

## Quick Reference: OnBase-Performance How to View Queue Status for a Form

- 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."

- 3) Login using your Clemson credentials and Duo.

**Related Links:**

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

- 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 – Performance Queue Status" to see where the form 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
  - PFM - Performance Queue Status

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

PFM - Performance Queue Status

Export Data Parameters

PFM - Performance Queue Status

Review Form

Content Name	Queue Name	Assigned User	Employee Username	Rater Name	Reviewer Name	Performa...	Department #
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- 8) On the dropdown, click "Export to Excel" and when the pop-up box appears click the "Export" button.

- Export To PDF
- Export To Image
- Export To Excel

Export To Excel - Performance Managem...

File Name: Performance Management - Current Activi

Format: XLSX

Include:  Filters  Parameters

Position:

Reset Export Cancel

- 9) The Excel spreadsheet will have 8 columns that you can filter/search to find a specific form. The Assigned User column gives username of the person who has the form in their queue.  
**Important Note:** Forms in the **Performing and Monitoring** queue are listed **twice** because there are **two assigned users** during this phase of the performance cycle.