

Designated users from each department/unit can upload performance evaluations to OnBase. If a designated user needs access, please **contact Human Resources at askhr@louisville.edu** and a ticket will be submitted for the designee to gain access. Follow the steps below to upload and retrieve performance evaluations on the web version of OnBase.

1. Go to https://onbase.louisville.edu and log in using UofL userID and password.



2. Click on the Menu icon = then **Document Retrieval**.





3. Click on Import Document from menu.

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Document Retrieval		OnBase
DOCUMENT Document Retrieval	Document Types	
Custom Queries New Form Import Document	CTL - AJ Docs CTL - AP Docs CTL - JV Docs	
Batch Indexing Documents Checked Out	FI - PROCARD FI - Procard Additional Items FI - Procard Card Sign-Out Logs	
WORKFLOW Open Workflow	FI - Procard Event Attendees FI - Procard Monthly Activity Report FI - Procard Monthly Activity Report	

- 4. Click on **Document Type Groups** and select **HR-Performance**. Make sure the following fields in the Import Settings are populated with the following:
 - > Document Type: **HR Performance Evaluation**
 - File Type: PDF (.???)
 - Note: If you do not see this group, you do not have access to upload the evaluations for your Supervisory Organization and you should contact askhr@louisville.edu for access.
- 5. Enter in data for the following required fields: *Employee ID, (HR) PA Year, (HR) PA Score,* (HR)Type of Review and (HR) Completion Date. Note: the abbreviation *PA* stands for Performance Evaluation. 2023 should be entered in the *(HR) PA Year* field.

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Document Types		Document Types
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6. Information should pull directly from system to populate the rest of the fields, if it doesn't, please enter the department number.

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7. Go to the top of the menu and click **Browse** under **Select File** and import/upload the evaluation for the employee you have specified.



8. Your document will populate in the window and then select **Import** at the bottom of the page.

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10/31/2019			Job/Classification	/Title		Department		
KEYWORDS	I		TEST TEST					
Employee ID	^		Manager/Supervi	sor Name & Title		Review Period (Fro	om, To)	
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2019			Review Date	New Hire		Provisional	Other	
(HR) PA Score O OUTSTANDING			1251					
Last Name			Purpose The purpose of the	Performance Evaluati	ion is to reflect or	the employee's job perform	pance and conduct for the review period and	
First Mana			to set goals for the	upcoming year. This t	ool is to be used f	for interactive and continuou	is communication between supervisors and	
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HR - Pay Group			Flease complete ea	ch section of the form	T Delow. For addit	uonai mormation, piease see	e the <u>instructions</u> online.	
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(XXXXXXXXXXXX)			Section 1C: Section 1D:	Professional Cond Manager's Overall	uct Evaluation	Section 2B:	Development Plan	
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9. Once uploaded, you'll receive a message that it was Imported Successfully.

Select File		Document Queue (1)					
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HR - Performance Appraisal	~		UNIVERSITY	OF		Performance Evaluation	



- 10. To Retrieve/View the uploaded document, click on the menu icon = at the top left and select **Document Retrieval**.
- 11. Under **Document Types**, scroll to find **HR-Performance** or type in **HR-Performance** and select **HR Performance Evaluation**.

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Document Retrieval			
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- 12. Enter the criteria you wish to retrieve (e.g., employee ID number, name, etc.).
- 13. If updates need to be made to the document, right click on the document, make the updates and click **Re-Index**.

Document Retrieval			OnBase
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(HR) Type of Review ANNUAL	•	v ut
Clear Keywords		
	Re-Index	Close

- 14. If you need to delete a duplication, please contact Human Resources at **askhr@louisville.edu** with the employee's name and employee ID number, and what information will need to be updated.
- 15. If you have technical questions regarding the uploading of Performance Evaluations to OnBase, please contact the ITS Help desk at **helpdesk@louisville.edu**.