

Quick Reference: OnBase-Performance How to View Activity Report for Direct Reports

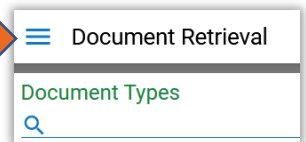
- 1) Click a link below to navigate to Clemson HR's Staff Performance Management Process
Employees: <https://www.clemson.edu/human-resources/current-employees/performance/staff.html>
Supervisors: <https://www.clemson.edu/human-resources/supervisors/managing-performance/staff.html>
- 2) Under Related Links on the right side of your screen, click "Access OnBase-Performance."

Related Links:

- Access OnBase-Performance
- Employee Performance Management Training
- Performance Rating Levels (PDF)
- Staff Performance Management Policy

- 3) Login using your Clemson credentials and Duo.

- 4) In the top left of your screen, click the three lines beside "Document Retrieval."



Document Retrieval

Document Types

- 5) In the Document Retrieval Menu, scroll down to Reporting Dashboards, click "Gallery."

USER

- Trash Can
- Locked Objects

REPORTING DASHBOARDS

- Gallery

- 6) When the Gallery menu appears, click the greater than sign next to "Shared With Me" and then click "PFM – Activity Report" to see where the forms of your direct reports/their direct reports are in the performance management cycle.



Reporting Dashboards

Gallery

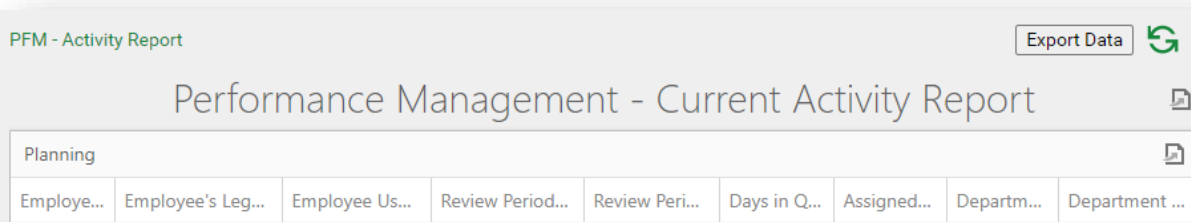
- Public Items
- Shared With Me

Public Items

Shared With Me

PFM - Activity Report

- 7) To view in an Excel spreadsheet, click the page with arrow icon in the top right corner below the green circling arrows.



PFM - Activity Report

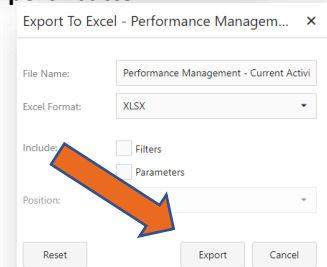
Export Data

Performance Management - Current Activity Report

Planning

Employee...	Employee's Leg...	Employee Us...	Review Period...	Review Peri...	Days in Q...	Assigned...	Departm...	Department ...

- 8) On the dropdown, click "Export to Excel" and when the pop-up box appears click the "Export" button.



Export To Excel - Performance Managem... x

File Name: Performance Management - Current Activi

Excel Format: XLSX

Include: Filters Parameters

Position: [Dropdown]

Reset Export Cancel

- 9) The Excel spreadsheet will have separate tabs for Planning, Performing and Monitoring, Evaluation along with Queue breakdown and totals.

Important Note: In the **Performing and Monitoring** tab each form is listed **twice** because there are **two assigned users** during this phase of the performance cycle. In the Planning and Evaluation tabs forms are only assigned to one user at a time.