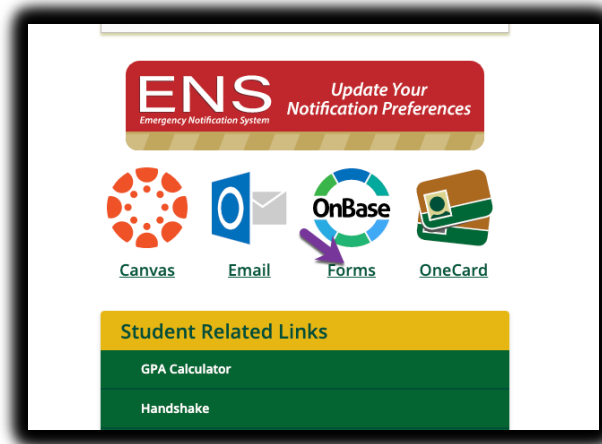


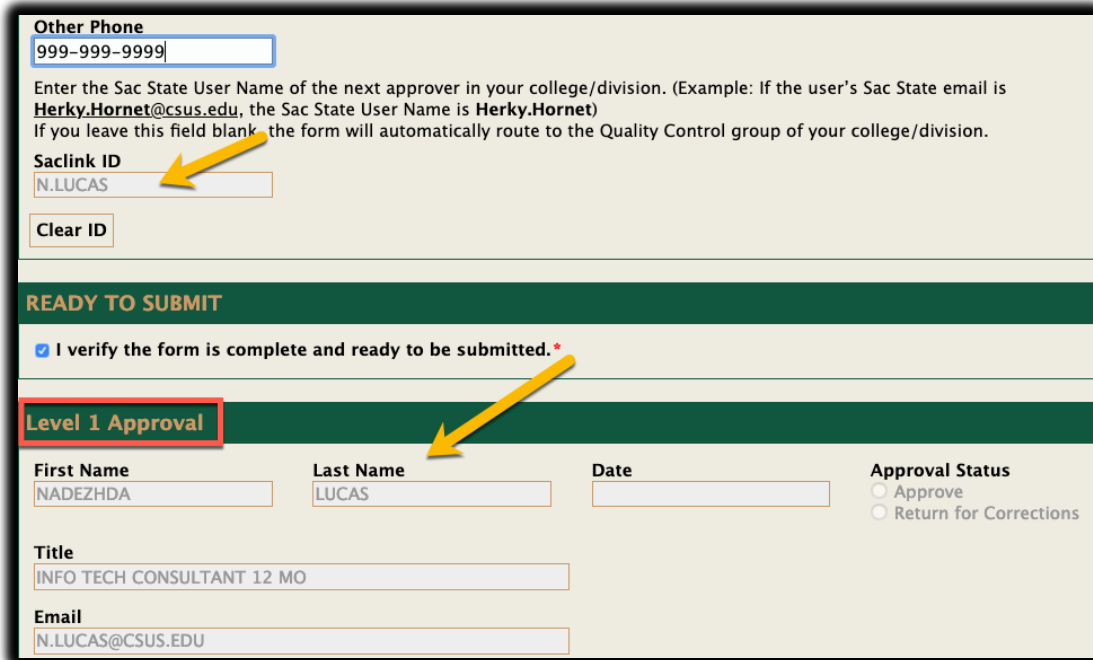
## Employee Personnel Transaction OnBase Form and Workflow User Guide for THE APPROVERS

1. The new Employee PTF will be available on My Sac State portal under OnBase forms:

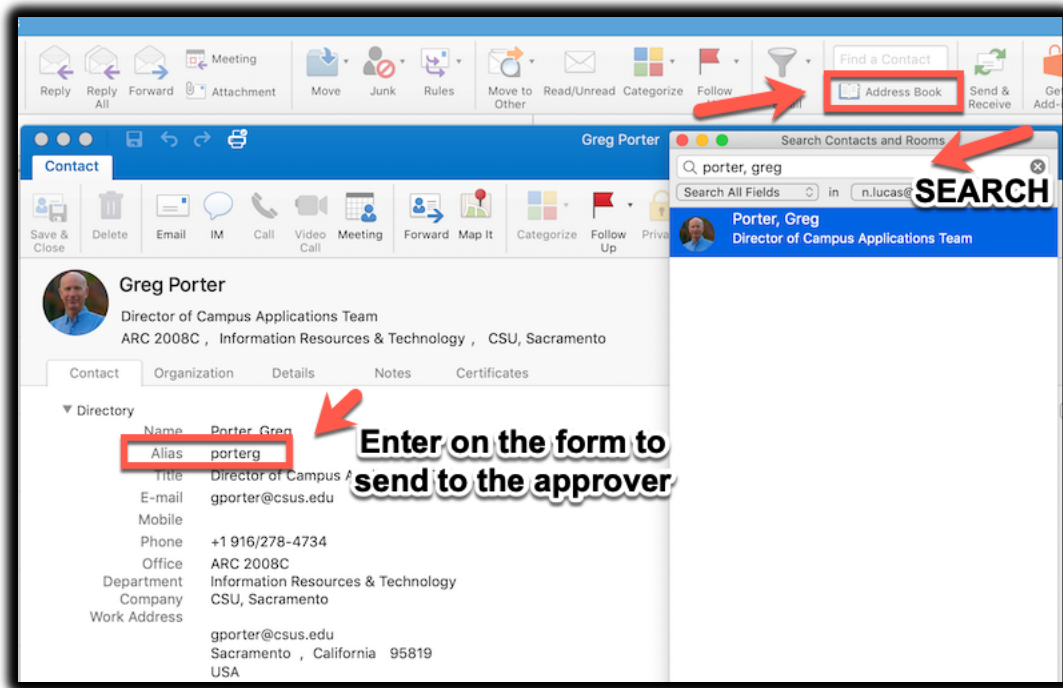


2. When submitters fill out a PTF, they will be able to send it to the appropriate approver within their department/division. ***This is a new feature in OnBase – all other OnBase forms route automatically based on the Department ID or Student Academic Plan.***

Submitters will enter the approver's **Sac Link ID (Sac State user name)** on the form:

A screenshot of the OnBase form. At the top, there is a field for 'Other Phone' with the value '999-999-9999'. Below this is a text box with instructions: 'Enter the Sac State User Name of the next approver in your college/division. (Example: If the user's Sac State email is Herky.Hornet@csus.edu, the Sac State User Name is Herky.Hornet) If you leave this field blank, the form will automatically route to the Quality Control group of your college/division.' Below the instructions is a field for 'Samlink ID' with the value 'N.LUCAS' and a yellow arrow pointing to it. There is a 'Clear ID' button below the field. A green bar with the text 'READY TO SUBMIT' is below the 'Samlink ID' field. Below this is a checkbox with the text 'I verify the form is complete and ready to be submitted.\*' which is checked. Below the checkbox is a green bar with the text 'Level 1 Approval' and a yellow arrow pointing to it. Below the 'Level 1 Approval' bar is a table with four columns: 'First Name', 'Last Name', 'Date', and 'Approval Status'. The 'First Name' field contains 'NADEZHDA', the 'Last Name' field contains 'LUCAS', and the 'Date' field is empty. The 'Approval Status' field has two radio buttons: 'Approve' (selected) and 'Return for Corrections'. Below the table are fields for 'Title' (INFO TECH CONSULTANT 12 MO) and 'Email' (N.LUCAS@CSUS.EDU).

- In some cases, the Sac Link ID is different from the Sac State Email (**herky.hornet@csus.edu**). To find the approver's Sac Link ID (user name), go to the Outlook/Address Book, search for the employee and see their **ALIAS** – that is their ID. Enter it on the form.



If the SacLink ID is not valid, there will be an appropriate message and the approver's section will not open.

The screenshot shows a form with the following elements:
 

- 'Other Phone' field (empty)
- Instruction: 'Enter the Sac State User Name of the next approver in your college/div. If you leave this field blank, the form will automatically route to the Q'.
- 'Saclink ID' field containing 'nadyalucas', with a red arrow pointing to it and the text 'Not Valid' next to it.
- 'Clear ID' button.
- 'READY TO SUBMIT' section with a checkbox: 'I verify the form is complete and ready to be submitted.\*'.
- 'Submit' button.

- If the Saclink ID (user name) field is **left empty**, it will not go to the approver but will move to the next office depending on the division. In colleges and those divisions that

have Quality Control groups, the form will route to the QC. In those divisions that do not have a QC group, the form will move to HR.

5. When the form routes to the approver, they will receive an email with the link to the form:



6. The approver will click on the link, which will bring them to the form waiting for review/approval:
  - a. Review the form
  - b. Click **Approve** or **Return for Corrections**. If returning, the comments will be required.
  - c. Enter the next approver's **Sac Link ID** or **leave the field empty** – the form will move to QC, HR or OFA depending on the division.
  - d. Click **Save Form**
  - e. Click **E-Form Completed**

LIFE CYCLE VIEW WORK FOLDER

Contains... HR Personnel Transaction Form - [redacted] LUCAS, NADEZHDA 5/20/2021 4:15:34 PM

Items: 1  
E-Form Completed

Click when done

APPROVAL  
Pending Approvals (1)  
Submitter Review (0)

IN: LUCAS  
Clear ID

**READY TO SUBMIT**

I verify the form is complete and ready to be submitted.\*

**Level 1 Approval**

First Name: NADEZHDA  
Last Name: LUCAS  
Date: [redacted]

Approval Status  
 Approve  
 Return for Corrections

Click Approve or Return for Corrections

Title: INFO TECH CONSULTANT 12 MO

Email: N.LUCAS@CSUS.EDU

Comment: [redacted]

Enter the Sac State User Name of the next approver in your college/division. (Example: If the user's Sac State email is Herky.Hornet@csus.edu, the Sac State User Name is Herky.Hornet)  
If you leave this field blank, the form will automatically route to the Quality Control group of your college/division.

Samlink ID: [redacted]

Enter the next approver's Sac Link ID or leave EMPTY

Clear ID

Save Form

CLICK SAVE

HR Personnel Transaction Form v1.04162020

When returning for corrections, the notes will display on the top of the form – please put specific details of what needs to be corrected:

APPROVAL  
Pending Approvals (1)  
Submitter Review (0)

Items: 1  
E-Form Completed

**Personnel Transaction Form**

**FOR TESTING**

College/Program ID: 42300

Dept ID: 42300

**NOTES FROM THE APPROVERS/QC**

Corrections needed

**EMPLOYEE INFORMATION**

EmpID\*: [redacted] HR Form #: 3451

REGULAR

7. When finished making corrections, the submitter will need to click **Save** and **E-Form Completed**. The form will return to the same approver that sent it back.
8. The final approver of the form is a VP or AVP (depending on the division and availability of the VP). The QC group will be sending the forms to the final approvers. If there is no QC, it will be up to a first approver to send the form to the VP/AVP for the final approval.
9. A separate document will be provided outlining the PTF workflows in each division.