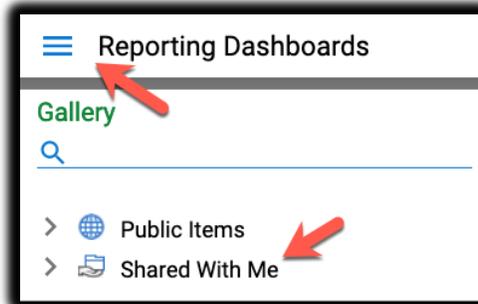
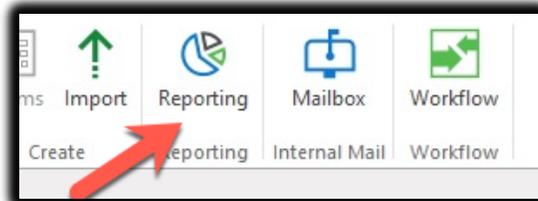


Employee Personnel Transaction OnBase Form and Workflow User Guide for Accessing Reports and Custom Query

1. Only certain groups on campus will be granted permissions to see the PTF reports and Custom Queries:
 - a. All PTF processing offices (HR, OFA, Budget Office)
 - b. QC groups
2. To access **Reports**, sign into OnBase Web or Unity Client. In **Web Client**, click the “hamburger” button on the top left and click **Gallery/Shared with Me**:



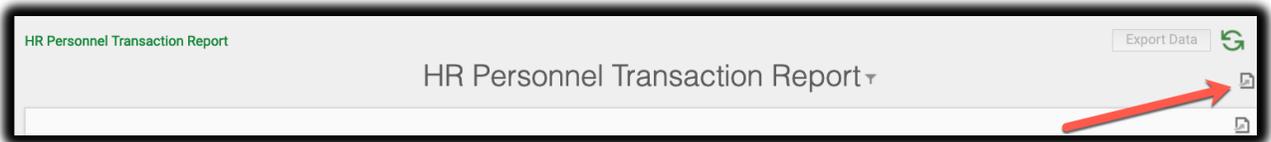
In **Unity Client**, click **Reporting** on top.



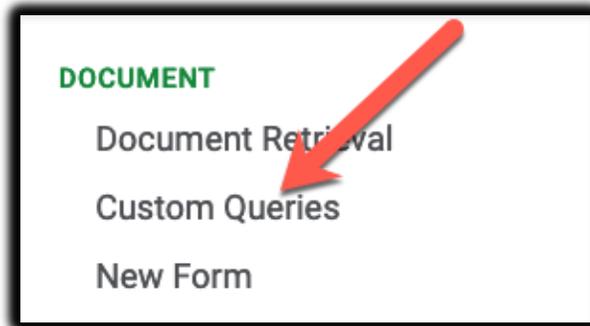
3. Click on the **HR Personnel Transaction** report and the report will be on the right. You click on each category's header to sort the column



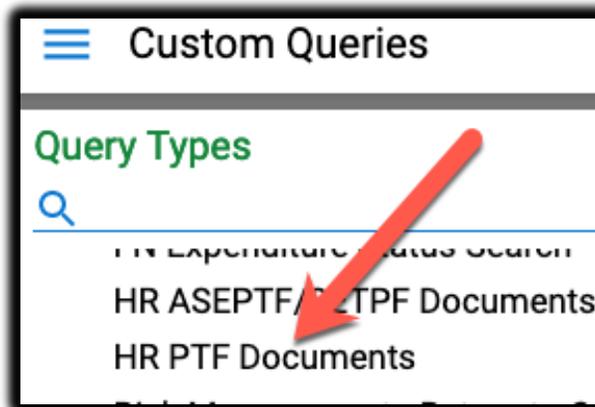
4. To **Export** the report into Excel, PDF or Image, click on the button on the top right and choose the format:



5. To access the **PTF Custom Query**, click on the “hamburger button” on the top left and click **Custom Queries**:



6. Click on **HR PTF Documents**:



7. There are various Search options. Choose how you want to search and click **SEARCH**:

✓ HR PTF Documents

Student Record Forms

[SHOW INSTRUCTIONS](#)

Document Date

Search Type

[KEYWORDS](#)

EmplID =

First Name =

Last Name =

HR Form # =

PTF Transaction Categories =

PTF Transaction Sub Categories =

Department Name =

College/Program Name =

Search

8. You can start typing under the header of each column to sort:

Query Types

- HR ASEPTF/SETPF Documents
- HR PTF Documents
 - Risk Management - Return to Campus Safely Protocol
 - SR All Documents
 - SR Declaration of Change of Major/Minor
 - SR GE Graduation Requirement Substitution Petition
 - Student Record Documents
 - Student Record Exemption

Document Date

Search Type

KEYWORDS

EmplID =

First Name =

Last Name =

HR Form # =

PTF Transaction Categories =

LEAVES WITH PAY

Custom Query Results

Drag a column header here to group by that column.

| EM # | EMPLID | FIRST NAME | LAST NAME | DEPTID | DEPARTMENT NAME | COLLEGE/PROGRAM ID | COLLEGE/PROGRAM NAME |
|--------|--------|------------|-----------|--------|---------------------------|--------------------|----------------------|
| als... | | NADEZHDA | LUCAS | 42300 | IRT-INFO RESOURCES & TECH | 42300 | VP's Office |
| | | NADEZHDA | LUCAS | 42300 | IRT-INFO RESOURCES & TECH | 42300 | VP's Office |
| | | ANTHONY | LUCAS | 49000 | BUSINESS AND ADMIN SVCS | 49000 | Business |

Items: 3 of 14

9. You can scroll to the right and see document process status and the approval status:

by that column.

| EMPLOYMENT STATUS | CATEGORIES | SUB CATEGORIES | DOCUMENT PROCESS STATUS | DOCUMENT APPROVER STAT... | DOCUMENT A |
|-------------------|-----------------|---------------------------------------|-------------------------|---------------------------|------------|
| PERMANENT | LEAVES WITH PAY | PAID ADMINISTRATIVE LEAVE | COMPLETE | APPROVED | 6/7/2021 |
| PROBATIONARY | LEAVES WITH PAY | DIFFERENCE IN PAY LEAVE, ONE SEMESTER | COMPLETE | APPROVED | 5/12/2021 |
| PERMANENT | LEAVES WITH PAY | DIFFERENCE IN PAY LEAVE, ONE SEMESTER | COMPLETE | APPROVED | 5/3/2021 |