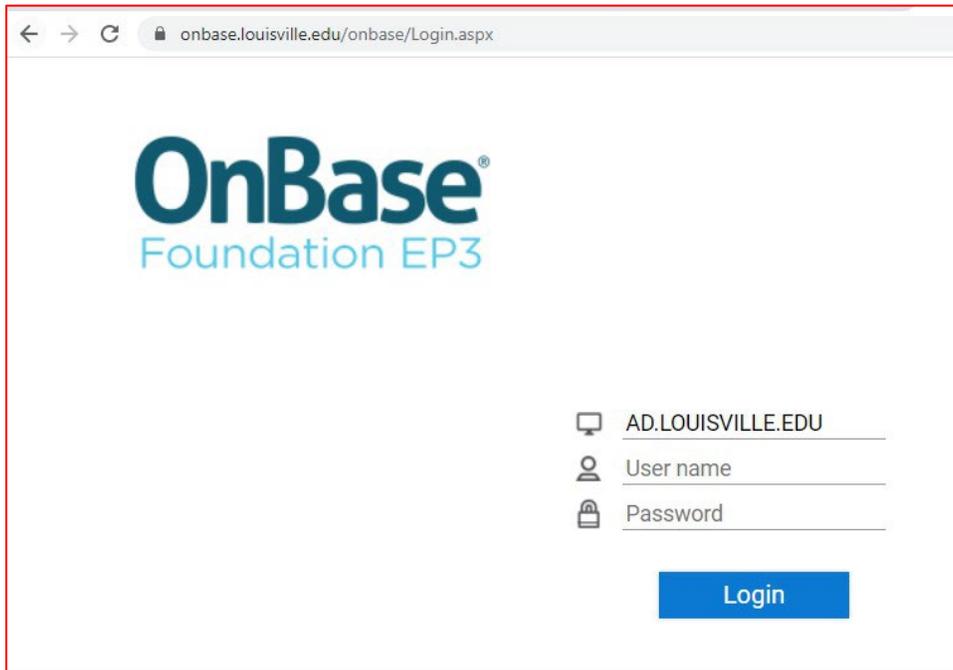


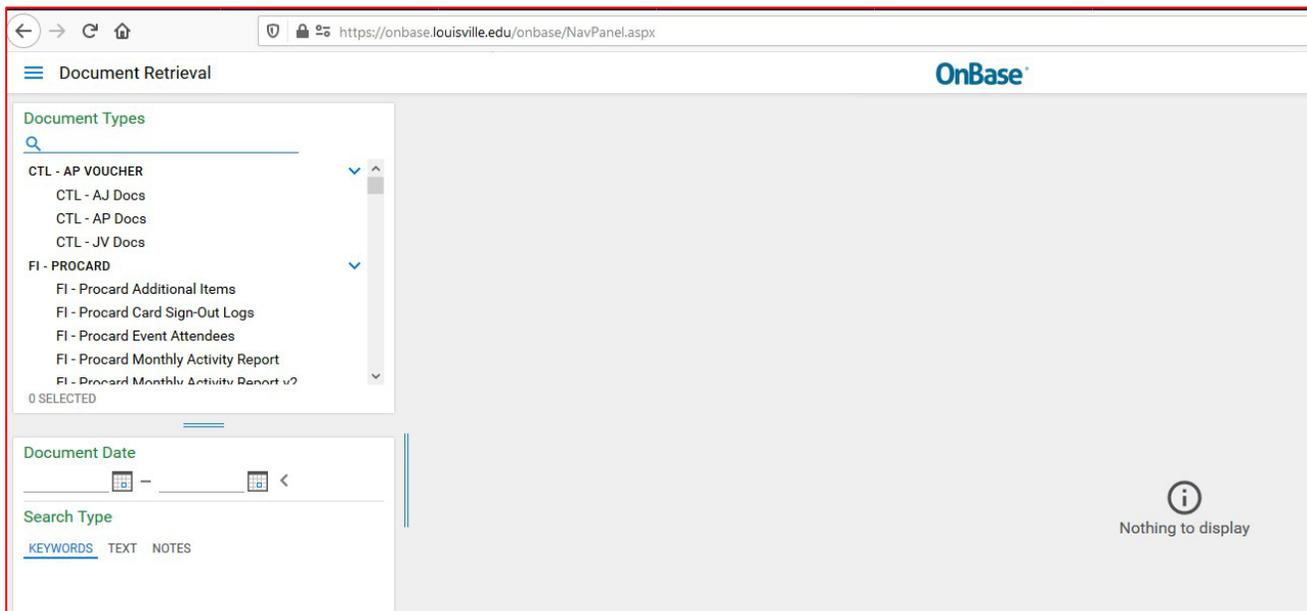
Designated users from each department/unit can upload performance evaluations to OnBase. If a designated user needs access, please **contact Human Resources at askhr@louisville.edu** and a ticket will be submitted for the designee to gain access. Follow the steps below to upload and retrieve performance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

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



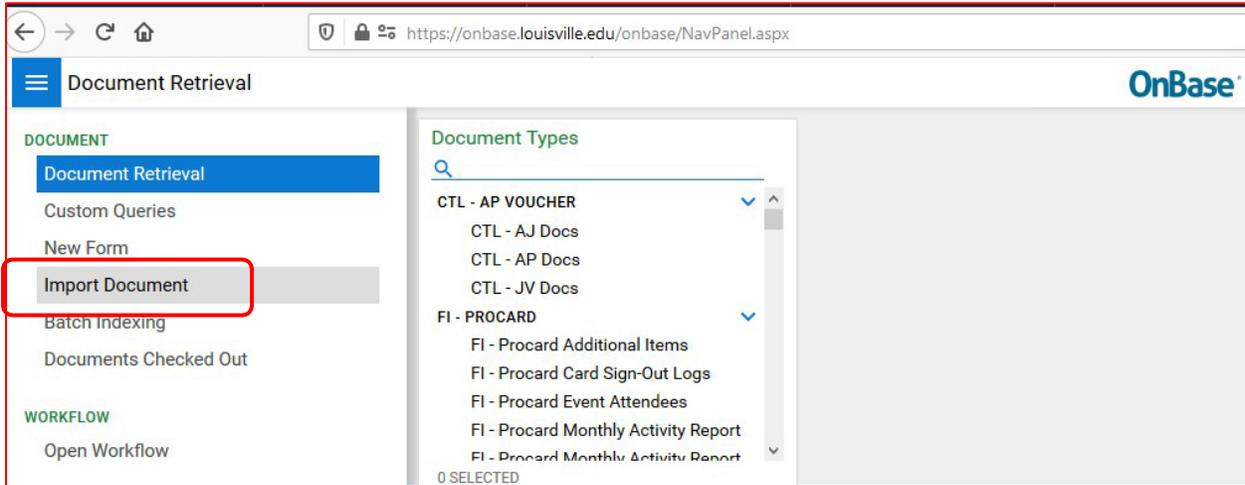
The screenshot shows the OnBase login page in a web browser. The address bar displays [onbase.louisville.edu/onbase/Login.aspx](https://onbase.louisville.edu/onbase/Login.aspx). The page features the OnBase Foundation EP3 logo. Below the logo, there are three input fields: a domain field containing "AD.LOUISVILLE.EDU", a "User name" field, and a "Password" field. A blue "Login" button is positioned below the password field.

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

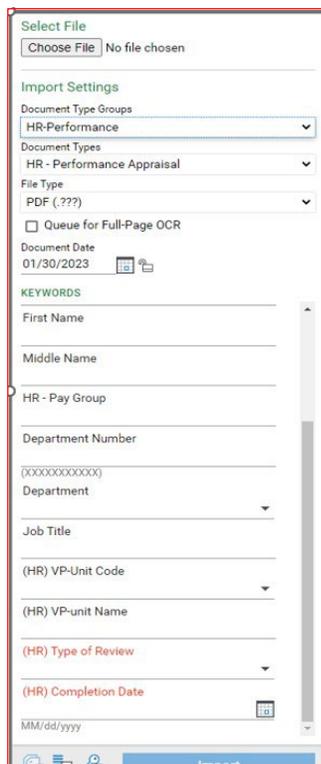


The screenshot shows the OnBase Document Retrieval page. The browser address bar displays <https://onbase.louisville.edu/onbase/NavPanel.aspx>. The page title is "Document Retrieval" and the OnBase logo is in the top right corner. On the left side, there is a "Document Types" section with a search bar and a list of document types under two categories: "CTL - AP VOUCHER" and "FI - PROCARD". Below this is a "Document Date" section with a date range selector. At the bottom left, there is a "Search Type" section with tabs for "KEYWORDS", "TEXT", and "NOTES". On the right side, there is a large grey area with an information icon and the text "Nothing to display".

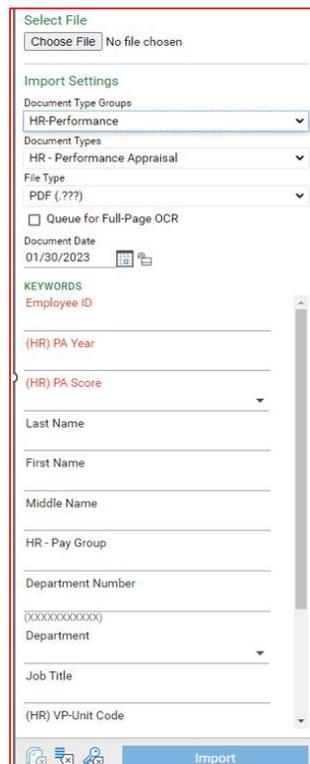
3. Click on **Import Document** from menu.



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.



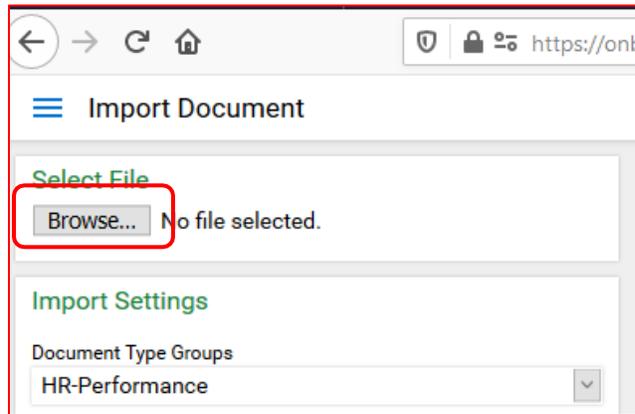
The screenshot shows the 'Import Settings' form in the OnBase web interface. The 'Document Type Groups' dropdown is set to 'HR-Performance'. The 'Document Types' dropdown is set to 'HR - Performance Appraisal'. The 'File Type' dropdown is set to 'PDF (.???)'. The 'Document Date' is set to '01/30/2023'. The 'KEYWORDS' section includes fields for 'First Name', 'Middle Name', 'HR - Pay Group', 'Department Number', 'Department', 'Job Title', '(HR) VP-Unit Code', '(HR) VP-unit Name', '(HR) Type of Review', and '(HR) Completion Date'. The 'Import' button is visible at the bottom.



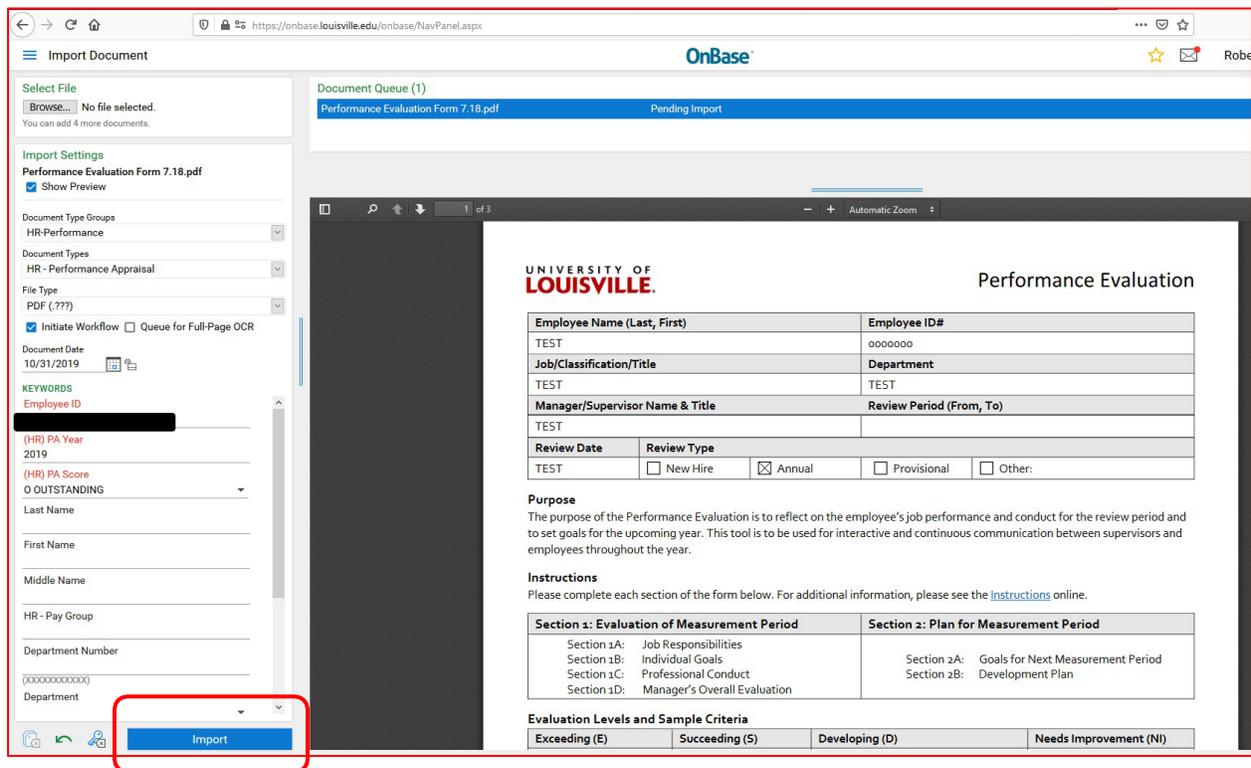
The screenshot shows the 'Import Settings' form in the OnBase web interface. The 'Document Type Groups' dropdown is set to 'HR-Performance'. The 'Document Types' dropdown is set to 'HR - Performance Appraisal'. The 'File Type' dropdown is set to 'PDF (.???)'. The 'Document Date' is set to '01/30/2023'. The 'KEYWORDS' section includes fields for 'Employee ID', '(HR) PA Year', '(HR) PA Score', 'Last Name', 'First Name', 'Middle Name', 'HR - Pay Group', 'Department Number', 'Department', 'Job Title', and '(HR) VP-Unit Code'. The 'Import' button is visible at the bottom.

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

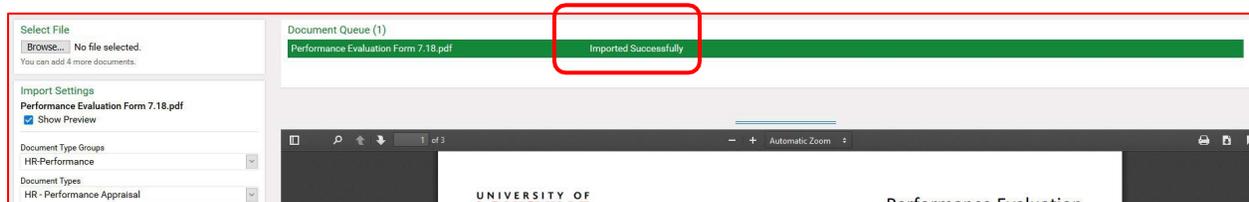
- Go to the top of the menu and click **Browse** under **Select File** and import/upload the evaluation for the employee you have specified.



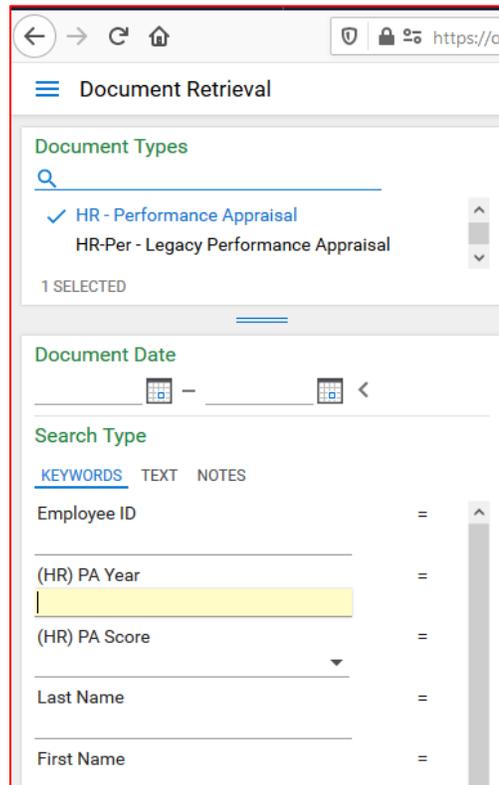
- Your document will populate in the window and then select **Import** at the bottom of the page.



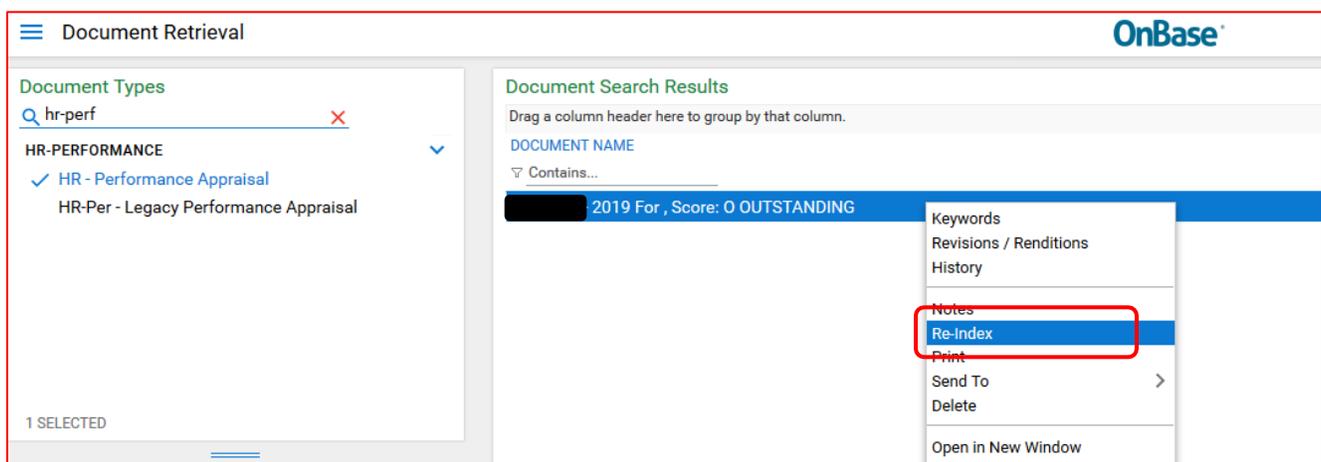
- Once uploaded, you'll receive a message that it was **Imported Successfully**.

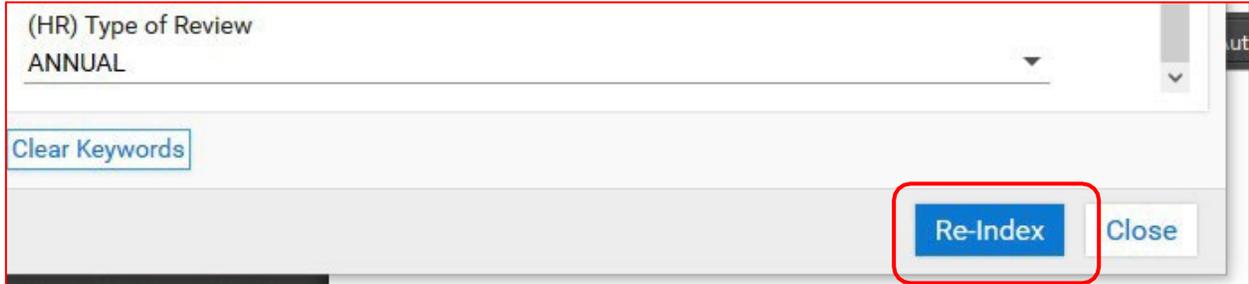


- To Retrieve/View the uploaded document, click on the menu icon  at the top left and select **Document Retrieval**.
- Under **Document Types**, scroll to find **HR-Performance** or type in **HR-Performance** and select **HR – Performance Evaluation**.



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





(HR) Type of Review  
ANNUAL

Clear Keywords

Re-Index Close

14. If you need to delete a duplication, please contact Human Resources at [askhr@louisville.edu](mailto: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](mailto:helpdesk@louisville.edu).