------|
| Welcome and Instructions | No |
| Direct Deposits - One minimum/required, three maximum | Yes |
| Federal - W4 | No |
| State of SC - W4 | No |
| Security Awareness Training | Yes |
| Required Acknowledgements | Yes |
| Benefits Enrollment Information | No |
| Entering Working Hours and Leave | No |
| Addresses | No |
| Emergency Contacts | No |
| Degrees | No |
| Ethnic Groups | No |
| Disability | No |
| Veteran Status | No |

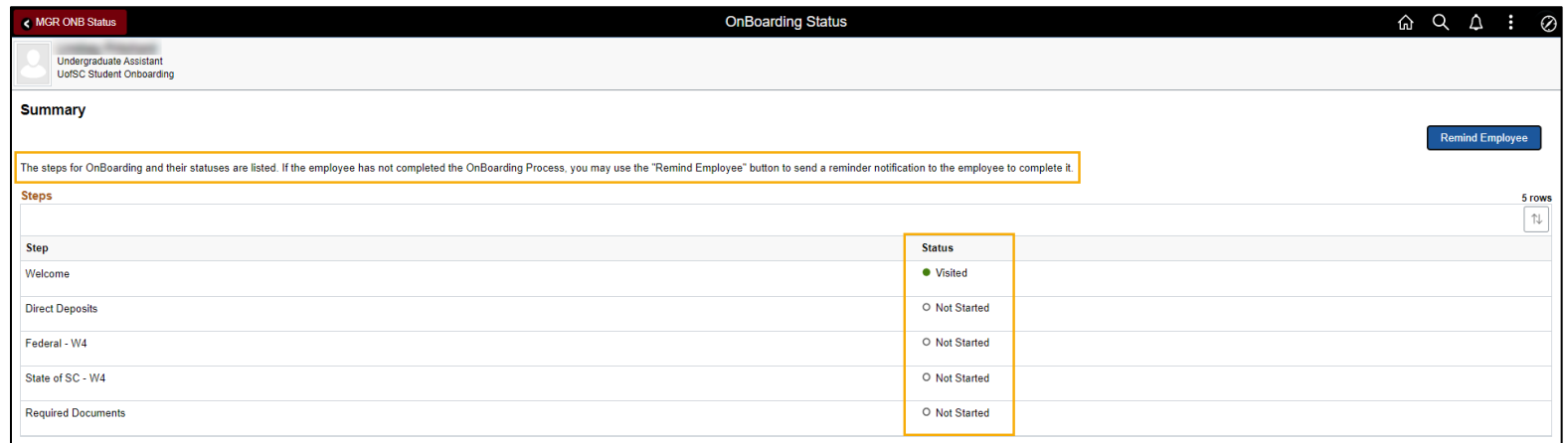
University of South Carolina - Division of Human Resources

Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

In this example (of student employee onboarding) you can see under the **Status** column that the student employee has visited the onboarding page but hasn't yet completed any tasks.

For all employee types you have the option to **Remind Employee** to complete their onboarding tasks.

Note once the employee has completed all onboarding tasks, the **Remind Employee** button will no longer appear.



OnBoarding Status

Undergraduate Assistant
UofSC Student Onboarding

Summary Remind Employee

The steps for OnBoarding and their statuses are listed. If the employee has not completed the OnBoarding Process, you may use the "Remind Employee" button to send a reminder notification to the employee to complete it.

| Step | Status |
|--------------------|---------------|
| Welcome | ● Visited |
| Direct Deposits | ○ Not Started |
| Federal - W4 | ○ Not Started |
| State of SC - W4 | ○ Not Started |
| Required Documents | ○ Not Started |

University of South Carolina - Division of Human Resources

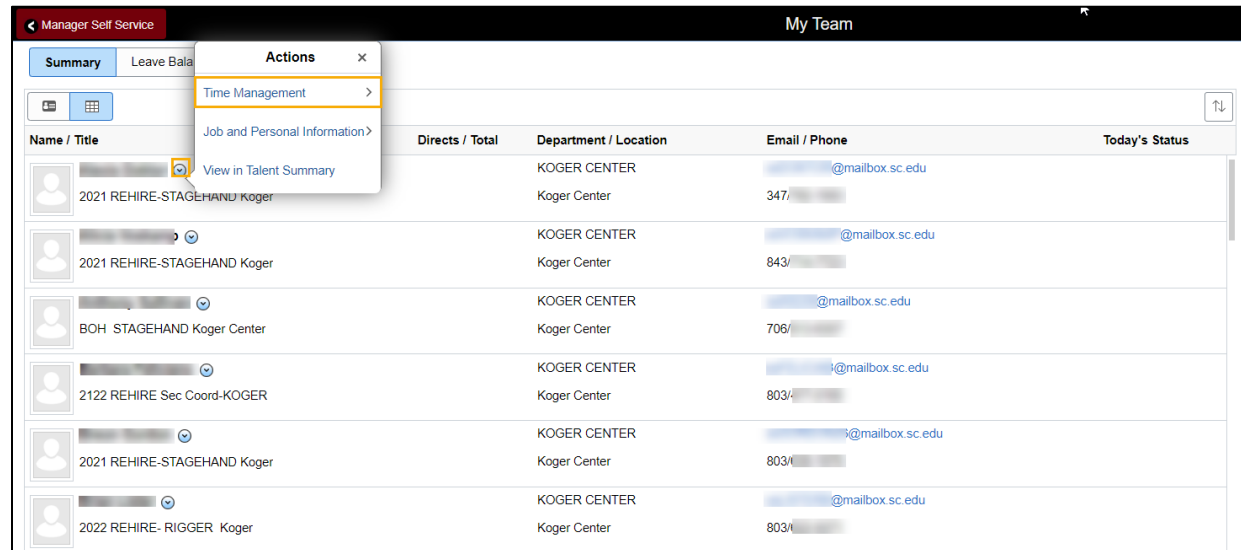
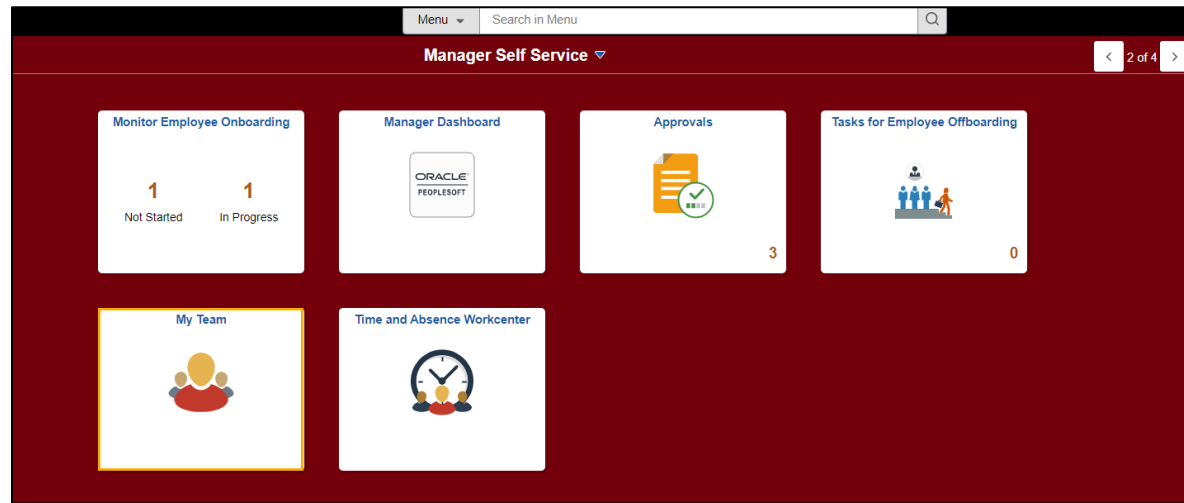
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

My Team view of Time Management, Job and Personal Information, and Talent Summary

Navigate back to **Manager Self Service** and select the **My Team** tile.

The **My Team** tile opens a roster of your active employees. You can quickly reference their internal title, direct reports if applicable, department/location, and their email address and phone number.

Step 1: Click the **Related Action Menu** button and select the **Time Management** option.



University of South Carolina - Division of Human Resources

Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

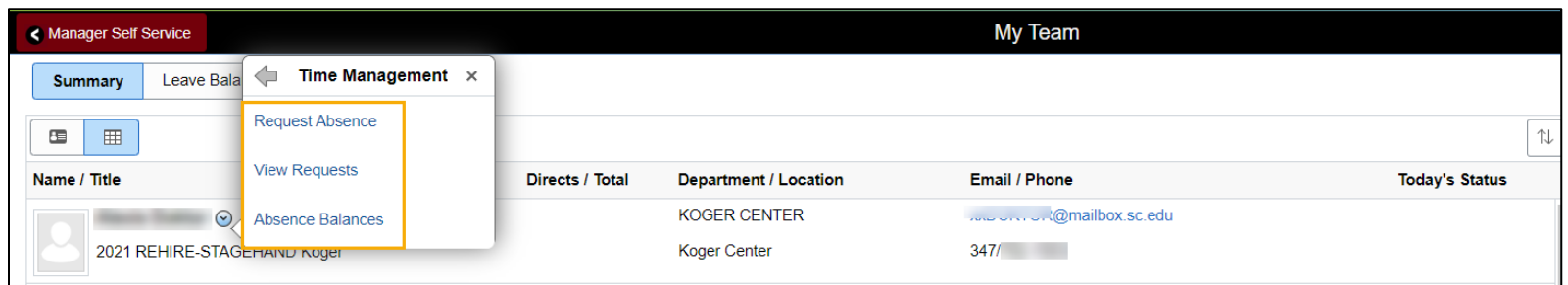
Clicking the **Time Management** option in the previous step allows you to take the below three actions on that employee:

1. Request an Absence
2. View Absence Requests
3. View Absence Balances

Additional information, resources, and job aids for managing employee time and absence can be found on the [Time and Absence implementation webpage](#).

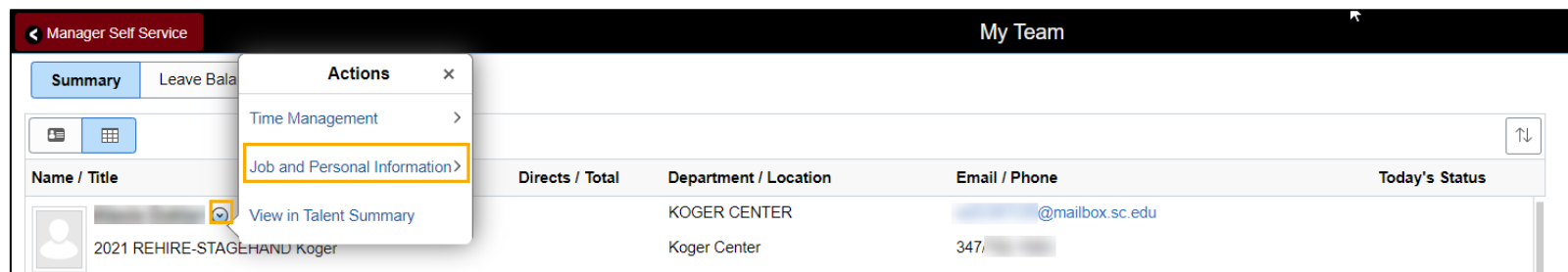
Step 2: From the **Related Actions Menu** select the **Job and Personal Information** option.

Step 3: Click the **View Employee Personal Info** link.



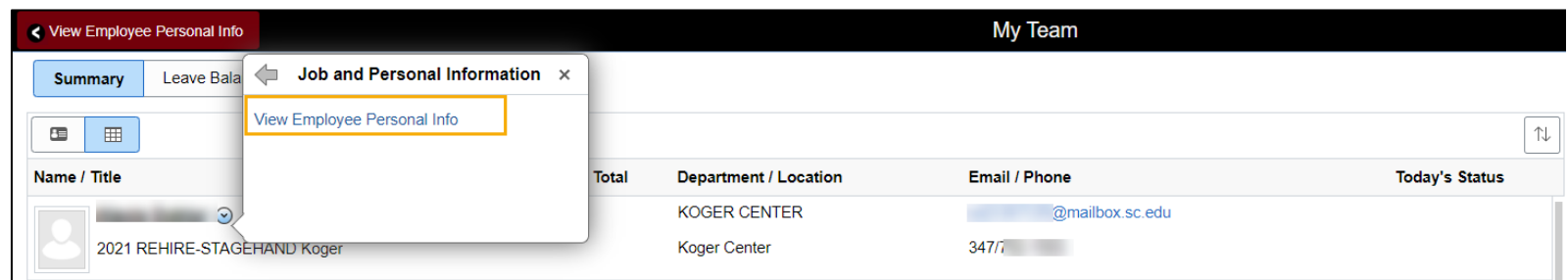
The screenshot shows the 'Manager Self Service' interface for 'My Team'. A dropdown menu titled 'Time Management' is open over the employee record for '2021 REHIRE-STAGEHAND Koger'. The menu options are 'Request Absence', 'View Requests', and 'Absence Balances'. The employee record table below shows the following data:

| Name / Title | Directs / Total | Department / Location | Email / Phone | Today's Status |
|-----------------------------|-----------------|------------------------------|-------------------------|----------------|
| 2021 REHIRE-STAGEHAND Koger | | KOGER CENTER Koger Center | @mailbox.sc.edu 347/ | |



The screenshot shows the 'Manager Self Service' interface for 'My Team'. A dropdown menu titled 'Actions' is open over the employee record for '2021 REHIRE-STAGEHAND Koger'. The menu options are 'Time Management' and 'Job and Personal Information'. The 'Job and Personal Information' option is highlighted. The employee record table below shows the following data:

| Name / Title | Directs / Total | Department / Location | Email / Phone | Today's Status |
|-----------------------------|-----------------|------------------------------|-------------------------|----------------|
| 2021 REHIRE-STAGEHAND Koger | | KOGER CENTER Koger Center | @mailbox.sc.edu 347/ | |



The screenshot shows the 'Manager Self Service' interface for 'My Team'. A dropdown menu titled 'Job and Personal Information' is open over the employee record for '2021 REHIRE-STAGEHAND Koger'. The menu option 'View Employee Personal Info' is highlighted. The employee record table below shows the following data:

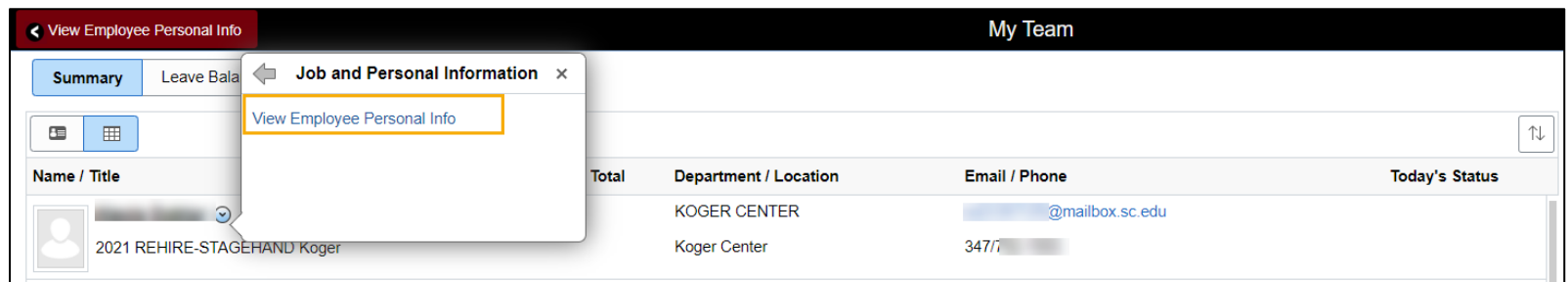
| Name / Title | Total | Department / Location | Email / Phone | Today's Status |
|-----------------------------|-------|------------------------------|-------------------------|----------------|
| 2021 REHIRE-STAGEHAND Koger | | KOGER CENTER Koger Center | @mailbox.sc.edu 347/ | |

University of South Carolina - Division of Human Resources
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
Personal information in HCM

Upon clicking the View Employee Information link in the previous step you are brought to the Employee Information summary page. This page provides you with an overview of the employee's position and employment information as well as options to view their emergency contacts and their month/day of birth.

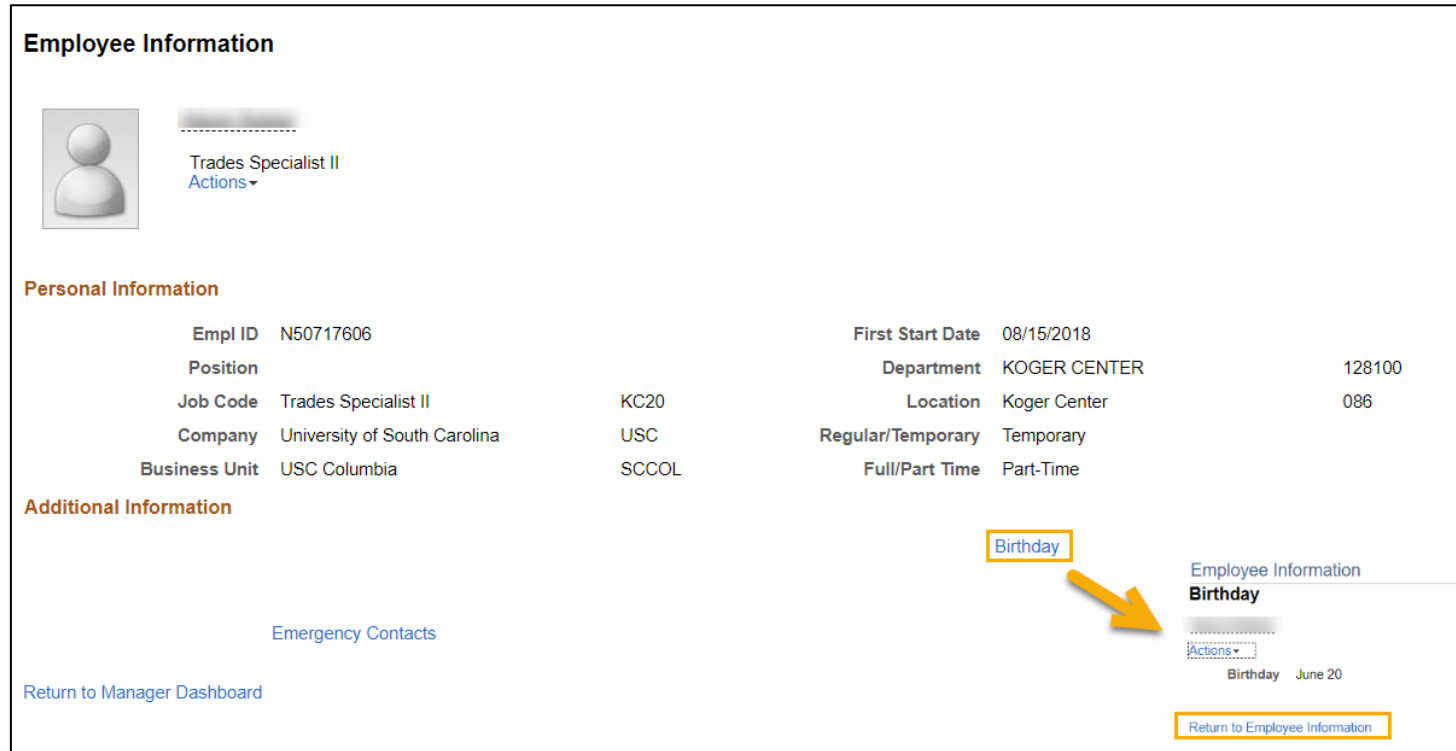
Step 4: Click the **Birthday** link to view the employee's birth month/day.

Step 5: Click **Return to Employee Information** to review **Emergency Contact information** for the employee.



The screenshot shows a modal window titled "View Employee Personal Info" with a close button (x). Inside the modal, there is a "View Employee Personal Info" link highlighted with a yellow box. The background shows a "My Team" page with a table of employee information.

| Total | Department / Location | Email / Phone | Today's Status |
|-------|-----------------------|-----------------|----------------|
| | KOGER CENTER | @mailbox.sc.edu | |
| | Koger Center | 347/7 | |



The screenshot shows the "Employee Information" page for a Trades Specialist II. It includes a profile picture, title, and an "Actions" dropdown. Below this is the "Personal Information" section with a grid of details. At the bottom, there is an "Additional Information" section with a "Birthday" link highlighted in a yellow box. A yellow arrow points from this link to the "Employee Information Birthday" section, which shows "Birthday June 20" and a "Return to Employee Information" link highlighted in a yellow box.

Employee Information

Trades Specialist II
Actions

Personal Information

| | | | |
|---------------|----------------------------------|-------------------|---------------------|
| Empl ID | N50717606 | First Start Date | 08/15/2018 |
| Position | | Department | KOGER CENTER 128100 |
| Job Code | Trades Specialist II KC20 | Location | Koger Center 086 |
| Company | University of South Carolina USC | Regular/Temporary | Temporary |
| Business Unit | USC Columbia SCCOL | Full/Part Time | Part-Time |

Additional Information

Emergency Contacts

Return to Manager Dashboard

Employee Information
Birthday
Actions
Birthday June 20
Return to Employee Information

University of South Carolina - Division of Human Resources
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
Personal information in HCM

Step 6: Click **Emergency Contacts** link.

Step 7: From the Emergency Contacts page, click the **Contact Name** link that you would like to view.

Employee Information



Trades Specialist II

[Actions](#)

Personal Information

| | | | |
|----------------------|----------------------------------|--------------------------|---------------------|
| Empl ID | N50717606 | First Start Date | 08/15/2018 |
| Position | | Department | KOGER CENTER 128100 |
| Job Code | Trades Specialist II KC20 | Location | Koger Center 086 |
| Company | University of South Carolina USC | Regular/Temporary | Temporary |
| Business Unit | USC Columbia SCCOL | Full/Part Time | Part-Time |

Additional Information

[Birthday](#)

[Emergency Contacts](#)

Employee Information

Emergency Contacts

[Actions](#)

| Contact Name | Relationship to Employee | Primary Contact |
|---------------------|--------------------------|-------------------------------------|
| Ken | Other | <input checked="" type="checkbox"/> |

University of South Carolina - Division of Human Resources
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
Personal information in HCM

View the employee's Emergency Contact detail including their name, relationship to employee, address (if provided) and telephone number (if provided).

Step 8: Click the **Return to Emergency Contacts** link to go back to the previous page.

Navigate back to **My Team**.

[Emergency Contacts](#)

Emergency Contact Detail

Address and Telephone

Contact Name Ken [redacted]
 Relationship to Employee Other

- Contact has the same address as the employee
- Contact has the same telephone number as the employee

Address

Country United States
 Address

Employee's Current Address

Country United States
 Address 3201 Gadsden Street
 Columbia, SC 29201
 Richland

Phone

Telephone 803/4 [redacted] Extension

Other Telephone Numbers

Phone Numbers

| Phone Type | Phone Number | Extension | Delete |
|------------|--------------|-----------|--------|
| | | | |

[Return to Emergency Contacts](#)

University of South Carolina - Division of Human Resources

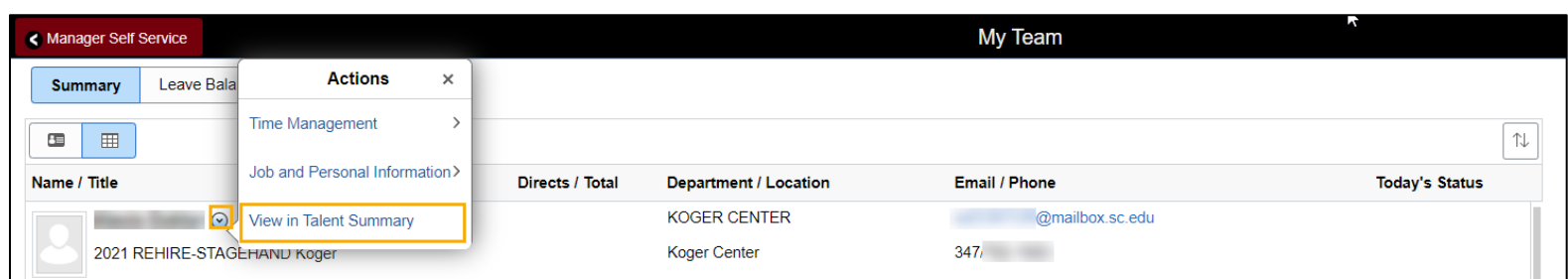
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

From the **Related Action Menu** select the **View in Talent Summary** option.

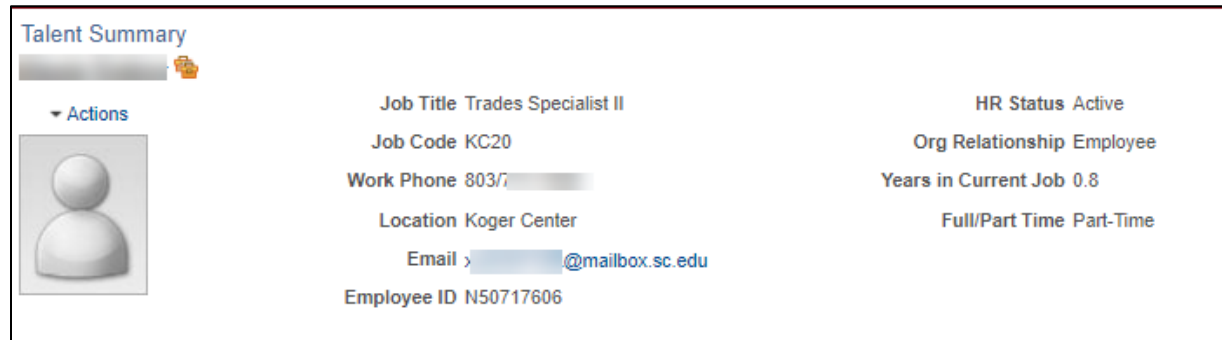
The **Talent Summary** page provides different information than what was shown previously on the Employee Information page including time in current job and years of service.

Manager Dashboard

Navigate back to **Manager Self Service** and click the **Manager Dashboard** tile.

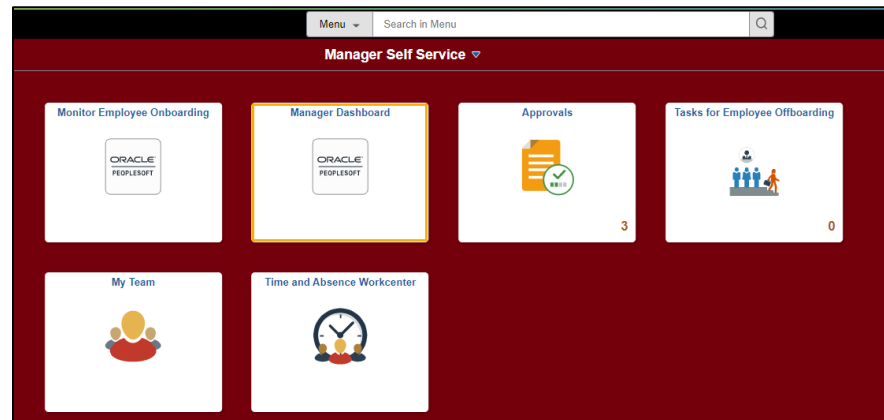


The screenshot shows the 'Manager Self Service' interface. At the top, there's a navigation bar with 'Manager Self Service' and 'My Team'. Below this, there's a 'Summary' tab and a 'Leave Balance' section. An 'Actions' menu is open, showing options like 'Time Management', 'Job and Personal Information', and 'View in Talent Summary' (which is highlighted with a yellow box). Below the menu is a table with columns: 'Name / Title', 'Directs / Total', 'Department / Location', 'Email / Phone', and 'Today's Status'. The table contains one entry for '2021 REHIRE-STAGEHAND Koger' at 'Koger Center' with email '@mailbox.sc.edu' and phone '347/...'.



The 'Talent Summary' page displays the following information for the employee:

- Job Title:** Trades Specialist II
- Job Code:** KC20
- Work Phone:** 803/7-...
- Location:** Koger Center
- Email:** ...@mailbox.sc.edu
- Employee ID:** N50717606
- HR Status:** Active
- Org Relationship:** Employee
- Years in Current Job:** 0.8
- Full/Part Time:** Part-Time



The 'Manager Self Service' Manager Dashboard features several tiles:

- Monitor Employee Onboarding:** Oracle PeopleSoft icon.
- Manager Dashboard:** Oracle PeopleSoft icon, highlighted with a yellow border.
- Approvals:** Document icon with a checkmark and a count of 3.
- Tasks for Employee Offboarding:** Group of people icon with a count of 0.
- My Team:** Group of people icon.
- Time and Absence Workcenter:** Clock icon.

University of South Carolina - Division of Human Resources

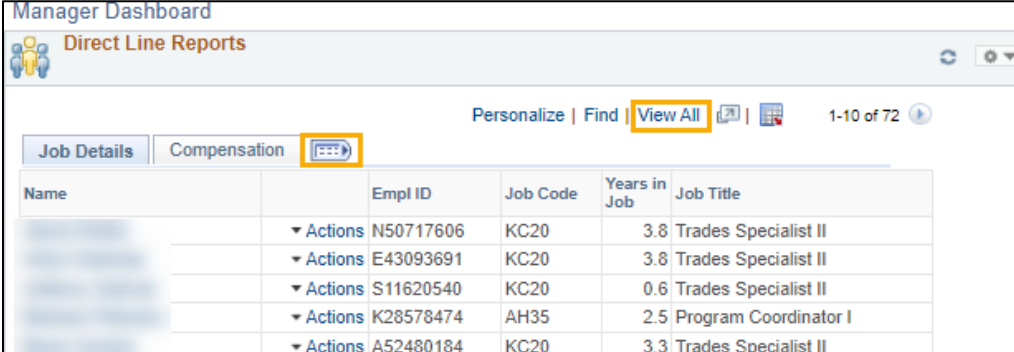
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

The Manager Dashboard provides a quick overview of all your employees including their USC ID, job Code, Years in Job and Compensation.

To view all information at once, click the **expand** icon and click the **View All** link (only necessary if you have more than 10 employees).

If you wish to download the data into an excel spreadsheet, click the **export** icon.

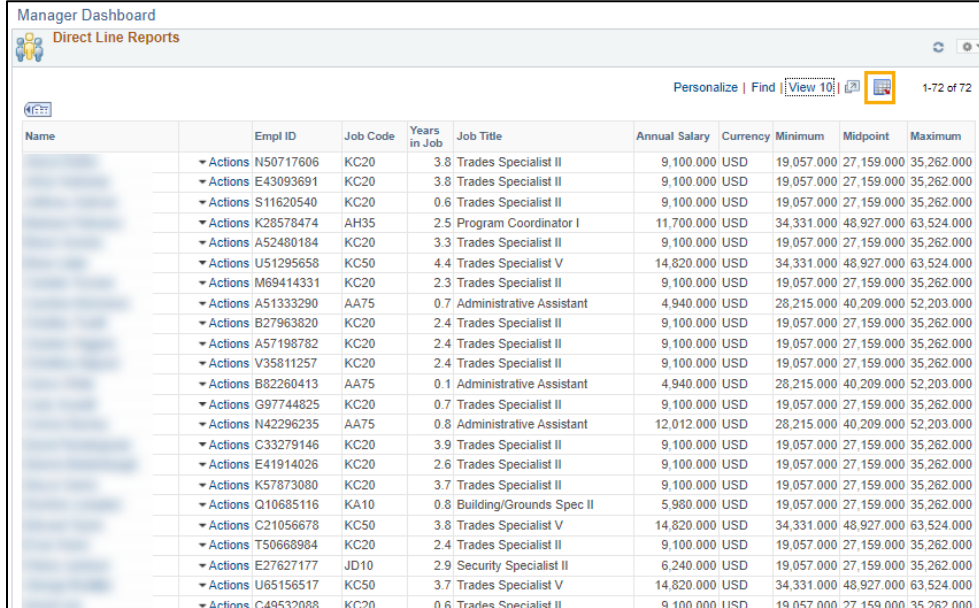
Congratulations! You have successfully learned how to view onboarding summary for your new employees and review time management, job and personal information, talent summary, and manager dashboard.



Manager Dashboard
Direct Line Reports

Personalize | Find | **View All** | 1-10 of 72

| Name | Empl ID | Job Code | Years in Job | Job Title |
|-----------|-----------|----------|--------------|-----------------------|
| ▼ Actions | N50717606 | KC20 | 3.8 | Trades Specialist II |
| ▼ Actions | E43093691 | KC20 | 3.8 | Trades Specialist II |
| ▼ Actions | S11620540 | KC20 | 0.6 | Trades Specialist II |
| ▼ Actions | K28578474 | AH35 | 2.5 | Program Coordinator I |
| ▼ Actions | A52480184 | KC20 | 3.3 | Trades Specialist II |



Manager Dashboard
Direct Line Reports

Personalize | Find | **View All** | 1-72 of 72

| Name | Empl ID | Job Code | Years in Job | Job Title | Annual Salary | Currency | Minimum | Midpoint | Maximum |
|-----------|-----------|----------|--------------|--------------------------|---------------|----------|------------|------------|------------|
| ▼ Actions | N50717606 | KC20 | 3.8 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | E43093691 | KC20 | 3.8 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | S11620540 | KC20 | 0.6 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | K28578474 | AH35 | 2.5 | Program Coordinator I | 11,700.000 | USD | 34,331.000 | 48,927.000 | 63,524.000 |
| ▼ Actions | A52480184 | KC20 | 3.3 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | U51295658 | KC50 | 4.4 | Trades Specialist V | 14,820.000 | USD | 34,331.000 | 48,927.000 | 63,524.000 |
| ▼ Actions | M69414331 | KC20 | 2.3 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | A51333290 | AA75 | 0.7 | Administrative Assistant | 4,940.000 | USD | 28,215.000 | 40,209.000 | 52,203.000 |
| ▼ Actions | B27963820 | KC20 | 2.4 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | A57198782 | KC20 | 2.4 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | V35811257 | KC20 | 2.4 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | B82260413 | AA75 | 0.1 | Administrative Assistant | 4,940.000 | USD | 28,215.000 | 40,209.000 | 52,203.000 |
| ▼ Actions | G97744825 | KC20 | 0.7 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | N42296235 | AA75 | 0.8 | Administrative Assistant | 12,012.000 | USD | 28,215.000 | 40,209.000 | 52,203.000 |
| ▼ Actions | C33279146 | KC20 | 3.9 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | E41914026 | KC20 | 2.6 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | K57873080 | KC20 | 3.7 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | Q10685116 | KA10 | 0.8 | Building/Grounds Spec II | 5,980.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | C21056678 | KC50 | 3.8 | Trades Specialist V | 14,820.000 | USD | 34,331.000 | 48,927.000 | 63,524.000 |
| ▼ Actions | T50668984 | KC20 | 2.4 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | E27627177 | JD10 | 2.9 | Security Specialist II | 6,240.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |
| ▼ Actions | U65156517 | KC50 | 3.7 | Trades Specialist V | 14,820.000 | USD | 34,331.000 | 48,927.000 | 63,524.000 |
| ▼ Actions | C49532088 | KC20 | 0.6 | Trades Specialist II | 9,100.000 | USD | 19,057.000 | 27,159.000 | 35,262.000 |