

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 Unity Client.

If you do not currently have OnBase, you will need to install the Unity Client, which requires Microsoft Edge or Internet Explorer 11 and above. <https://onbase.louisville.edu/InstallUnity/UnityClientPROD.application> - When downloading, it may require Tier 1/tech support from your area if you do not have the permission to download. If you aren't sure if you have OnBase, type **Hyland Unity** in your Windows search bar at the bottom left of your computer. If the OnBase icon does not appear, you will need to install the application or use the web version. The web version of OnBase: <https://onbase.louisville.edu> may require certain installation prerequisites.

1. Once you have installed the *OnBase Unity Client*, you will need to log in using your UofL **user ID** and **password**. You must also be using the AD domain to get into OnBase, if you are using a different domain, this will unfortunately not work, so please make sure you are logged into an appropriate workstation.

Home / Employee Relations / Performance Appraisal

Performance Appraisal

Performance Appraisal

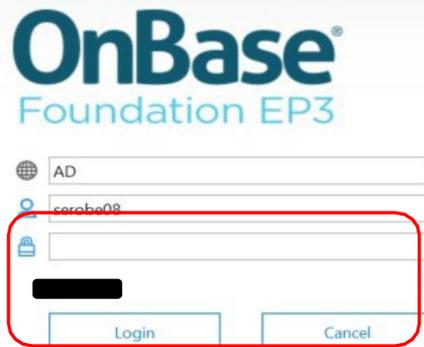
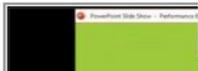
The performance appraisal process is a key component of the performance appraisal process.

Performance Appraisal

The Professional Development

- Understand how to
- Understand their role
- Understand how to
- Understand how to
- Learn how to coach
- How to work toward
- Know the guideline

If you are unable to attend



OnBase[®]
Foundation EP3

AD

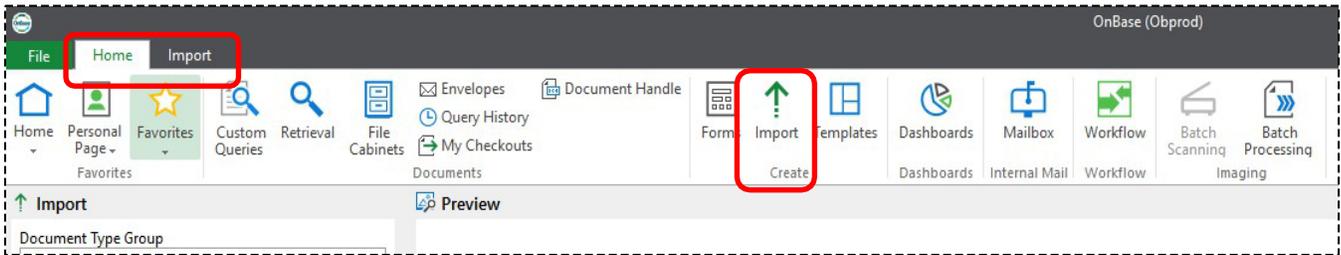
scorob08

[Redacted Password]

Login Cancel

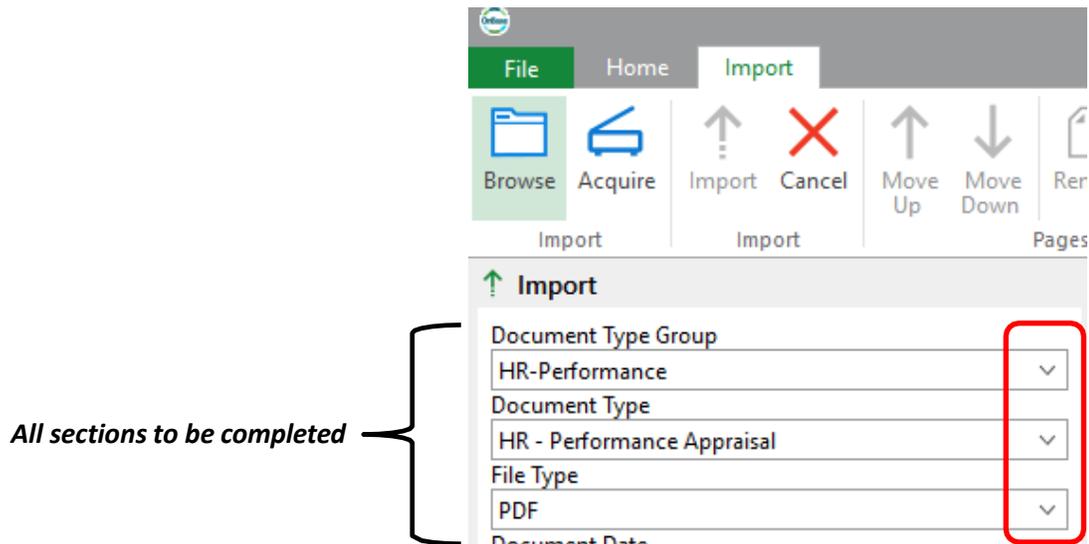
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Version 20.3.10.1000

2. From the **Home** tab click on the **Import** icon, this will open a new tab to import the documents.



3. Select from the drop-down arrows:

- **Document Type Group** - select **HR-Performance**
- **Document Type** – select **HR – Performance Evaluation**
- The **File Type** will auto-populate to **PDF**, but you can change this to **Image File Format** if using an OnBase scanner. See below for suggestions on **File Type** as this pertains to where the PAs are retrieved and then uploaded.
 - **Browse** – document will be a pdf, as it was previously scanned using a scanner or copier not linked to OnBase and saved on your computer. Select **PDF** for **File Type**.
 - **Acquire** – document will be scanned directly into OnBase with a scanner linked to OnBase, select **Image File Format** for **File Type**.
 - If unsure as to what the file type is, look at the extension of the document to be uploaded (i.e. .pdf, .jpeg, etc.).



4. Once the Document Type and File Type sections are completed, five required **Keywords** will appear: **Employee ID, (HR) PA Year, (HR) PA Score, (HR) Type of Review and (HR) Completion Date**. Please enter in the data for these fields as appropriate.
- The abbreviation **PA** stands for Performance Evaluation.
 - The fields not highlighted in red will auto-populate after the **Employee ID** has been entered.
 - **2023** should be entered in the **(HR) PA Year** field.
 - The **(HR) PA Score** will have a dropdown menu, please select the appropriate score.
 - The **(HR) Type of Review** will have a dropdown menu, please select the appropriate type: **Annual, Mid-Year, Provisional or New Employee Expectations**
 - The **(HR) Completion Date** use the pop-up calendar provided to enter date of when PA was reviewed

Keywords

Employee ID

(HR) PA Year

(HR) PA Score

O OUTSTANDING
N NEEDS IMPROVEMENT
S SUCCEEDING
G GOOD
V VERY GOOD
E EXCEEDING
D DEVELOPING
NI NEEDS IMPROVEMENT

(HR) Type of Review

ANNUAL
MID-YEAR
PROVISIONAL
NEW EMPLOYEE EXPECTATIONS

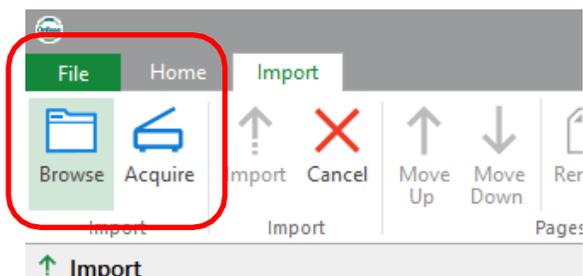
Import Cancel

(HR) Type of Review

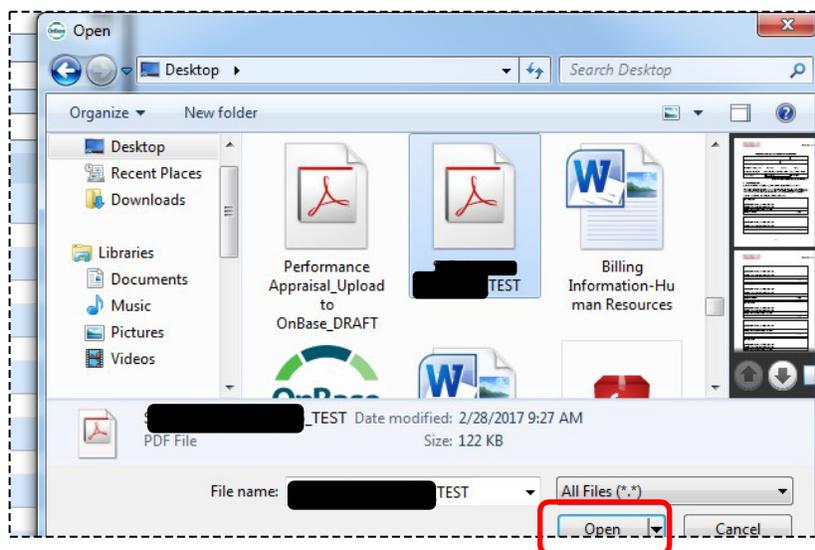
PROVISIONAL

(HR) Completion Date

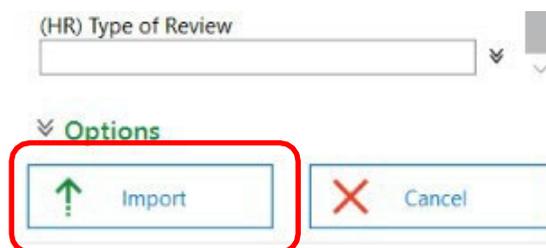
5. Once all fields are completed, you may click on **Browse** or **Acquire** referenced in #3.



6. Retrieve the document where you initially saved the performance evaluation on your computer; the document name does not matter as it will automatically change when uploaded.



7. Select **Import**.

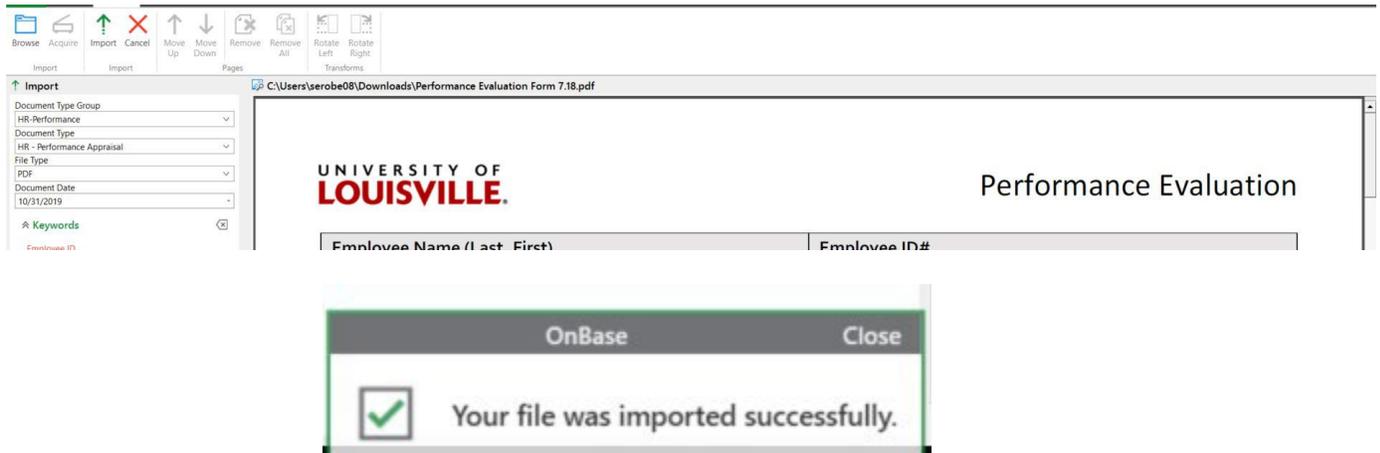


8. If **not** all **Keywords** are typed in when you select **Import**, an error box will appear. Please select **OK** and complete the missing field(s) and select **Import** again.



- The uploaded performance evaluation will be previewed in the window and once completed will be displayed into a new window. A notification will appear on the right bottom corner when your document has been uploaded successfully.

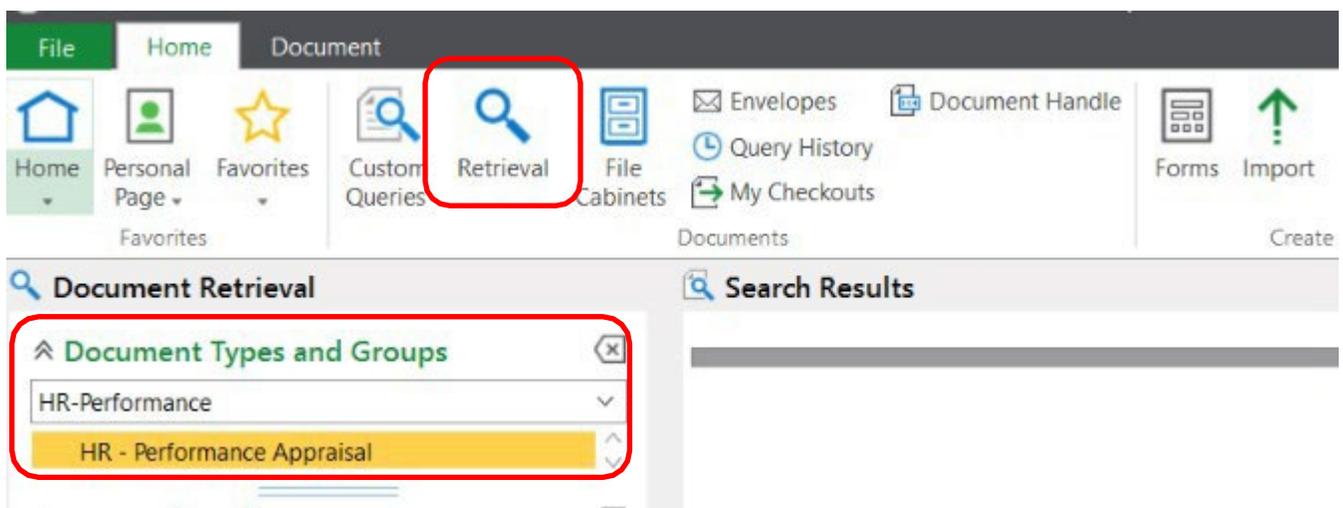
Employee ID – YEAR for Last Name,First Name Score:



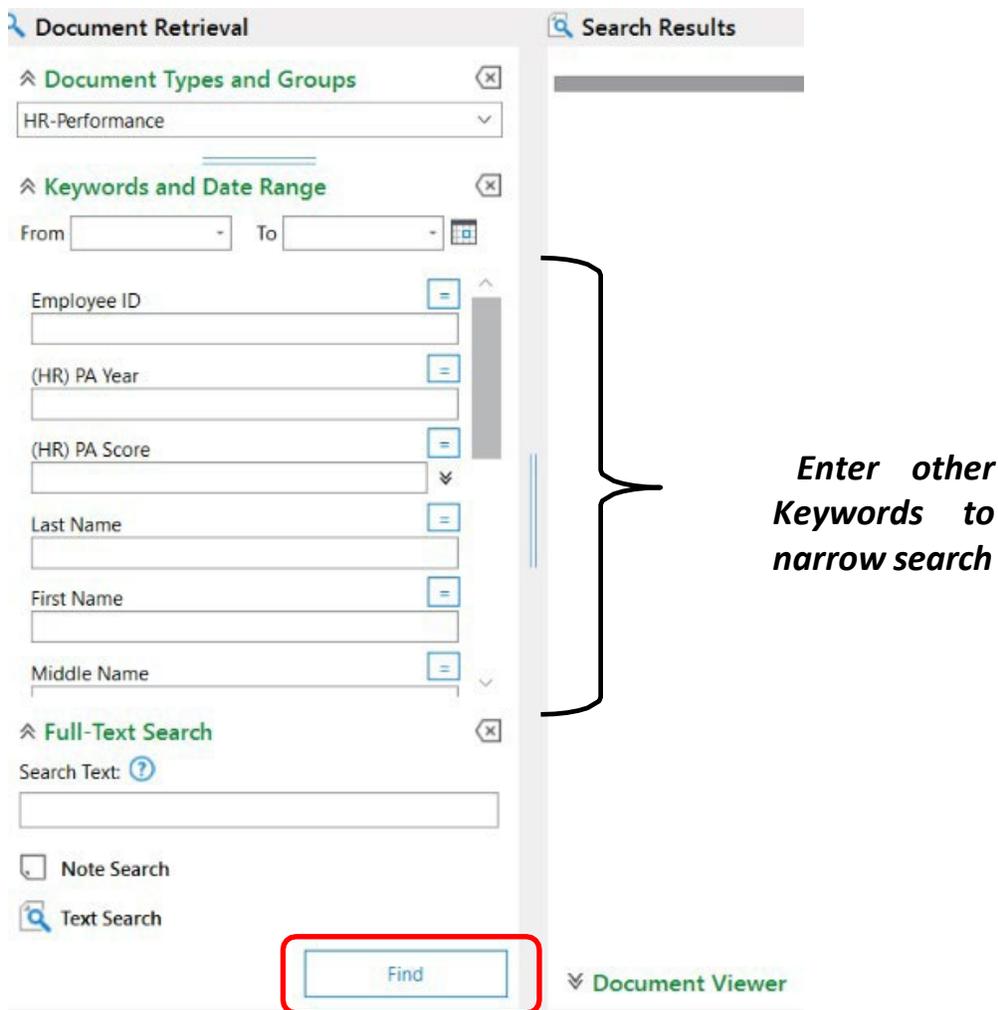
- The employee's performance evaluation is now in OnBase and you can proceed to upload the next performance evaluation.

View Scanned Performance Evaluations in OnBase:

- To view your scanned performance evaluations, please go to **Retrieval** under the **Home** tab, select **HR-Performance** from the drop-down menu and click on **HR – Performance Evaluation**.



12. Enter any keywords that you wish to search; employee ID, Year, Last Name, etc. Press enter on your keyboard or select **Find** located at the bottom.



Document Retrieval

Document Types and Groups
HR-Performance

Keywords and Date Range
From [] - To []

Employee ID []
(HR) PA Year []
(HR) PA Score []
Last Name []
First Name []
Middle Name []

Full-Text Search
Search Text: []

Note Search
 Text Search

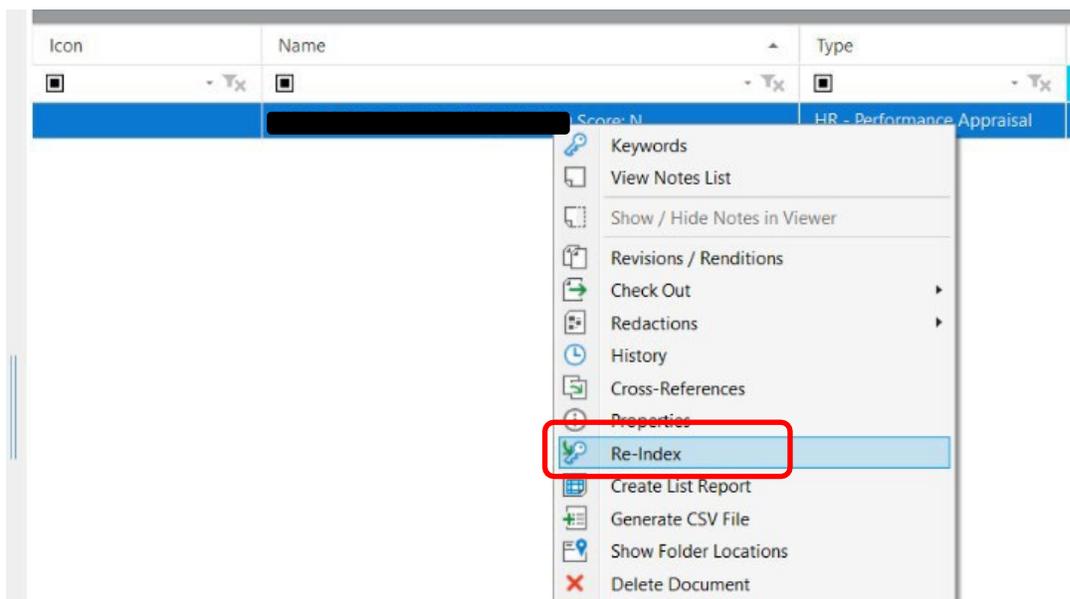
Find

Search Results

Enter other Keywords to narrow search

Document Viewer

13. If you have pulled your list from above and realize that the score was entered incorrectly, the wrong document uploaded, or duplicated PA entry, please **right click** on the document and select **Re-Index**.



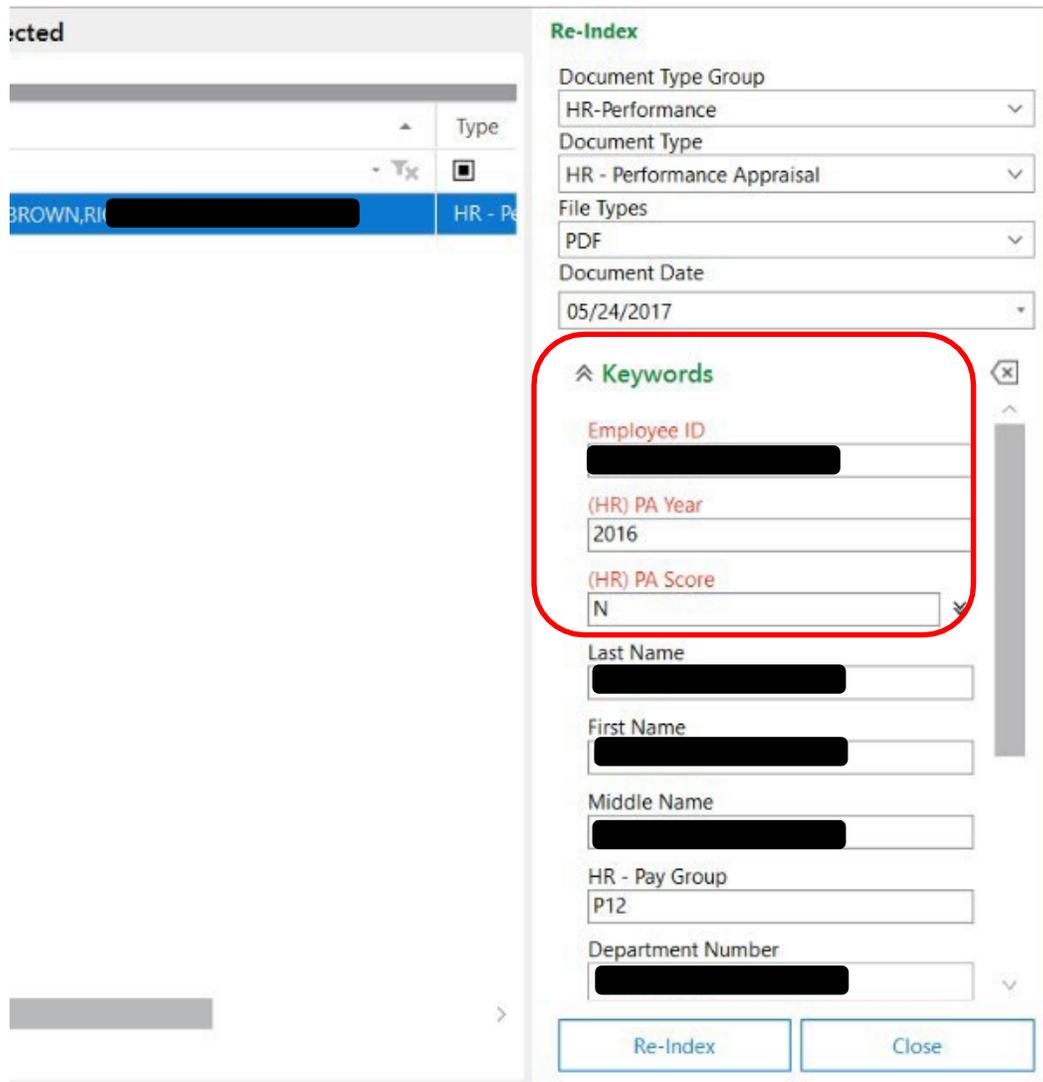
Icon	Name	Type
	[Redacted]	HR - Performance Appraisal

- Keywords
- View Notes List
- Show / Hide Notes in Viewer
- Revisions / Renditions
- Check Out
- Redactions
- History
- Cross-References
- Properties
- Re-Index**
- Create List Report
- Generate CSV File
- Show Folder Locations
- Delete Document

14. You can update the mandatory Keyword fields, then click on **Re-Index** at the bottom, for any errors.

If you need to delete a duplication, please contact Human Resources at askhr@louisville.edu with the employee name and employee ID number, and what information will need to be updated.

If you have technical questions regarding the uploading of Performance Evaluations to OnBase, please contact the ITS Help desk at helpdesk@louisville.edu.



Re-Index

Document Type Group
HR-Performance

Document Type
HR - Performance Appraisal

File Types
PDF

Document Date
05/24/2017

Keywords

Employee ID
[REDACTED]

(HR) PA Year
2016

(HR) PA Score
N

Last Name
[REDACTED]

First Name
[REDACTED]

Middle Name
[REDACTED]

HR - Pay Group
P12

Department Number
[REDACTED]

Re-Index Close