Quick Reference: OnBase-Performance
How to make Workflow Home Screen

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."

Related Links:
- Access OnBase-Performance
- Employee Performance Management

3) Login using your Clemson credentials and Duo.

4) In the top left corner of your screen, click the three lines beside "Document Retrieval."

Document Retrieval

Document Types

5) In the Document Retrieval Menu, click "Open Workflow."

✕ Document Retrieval

DOCUMENT
Document Retrieval
Custom Queries
New Form
Import Document
Documents Checked Out

WORKFLOW
Open Workflow

6) Click the arrow beside "Performance Management."

OnBase

LIFE CYCLE VIEW   WORK FOLDER

Combined Inbox

7) Click on "Planning."

Performance Management
  Planning (0)
  Performing and Monitoring (1)
  Evaluation (0)

8) Click the star with plus (+) sign to Add to Favorites.

9) In pop-up box, type Favorite Name (Planning will be prepopulated for you) and click "OK."

10) Look for X in top right of window. Click X to close out of that screen to see the OnBase home screen.

11) Click on the star in the top right near your username.

☰ Document Retrieval   **OnBase**   ⭐ 🗑 HART ⌄

Document Types
Q
CLE - PERFORMANCE MGMT
  PFM - Correspondence
  PFM - Employee Response
  PFM - Financial
  PFM - Performance Mgmt Planning Eval For

FAVORITES
+ Add to Favorites
Planning
Edit Favorites

12) Click on Edit Favorites

13) Click on the house icon to choose the Favorite you just created to be your home screen.

Edit Favorites   ✕

Planning   🏠 🗑

14) Click "Save and Close" to have this screen open as your home screen each time you log into OnBase. You will need to allow pop-ups.