

PERFORMANCE NOTES FOR EMPLOYEES

The following instructions will walk you through how to use the Performance Notes tool as a UF employee. Entering Performance Notes is a way to keep notes about your performance and track specific events between Check-ins. These notes are for your reference and can only be accessed by you. There is no requirement to use Performance Notes.

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Human Resources > Self Service > UF Engaged > Performance Notes

ADDING A NEW PERFORMANCE NOTE

1. Click Add a New Note button.

My Performance Notes	
✓ Instructions Performance Notes is a tool for you to keep personal notes about your performance and to track sy quarter. Performance Notes should be used as a resource when preparing for Quarterly Check-ins, they are no longer useful. The content of Performance Notes, and any attachments, will only be ac- entered the information.	pecific events during the and may be deleted after cessible to the user who
To enter a performance note, select the Add a New Note button. To edit or access the details of an existing list of existing Performance Notes will be listed. Then, select the Performance Note subject that you wish t filtered by entering a Starting Date in the Search Criteria box, then selecting the Search button.	g note, select Search and a o view or edit. The list can be
Notes From 🔛 Through	ŧ
Search Add a New Note	

2. On the Add/Update Notes page, type a Subject for your note. It is recommended that the Subject be a key word or phrase that will remind you of the content of the note.

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Performance Notes - Add/Update	Notes
 Instructions 	
n Engaged	will only be accessible to the user who entered the information
r more information on using Performance Notes, visit	http://training.bc.ubecaule.to.the.doct.who.chic.co.ube.information.
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Add Performance Note	
Applications	
Applications	
	Created 07/25/2024 1:06PM
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Note Text	星 郡





3. In the Note Text section, enter specific details about your performance, successes, and events.

	Updated By Documents	
Subject	Completed Month-long Assignment	
Note Text		ą
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It is recommended that in the **Note Text** section you include any and all relevant information about the **Subject**. You can enter as much or as little as you would like, as long as it will help you remember the achievement or interaction as you complete the Check-in Self-Assessment. Some examples of interactions that might be recorded include:

- Large projects that you have completed
- Descriptions of team projects that you participated on
- Positive conversations held between you and leaders, colleagues, and customers
- Accomplishments or awards that you have received
- 4. Click the Save button.



5. Click the **Return to Performance Note Selection** link. Notice that the note you just created is listed on **My Performance Notes** by the **Subject** name.

Save
Return to Performance Note Selection



ADDING TEXT OR EDITING AN EXISTING PERFORMANCE NOTE

1. Click on any **Performance Note** to add text or edit the note.

✓ Instructions Performance Notes is a tool for you to keep personal notes about your performance and to track specific events during the guarter. Performance Notes should be used as a resource when preparing for Quarterly Check-ins, and may be deleted after they are no longer useful. The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information. To enter a performance note, select the Add a New Note button. To edit or access the details of an existing note, select Search and a list of existing Performance Notes will be listed. Then, select the Performance Notes button.				
Selection Criteria				
Search Add a New Note Documents				
野 Q 1-1 of 1 マ				
Select Created				
	Completed Month-long Assignment	07/25/2024 1:06PIM		
Select All Delete	Deselect All			

2. To add to or edit a note, click in the **Note Text** field and make your intended changes or additions.

Performance Notes - Add/Update Notes	
Vinstructions	
The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information.	
For more information on using Performance Notes, visit http://training.hr.ufl.edu/resources/ufengaged/ufengagedemployees/index.html	
Selected Performance Note	
Applications	
Created 0//25/2024 1:00m/il	
Last Update	
Updated By	
Documents	
Subject Completed Month-long Assignment	
Note Text I completed a month-long assignment.	90

3. Click the Save button.

l
Save
Return to Performance Note Selection



UPLOAD DOCUMENTS TO A NOTE

 In addition to saving text, you can upload relevant Documents. While on the Add/Update Notes page, click on the Documents button. Please note that while you may choose to upload documents as a memory aid and/or for your reference when completing your UF Engaged Check-Ins, you will not be able to attach documents to the actual Check-ins themselves.

Applications		
Create	d 07/25/2024 1:06P or Doe Jane	РΜ
Last Updat	e	
Updated B	<u>v</u>	

2. Document storage is facilitated through OnBase. Click the highlighted Upload icon.

Tolder type" No folders found.	1	OnBase	Exit
No folders found.	Lolder Type		
	No folders found.		
Select Folder		Select Folder	
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3. Click the **Choose File** button.





	Chibabe	Exit
Select File Choose File No file chosen Import Settings Document Types HRS UF ENGAGED Employee Note File Type Image File Format (.???) Document Date 06/20/2019 Employee UFID 12345678	• • • Select File or Drag & Drop Files	
COMPLETED+A+MONTH+LONG+PROJECT Created Date/Time String 2019-06-20-16.02.54.000000 UF Engaged Security Keyword ALBERTGATOR@UFLEDU		

4. Navigate to and select the **file** you would like to upload.

	OnBase	e'	Exit
Select File Choose File No file chosen Import Settings Document Types HRS UF ENGAGED Employee File Type Image File Format (.???) Document Date 06/20/2019 Employee UFID 12345678 Subject COMPLETED+A+MONTH+LO Created Date/Time String 2019-06-20-16.02.54.000000 UF Engaged Security Keyword ALBERTGATOR@UFL.EDU	© Open ConBase © Open Coganize → New Folder © OneDrive © Pictures © Pictures © Saved Games © Saved Games © Searches © Videos © Videos © This PC © Jobjects © Documents © Documents © Documents © This not be the folder © Desktop © Documents © Documents © This not be the folder © Documents © Documents © Documents © This not be the folder © Documents © Documents © Documents	Select a file to preview.	Exit
ſ <u>c</u> ∽ <i>&</i>	Import		

5. Note that in the Document Queue, it states "Pending Import". Click the **Import** button.



	OnBase [®]	Exit
Select File	Document Queue (1)	
Choose File No file chosen	Final Project.xlsx Pending Import	×
You can add 4 more documents.		
Import Settings		
Final Project.xlsx		
Show Preview		
Document Types		
HRS UF ENGAGED Employee Note		
File Type		
MS Excel Spreadsheet (.xls)		
Document Date 06/20/2019		
KEYWORDS		
Employee UFID	Droview not evoilable for the calestad file	
12345678	Fleview flot available for the selected file.	
Subject		
COMPLETED+A+MONTH+LONG+PROJECT		
Created Date/Time String		
2019-06-20-16.02.54.000000		
UF Engaged Security Keyword		
ALBERTGATOR@UFL.EDU		
import		

6. Note that in the Document Queue, the document shows as "Imported Successfully". To see all imported documents for this note, click the red highlighted **Folder** icon.



7. You can see all of the documents that you have uploaded to this Note in the folder page. Click the arrow to





display them.

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Folder Type: Dynamic Fundameter Type: Dynamic Fundameter Type: Dynamic Fundameter Type: Dynamic Typ	Document Edit Process Previous Document	Next Document
Document List C < <u>CHILD FOLDERS</u> RELATED FOLDERS C C Circk	Loading HRS UF ENGAGED Employee Note - Created by MS Word Document (Depending on your Operating System settings, th application.)	In 2019-06-27-12:37.04.000000 his document may open externally in the native No Notes Found Add Note
No items to display	Revision 1 of 1	0 Note(s)

8. Your documents will appear in the **Document List**. Depending on how many documents you have uploaded, you may need to scroll down to view them all.

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Folder Type: Dynamic Employee Notes for UFID 12345578	
Document List C DOCUMENT NAME V V Containa	~
HRS UF ENGAGED Employee Note - Created by on 2019-06-27-12.37.04.000000 - PROJECT	
HRS UF ENGAGED Employee Note - Created by on 2019-06-27-12.37.04.000000 -	9
	~
No items to display	

9. To return to the Note, click the highlighted **Exit** button.





• • •	OnBase Exit
Folder Type: Dynamic	Document Edit Process Previous Document Next Document Image: Additional state of the s

10. At this point you can either enter more text and **Save** or return to the My Performance Notes menu by clicking the **Return to Performance Note Selection** link.

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Save	
Return to Performance Note Selection	

Deleting a Note

1. If you ever need to delete a Note, click on the **check box** next to the note.

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quarter. Performance Notes quarter. Performan- they are no longer entered the informa	15 a tool for you to keep personal notes about your performance are services should be used as a resource when preparing for Quarter useful. The content of Performance Notes, and any attachments, wittion.	of to track specific events during the y Check-ins, and may be deleted after II only be accessible to the user who						
To enter a performar list of existing Perfor filtered by entering a	ice note, select the Add a New Note button. To edit or access the details mance Notes will be listed. Then, select the Performance Note subject the Starting Date in the Search Criteria box, then selecting the Search button search button selecting the Search button selecting the Search button search button selecting the Search button selecting the Search button set of the Search selecting the Search button selecting the Search button set of the Search selecting the Search button selecting the Search button set of the Search selecting the Search selecting the Search button set of the Search selecting the Search selecting the Search button set of the Search selecting the Search selecting the Search button set of the Search selecting	of an existing note, select Search and a lat you wish to view or edit. The list can be in.						
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Select	Subject	Created						
	Completed Month-long Assignment 07/25/2024 1:06PI/							
Select All	elect All Deselect All							
Delete								

2. With the Note(s) selected that you would like to delete, click the **Delete** button.





To enter a performance or list of existing Performant filtered by entering a Sta	note, select the Add a New Note button. To edit or access the details o cc Notes will be listed. Then, select the Performance Note subject tha tring Date in the Search Criteria box, then selecting the Search button	f an existing note, select Search and a t you wish to view or edit. The list can be				
Selection Criteria						
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E Q		1-1 of 1 👻				
Select	Subject	Created				
Z	Completed Month-long Assignment 07/25/2024 1:06PM					
Select All	Deselect All					
Delete	J					

3. Confirm by clicking the **OK** button.



SEARCHING FOR A NOTE

1. If you have a number of Notes saved, you can search for Notes by **Created** date or date range. Click on the Notes From **calendar icon**.

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Notes From	

2. Select the first date that you would like displayed in your search.



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			Ca	alend	lar		×	
Add a New	Ju	ıly		~	2024		~	
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ance Notes		1	2	3	4	5	6	
	7	8	9	10	<mark>1</mark> 1	12	13	
Subject	14	15	16	17	18	19	20	ated
	21	22	23	24	25	26	27	
Completed Month-long Assig	28	29	30	31	•			25/2024 1:06PN
Deselect All		<	CL	irrent	Date		>	

3. Click on the Through calendar icon.

Through	

4. Select the end date that you would like displayed in your search.

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		7	8	9	10	11	12	13
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		21	22	23	24	25	26	27
	07/25/2024 1:	28	29	30	31			
			<	CL	Irrent	Date		>

5. Click the **Search** button.

Selection Criteria		
1	Notes From 07/25/2024	Through 07/25/2024
Search	Add a New Note	Documents
our existing Performa	nce Notes	

6. Only the Notes created within your chosen date range will appear.

 ✓ Selection Criteria Notes From 07/25/2024							
Search Add a New Note Documents							
Select Subject Created							
	Completed Month-long Assignment 07/25/2024 1:06PM						

VIEWING ALL UPLOADED DOCUMENTS





1. From the My Performance Notes page, you can view all of the documents that you have uploaded for all Notes by clicking the **Documents** button.

2	Completed Month-long Assignment	07/25/2024 1	
Select	Subject	Created	
four existing Performance Notes			
Search	Add a New Note	Documents	
	Notes From 07/25/2024	Through 07/25/2024	
✓ Selection Criteria			

2. If you click any of these **Documents**, you will download them.

OnBase		
Document Search Results Drag a column header here to group by that column.		
DOCUMENT NAME	DOCUMENT DATE	
HRS UF ENGAGED Employee Note - Created by 12345678 on 2019-06-27-12.37.04.000000 - PROJECT	6/27/2019	
HRS UF ENGAGED Employee Note - Created by 123456787 on 2019-06-27-12.37.04.000000 - PROJECT	6/27/2019	
Items: 2		
Please Select an Item		