



# SOAR

A NEWSLETTER OF THE UNIVERSITY OF MEMPHIS  
SOFTWARE OF OPERATIONAL AND ADMINISTRATIVE RESOLVE



## SOAR Newsletter Configure and Build Phase

October 2024

Welcome to the SOAR Newsletter | *The Configure and Build Phase is Underway!*

**In this edition** | HCM Workstream and Employee Self Service are in the spotlight! View updates from other workstreams during the **Configure and Build Phase** - initiated in August and concluding in December.

Also, check out our [SOAR website](#) to view our team, get access to the latest resources and get information on upcoming SOAR events!

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**Looking Ahead** | The SOAR team will begin testing our new system!

**Testing** enables the execution of SOAR business processes in a controlled, simulated environment to validate that the system meets the documented requirements before **go-live on July 1, 2025**.

In spring 2024, campus users will be part of the last testing cycle to obtain broader campus representation.

### Testing Objectives Overview

#### Planning

Develop comprehensive test plan, define resource and data requirements

#### Development

Identify business processes/scenarios to be tested

#### Execution

Execute test scripts and log and track any defects

#### Sign-Off

Follow up and resolve defects to obtain sign-off (confirming a successful test)



## WORKSTREAM HIGHLIGHT

The SOAR project is made up of several workstreams with team members representing various units and departments across campus. Here, workstream leads share updates on their ongoing work.



### Human Capital Management (HCM): Employee Self Service

**Employee Self Service in Oracle** empowers employees to initiate changes to their personal record. Employees can manage their data through an intuitive interface and track the status of their requests.

**The Employee Self Service Dashboard** is a central hub for employees to view details about their person profile, job and salary information.

This reduces clerical risks, eliminating errors due to data entry from paper/email into the system and providing the ability to track status of a request.

#### Key Functionalities

**Personal Information Management:** Employees can easily update their contact details, emergency contacts and other personal information. This ensures that the University's records are always current and accurate.



**Payroll and Compensation:** Employees can view and download their pay stubs, review compensation history and manage direct deposit information. This functionality provides transparency and helps employees stay informed about their earnings.

**Time and Attendance:** The platform allows employees to track their working hours, request time off and view their leave balances. This feature simplifies time management and ensures accurate attendance records.

**Performance Management:** Employees can set goals, track progress and participate in performance reviews. This fosters a culture of continuous improvement and professional development.



## Project and Grants Management (PGM): Internally Funded Projects

**In the future state**, Internally Funded Projects will be defined by one Project per Principal Investigator with the following Tasks:

- 1** - IDCR
- 2** - Start Up
- 3** - Research Grant (Department)
- 4** - Research Grant (Research)

The budgets for Internally Funded Projects will be **entered by the department** with approval by Financial Planning.

Internally Funded Projects will have **absolute budget control** – if budget is not available, the purchase requisition/expenditure will fail.

## Enterprise Performance Management (EPM): Budget View and Carryforward

- Users will be able to **more easily view their budgets and available balances** through the improved user interface
  - Users will no longer have to manually calculate Base Budget as this will be a field within Oracle unlike in the current Banner Budget Query screen.
  - Carryforward Budget will have its own field as well, so users can easily see what amount of their budget is related to carryforward funds.

**In the future state**, there will be no PDF budget revisions. Oracle EPM will allow users to **submit all types of budget requests through the system** and they will route through approvals as needed. Users will be able to quickly and easily view all budget revisions submitted and their status (e.g. Pending Approval, Budget Office Approved, etc.).

## Procure to Pay (PTP): Better Documentation on Reqs, POs and Invoices

- **In the Future State** users will have the ability to leave comments on requisitions, POs and invoices. This in-system documentation will increase visibility and eliminate the back and forth communications in the current state.
- Absolute budgetary control on procurement requisitions - if there are insufficient funds the requisition can not be processed.
  - *This does not apply to travel expenses, there will be no budgetary control on travel expenses.*

## RESOURCES

### *Introducing: SOAR Change Champions!*



This fall, SOAR welcomed a group of 50+ representatives from across campus to join a Change Champion Network.

Change Champions serve as liaisons between SOAR and the campus community, allowing you to easily give SOAR feedback, ask questions and get more SOAR information.

If you have any questions leading up to go-live on July 1, 2025, reach out to a SOAR Change Champion or view our SOAR resources below!



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