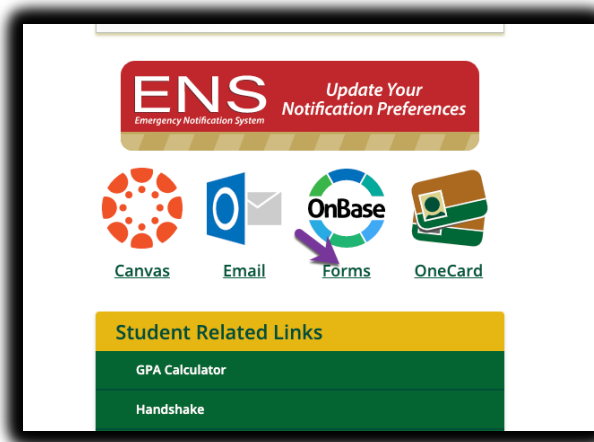
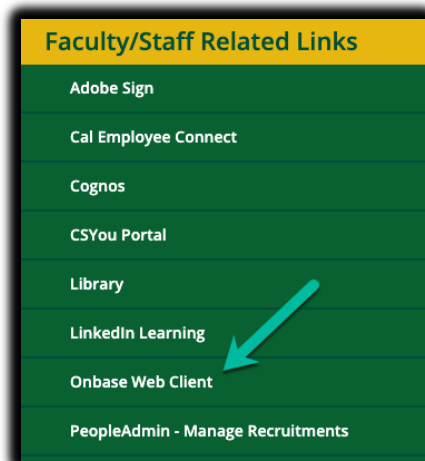


## Employee Personnel Transaction OnBase Form and Workflow User Guide for THE QUALITY CONTROL GROUPS

1. The following divisions will have Quality Control groups for the PTF:
  - a. All Colleges have a QC group for each college and there is another QC queue at the Academic Affairs level – all forms from all colleges (faculty and staff) will route to the Academic Affairs queue before they get approved by the Provost.
  - b. Student Affairs
  - c. ABA
  - d. President's Office (for the forms submitted by the Athletics department)
2. The new Employee PTF will be available on My Sac State portal under OnBase forms:



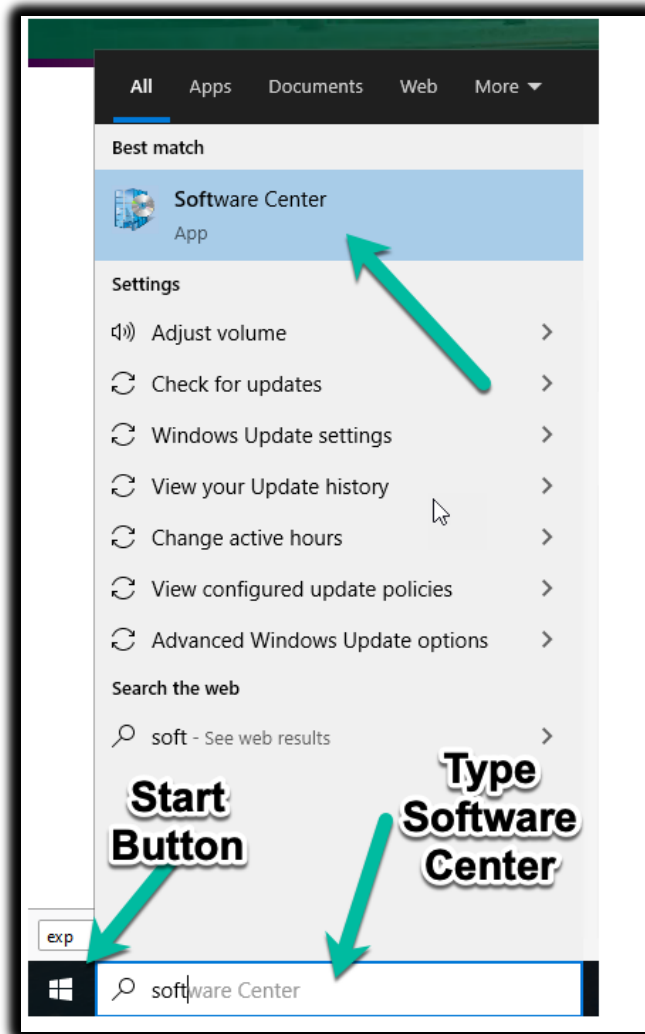
1. Please sign into OnBase using Web or Unity Client. You can access **OnBase Web Client** through My Sac State:



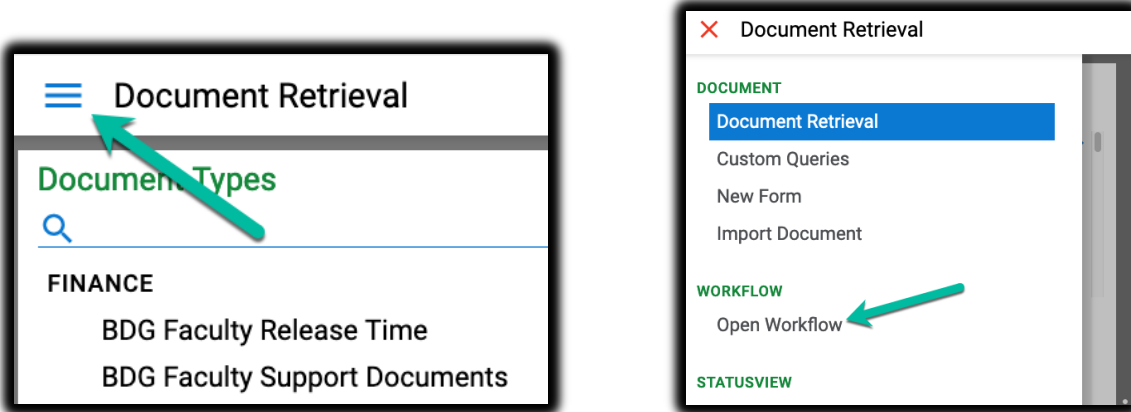
You can download the desk top version called **OnBase Unity Client** through your Software Center (Unity Client is not compatible with Mac computers):



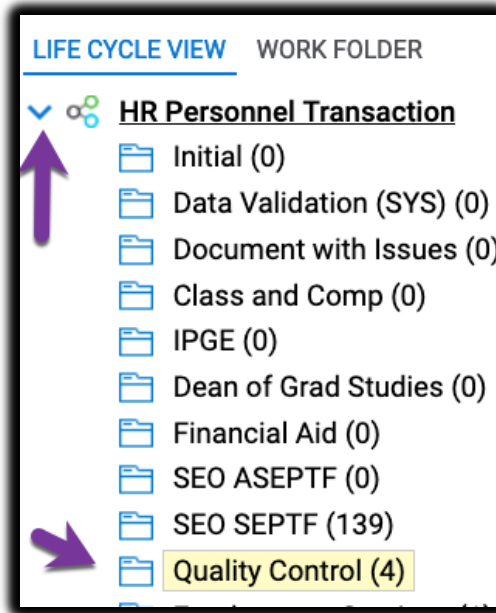
Go to your Start Button, type Software Center in the search field, click on the Software Center, download the app.



2. Sign into OnBase and Click on the “hamburger” button on the top left and click **Open Workflow** (in the Web client). In Unity Client, click **Workflow**.



3. Go to the HR Personnel Transaction life cycle/Quality Control folder:



4. To process the form:
  - a. Review the form (you can make corrections, if needed)
  - b. Click **Review/Approve** or **Return to Submitter** (if cannot correct yourself)
  - c. Enter the next approver’s Sac Link ID
    - i. In colleges, it will be the Dean or the Associate Dean – the form will then move to the Academic Affairs QC and they will send it to the Provost.

- ii. In other divisions, it will be Vice President or an Administrator in Charge
- d. Click **Save** at the bottom of the form
- e. Click **Review Complete** or Return to Submitter on the top

The screenshot shows a web-based Quality Control form. At the top left, a navigation menu includes 'Quality Control (4)'. The top right shows the user 'LINDA' and 'HR Perso'. Below the navigation, there are buttons for 'Review Complete', 'Return to Submitter', and 'Add Sticky Notes'. A purple arrow points to the 'Review Complete' button with the text 'Click review Complete or Return to Submitter at the end'. Another purple arrow points to the top right with the text 'Click on the form to open'. The main form area has fields for 'Name', 'Date', and 'Review Status' (with radio buttons for 'Review/Approve' and 'Return to Submitter'). A 'Comment' field is also present. Below these is a text instruction: '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)'. There is a 'Saclink ID' field with a purple arrow pointing to it and the text 'Enter the next Approver's Saclink ID'. At the bottom, there is a 'Clear ID' field and a purple arrow pointing to the bottom with the text 'Click Save Form at the very bottom'.

- 5. Academic Affairs QC: when PTFs are submitted in colleges for any faculty or staff, the forms will always move to the Academic Affairs QC. After their review, the Academic Affairs QC group will send the form to the Provost or an Administrator in Charge:

The screenshot shows a web-based Academic Affairs QC form. The top navigation bar includes 'LIFE CYCLE VIEW', 'WORK FOLDER', and a list of folders: 'Academic Affairs Quality Control (1)', 'Payroll (7)', and 'Under Approvals (SYS) (92)'. The top right shows columns for 'HR FORM #', 'SENT FROM', 'EMPLID', 'FIRST NAME', 'LAST NAME', and 'DOCUMENT'. Below this, there are buttons for 'Add Sticky Notes', 'Review Complete', and 'Return to Submitter'. A red arrow points to the 'Return to Submitter' button. The main form area has fields for 'Name' (Lucas, Nadya), 'Date' (06/02/2021), and 'Review Status' (with radio buttons for 'Review/Approve' and 'Return to Submitter'). A 'Comment' field contains 'TEST COMMENTS'. Below this is a text instruction: '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)'. There is a 'Saclink ID' field with a red arrow pointing to it and the text 'Enter Provost's ID'. At the bottom, there is a 'Clear ID' field and a red arrow pointing to the bottom with the text 'Click SAVE at the very bottom'. A red arrow also points to the 'Review Status' radio buttons with the text 'Click the radio button'.

6. If you Return to Submitter, the Reasons are going to be required and they will be displayed at the top of the form. When the Submitter makes adjustments, the form will route to the College QC for additional review. The QC groups can send it to the Dean/AD again or leave the SaLink ID blank and the form will route to you again.

The screenshot displays the OnBase HR system interface. On the left, a navigation pane shows a 'WORK FOLDER' with 'Quality Control (4)' highlighted by a red arrow. The main area shows an 'Inbox' with a table of items. Below the table, there are buttons for 'Review Complete', 'Return to Submitter', and 'Add Sticky Notes'. The 'Return to Submitter' button is highlighted with a red arrow. Below the inbox, there is a section for 'INTERNAL NOTE LOG' with a note that reads 'TEST RETURN TO SUBMITTER FROM ACADEMIC AFFAIRS QC', also highlighted with a red arrow. At the bottom, the 'EMPLOYEE INFORMATION' section shows fields for 'Dept ID' (33400), 'EmplID', and 'HR Form #' (3481). There are also radio buttons for 'REGULAR', 'POI', and 'NO EEMPLID', with 'REGULAR' selected.

7. In Colleges, if a member of the QC group submits a PTF, it will not go to the QC queue but will go either to the approver (if assigned) or to OFA/Employments Services (automatically, if the field for the approver is left empty).
8. In SA, ABA, and AA, if a QC person submits a PTF, it will go to the QC for the review.