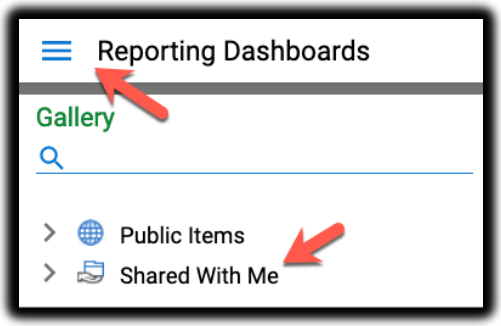
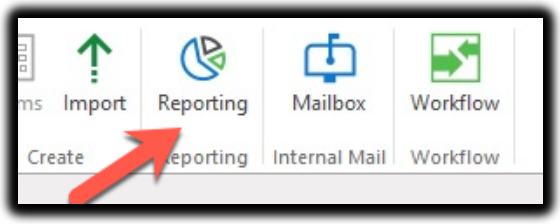
Employee Personnel Transaction OnBase Form and Workflow User Guide for Accessing Reports and Custom Query

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**:



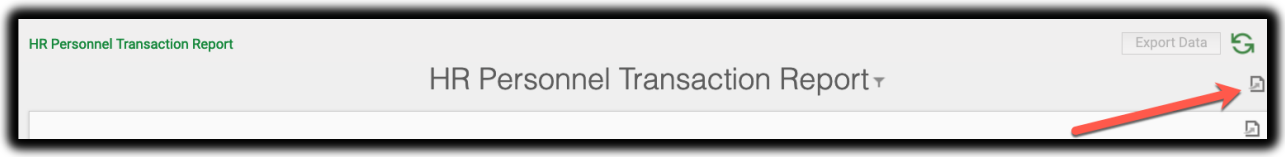
In **Unity Client**, click **Reporting** on top.



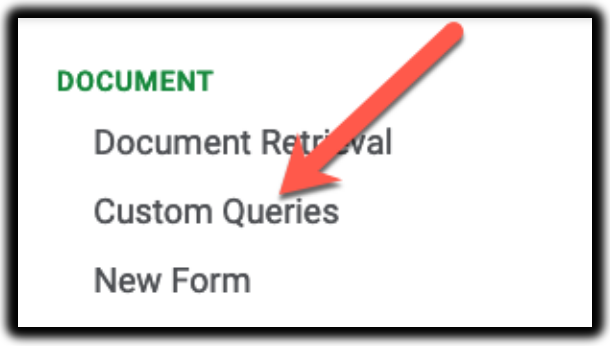
3. Click on the **HR Personnel Transaction** report and the report will be on the right. You click on each category's header to sort the column



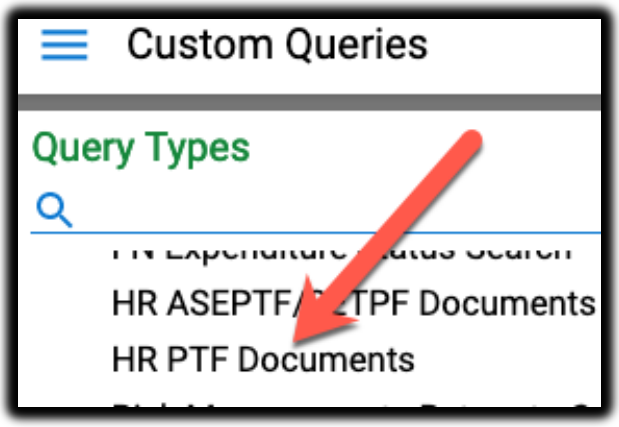
4. To **Export** the report into Excel, PDF or Image, click on the button on the top right and choose the format:



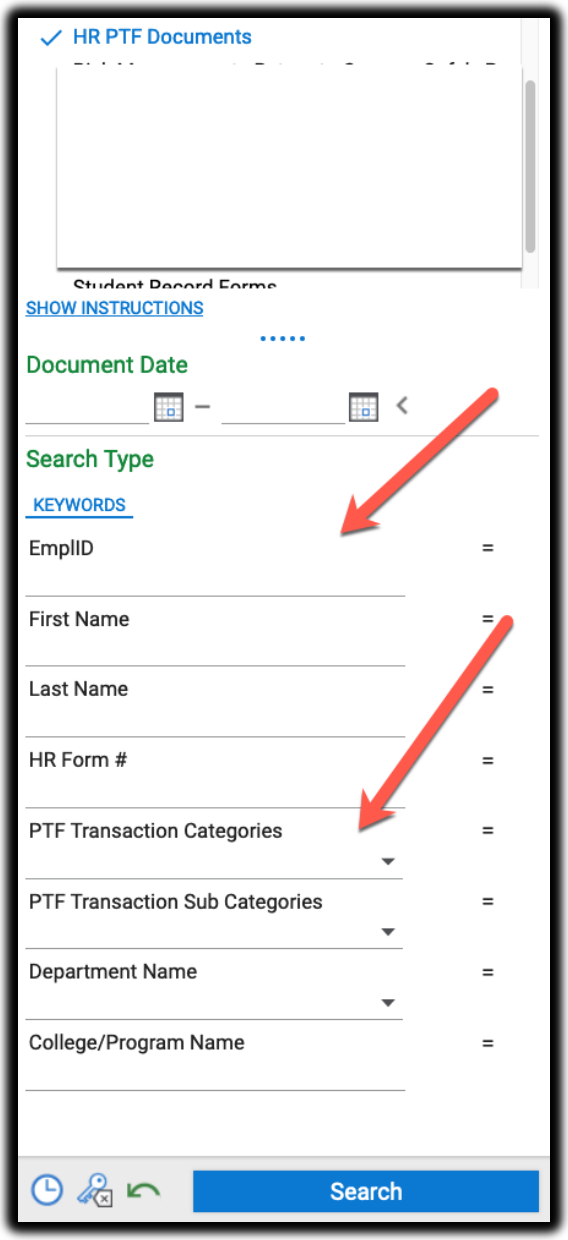
5. To access the **PTF Custom Query**, click on the "hamburger button" on the top left and click **Custom Queries**:



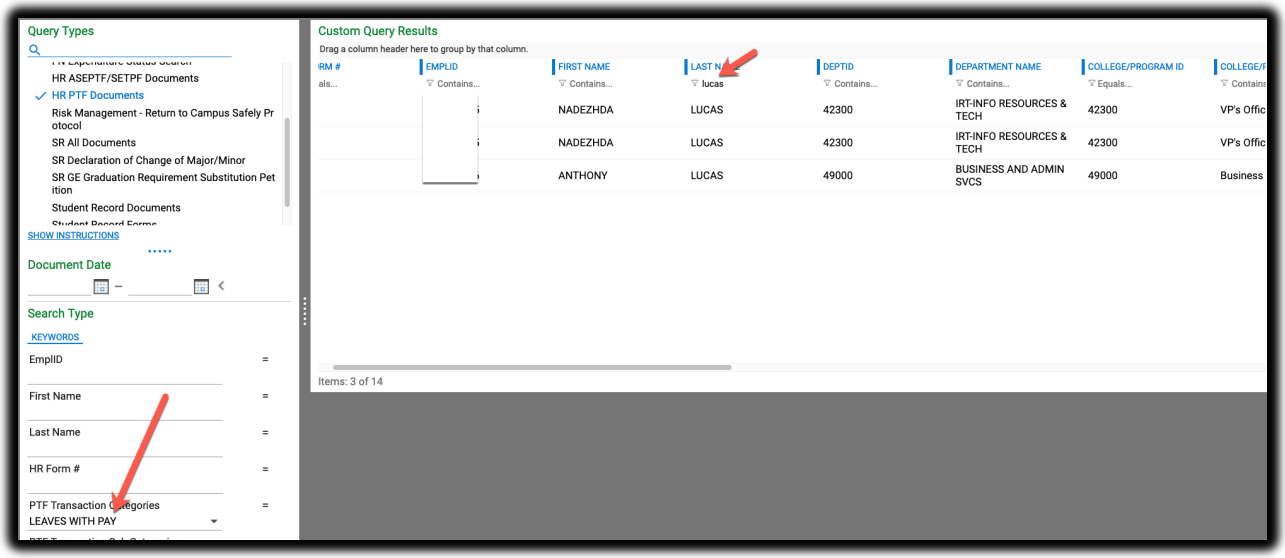
6. Click on **HR PTF Documents**:



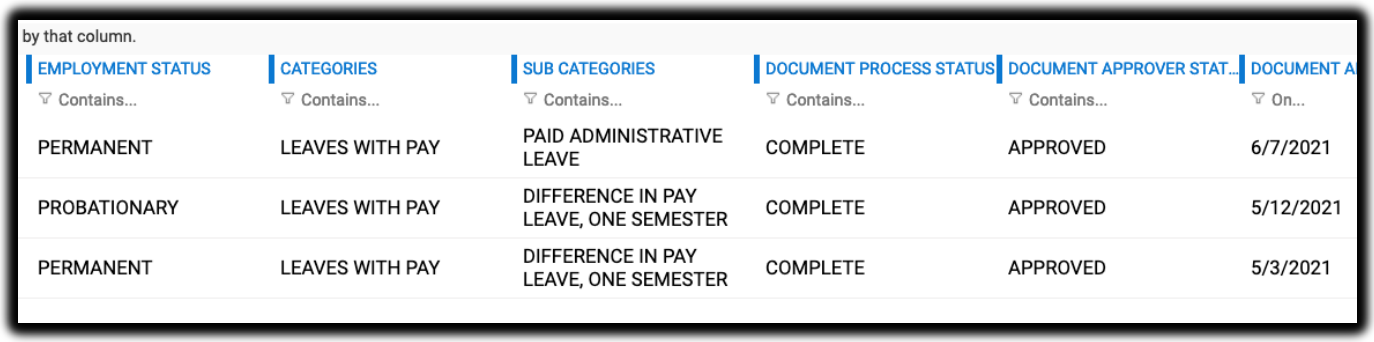
7. There are various Search options. Choose how you want to search and click **SEARCH**:



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



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
Contains...	Contains...	Contains...	Contains...	Contains...	On...
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