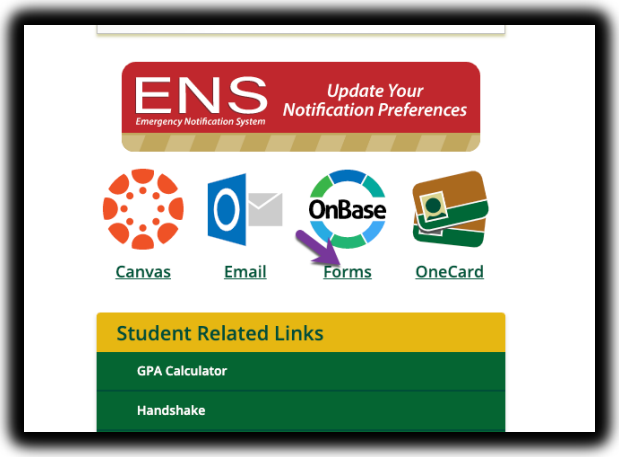
Employee Personnel Transaction OnBase Form and Workflow User Guide for THE QUALITY CONTROL GROUPS

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:

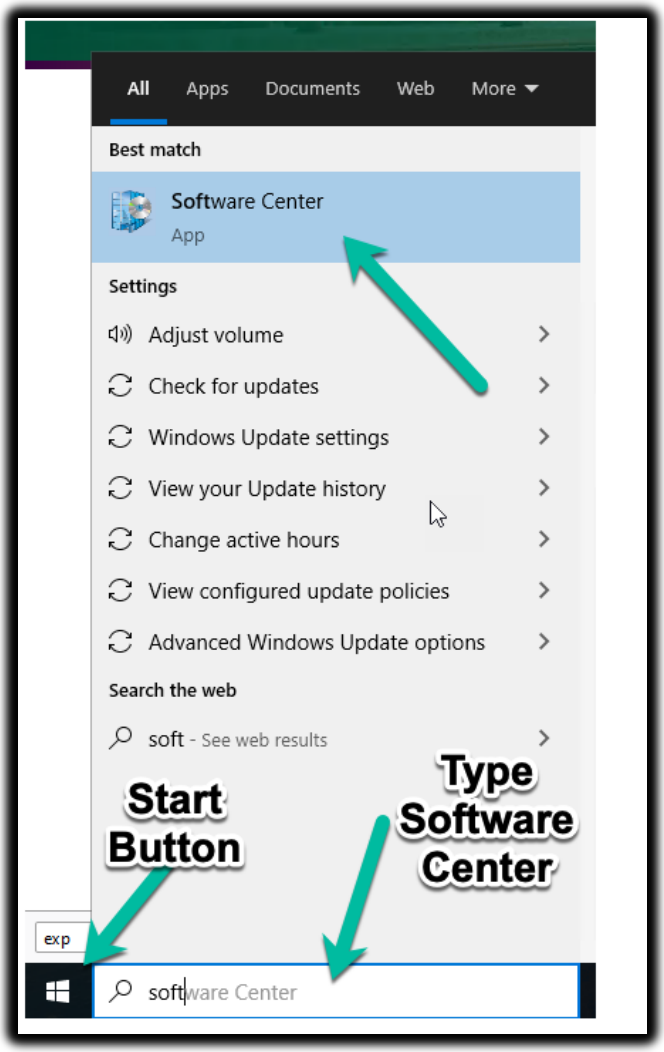


1. Please sign into OnBase using Web or Unity Client. You can access **OnBase Web Client** through My Sac State:

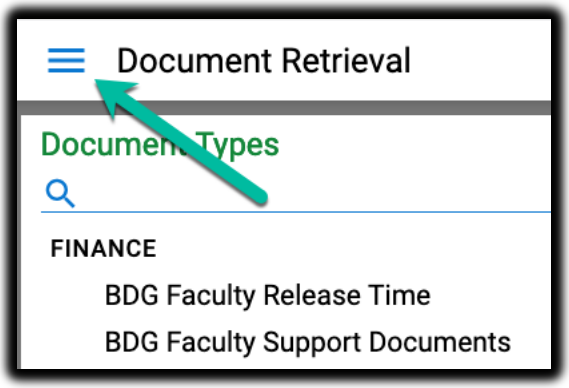


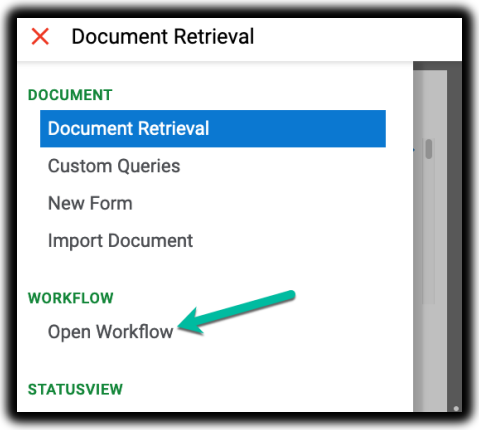
You can download the desk top version called **OnBase Unity Client** through your Software Center (Unity Client is not compatible with Mac computers):

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

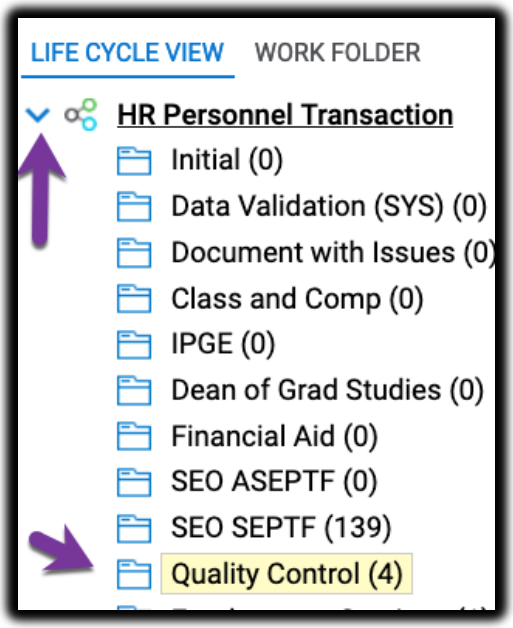


2. Sign into OnBase and Click on the “hamburger” button on the top left and click **Open Workflow** (in the Web client). In Unity Client, click **Workflow**.





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



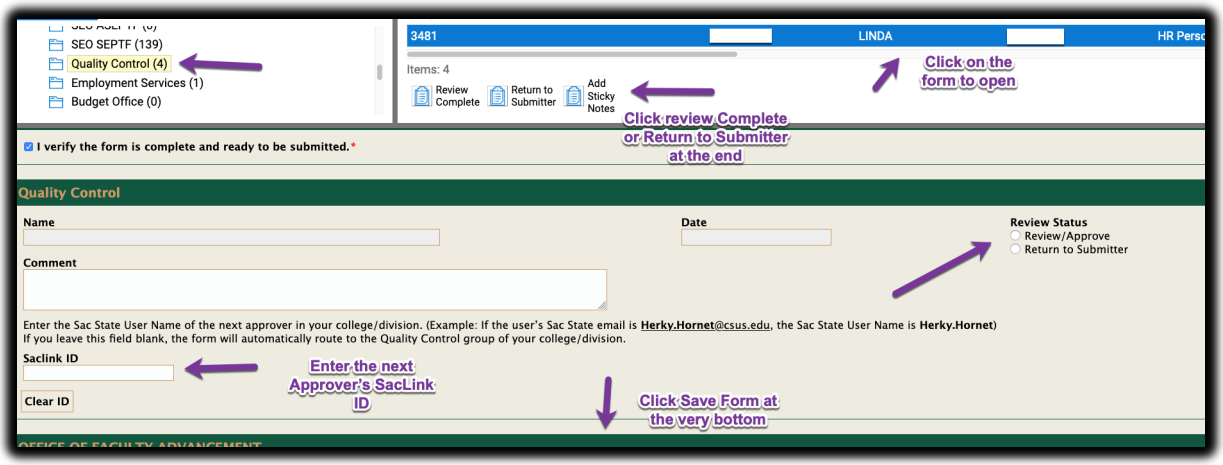
4. To process the form:

    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.

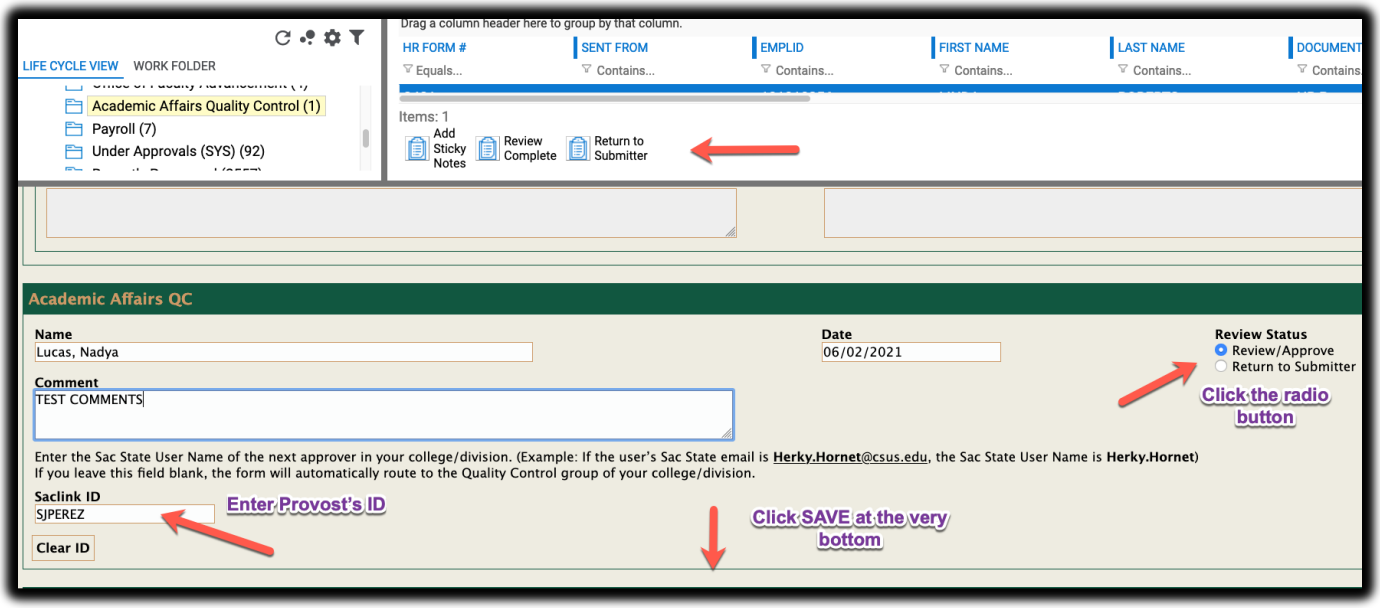
ii. In other divisions, it will be Vice President or an Administrator in Charge

d. Click **Save** at the bottom of the form

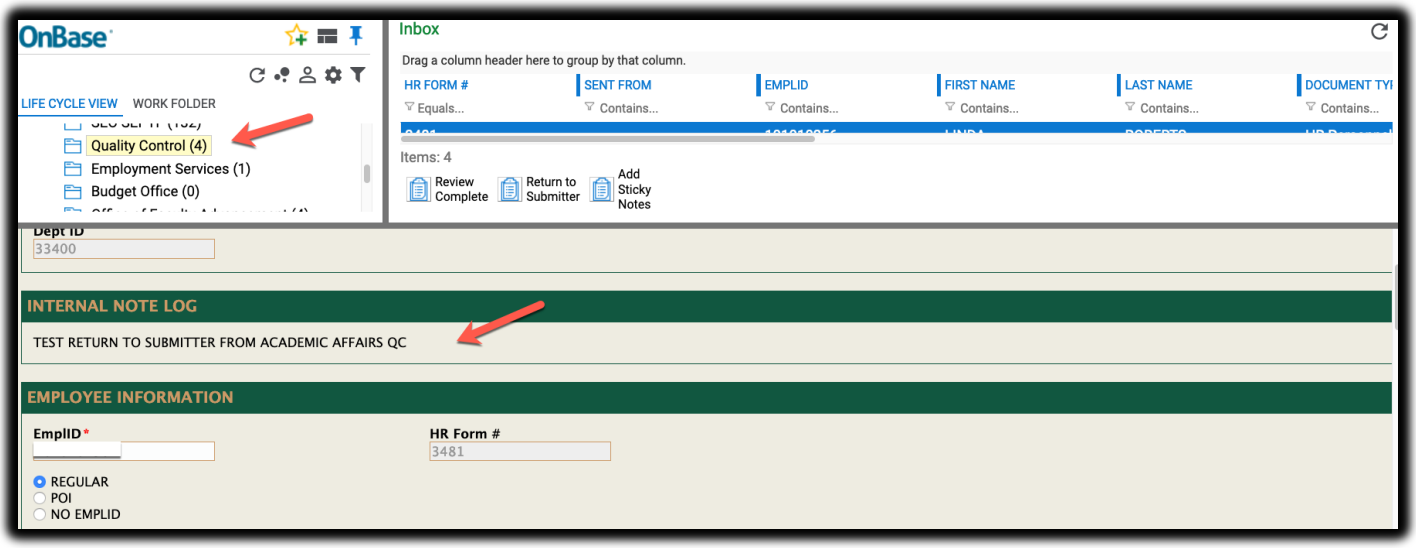
e. Click **Review Complete** or Return to Submitter on the top



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:



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 SacLink ID blank and the form will route to you again.



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.