

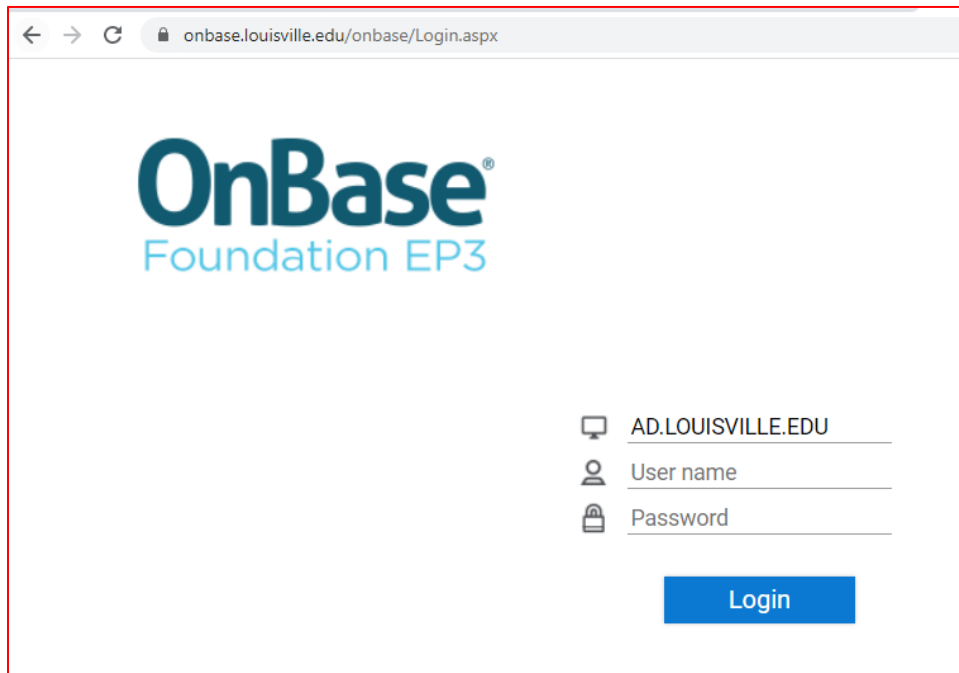
OnBase – Web Version (Performance Appraisals)

Please note – not everyone has the capability to upload the appraisals. Users were designated to be the uploaders/importers for the specific VP/Dean areas and/or specific department numbers. If you believe you should have access for your area and do not, please email hadmin@louisville.edu with the area you should be responsible for and we will take a look into your inquiry. A ticket will need to be submitted by Human Resources to give any access to the Performance Appraisal area.

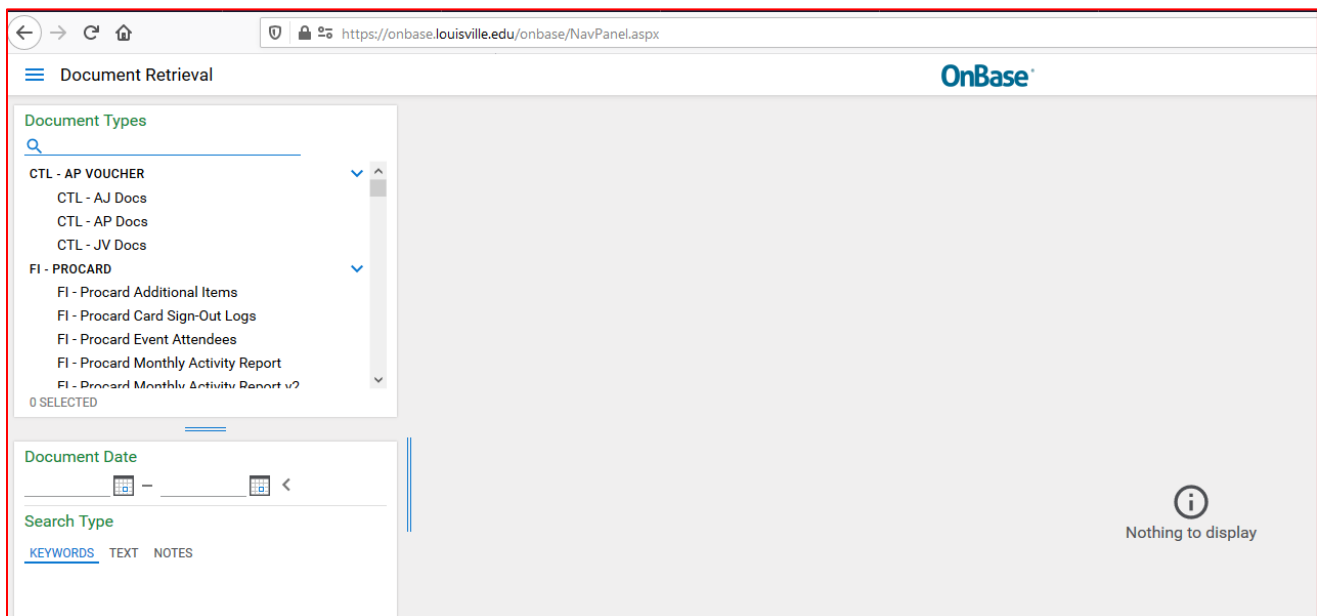
Below is how you would upload and retrieve performance appraisals on the web version of OnBase.

Upload Performance Appraisals to OnBase – Web Version:

1. Click on <https://onbase.louisville.edu> and login with UofL userID and password (same as ULink info).

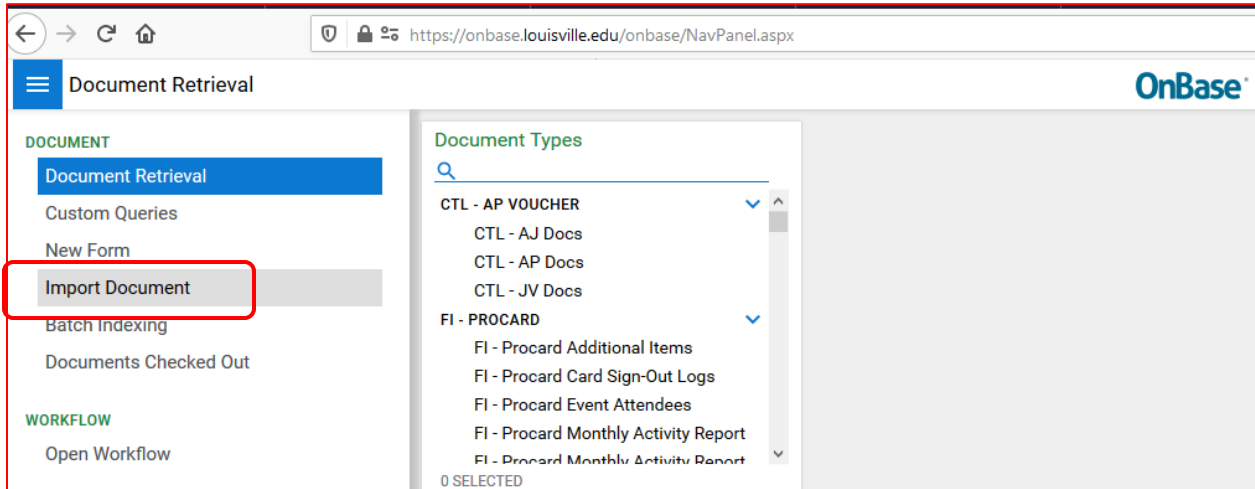


2. Click on Menu icon  next Document Retrieval.



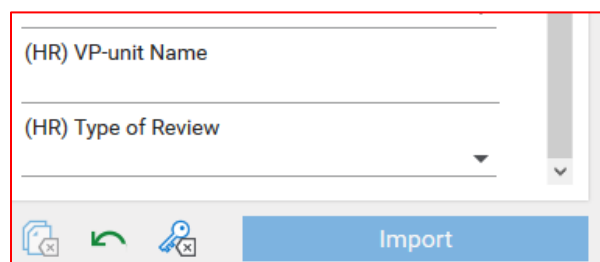
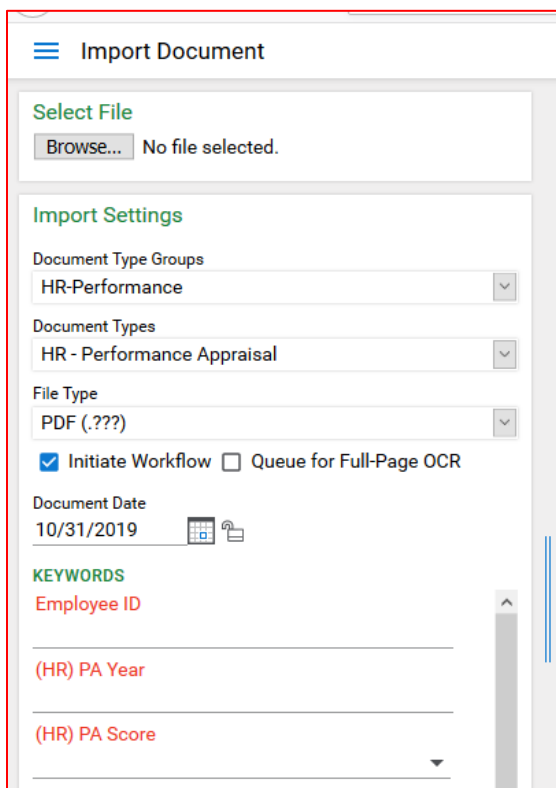
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3. Click on Import Document from menu.



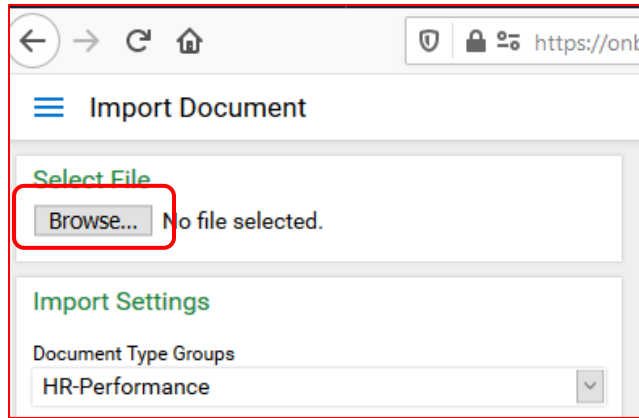
4. Click on Document Type Groups and select **HR-Performance**. If you do not see this group, you do not have access to upload the appraisals for your VP/Dean code or specific department number.
 - Document Type: **HR – Performance Appraisal**
 - File Type: **PDF (.???)**
5. Enter Keywords: **Employee ID, (HR) PA Year, (HR) PA Score** – dropdown menu. Information should pull directly from system, if it doesn't please at least enter the department number. Towards the bottom of this menu, you have the option to do the **Type of Review**, please select the appropriate item.

(bottom of menu)

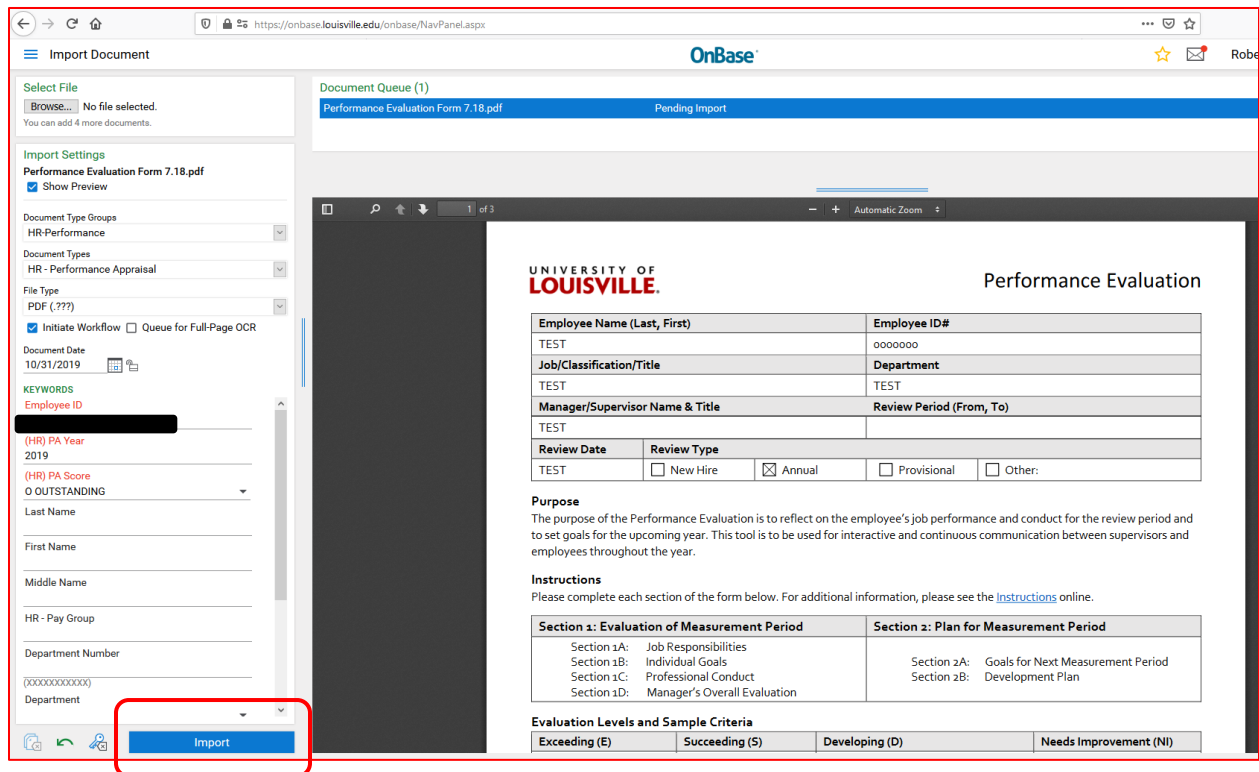


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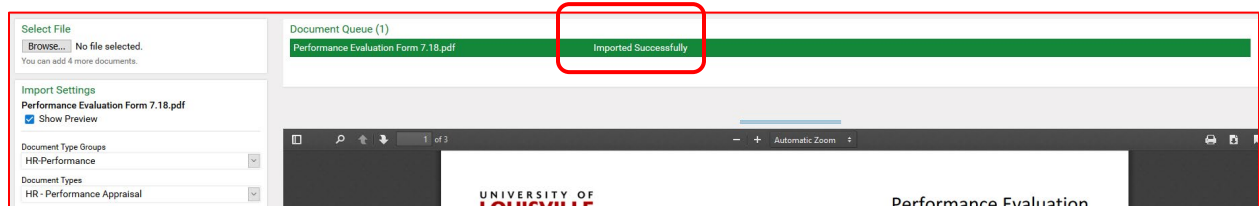
- Go to top of menu and click on **Browse** under **Select File** and import/upload the appraisal for the employee you have specified.




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

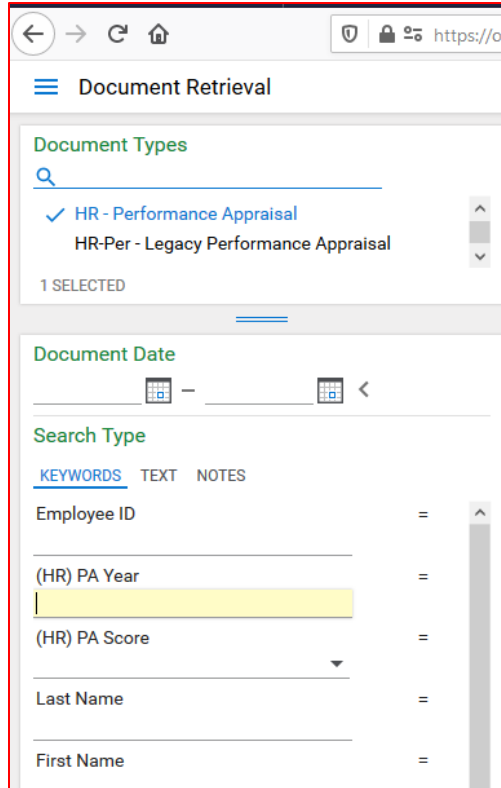


- Once imported, you'll receive a message that it was **Imported Successfully**, replacing Pending Import.

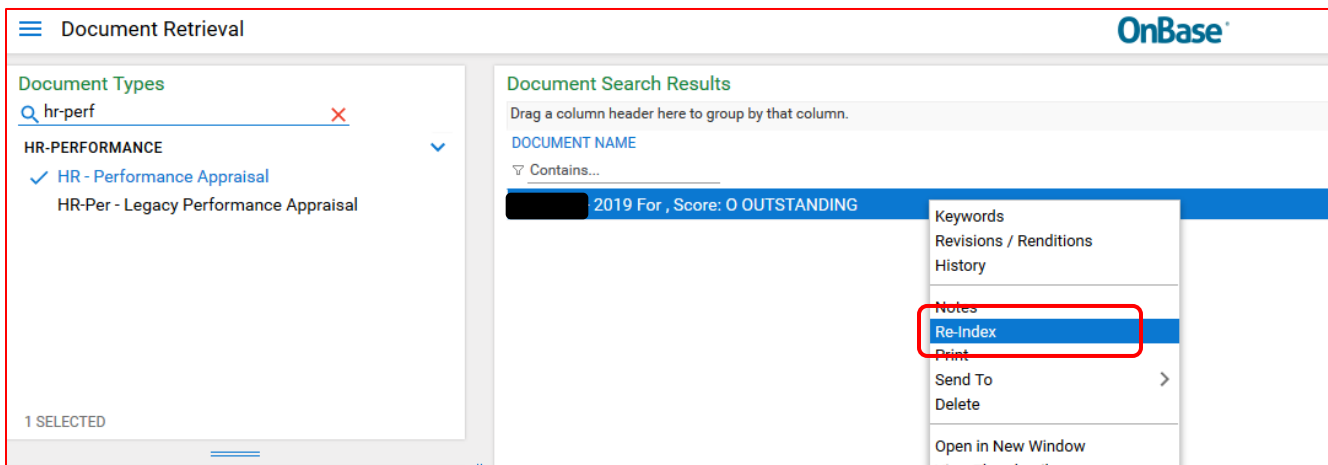


OnBase – Web Version (Performance Appraisals)

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

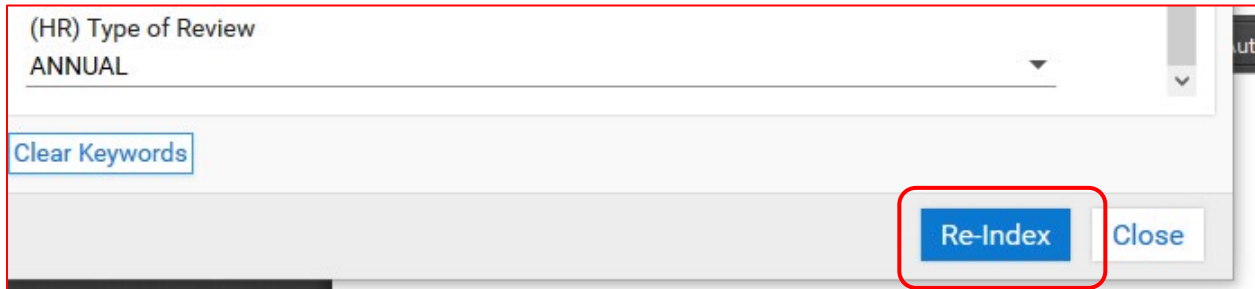


- Please input the criteria you wish to retrieve; employee ID number, name, etc...
- If you realized that you put the incorrect score or department number pulled incorrectly, etc., you can right click on the document to correct.



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13. Make sure to select **Re-Index** when completed.



The screenshot shows a web interface for performance appraisals. At the top, there is a dropdown menu labeled '(HR) Type of Review' with 'ANNUAL' selected. Below this is a 'Clear Keywords' button. At the bottom right, there are two buttons: 'Re-Index' and 'Close'. The 'Re-Index' button is highlighted with a red rectangular box.

14. If you need to delete a duplication, please send an email hradmin@louisville.edu with the employee name and employee ID number. Please specify if there is a difference on what document to delete, score or incorrect document, etc. We do not want to guess on which item to delete.

15. If you have any questions regarding the submission of Performance Appraisals to OnBase, please email hradmin@louisville.edu.