

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

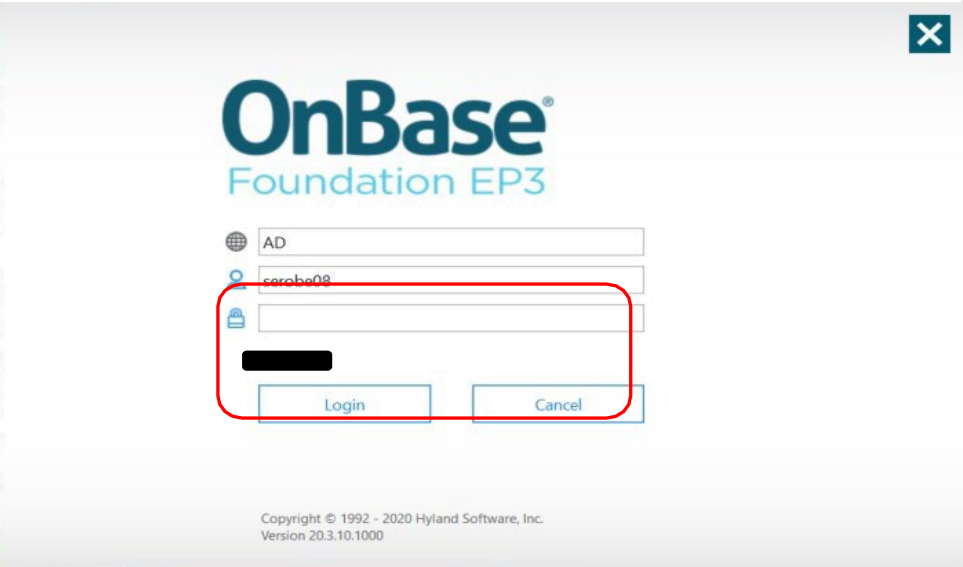
### Performance Appraisal

**Performance Appraisal**  
The performance appraisal process is a key component of the performance management system. It provides a structured way to evaluate employee performance and provide feedback.

**Performance Appraisal**  
The Professional Development process is a key component of the performance management system. It provides a structured way to evaluate employee performance and provide feedback.

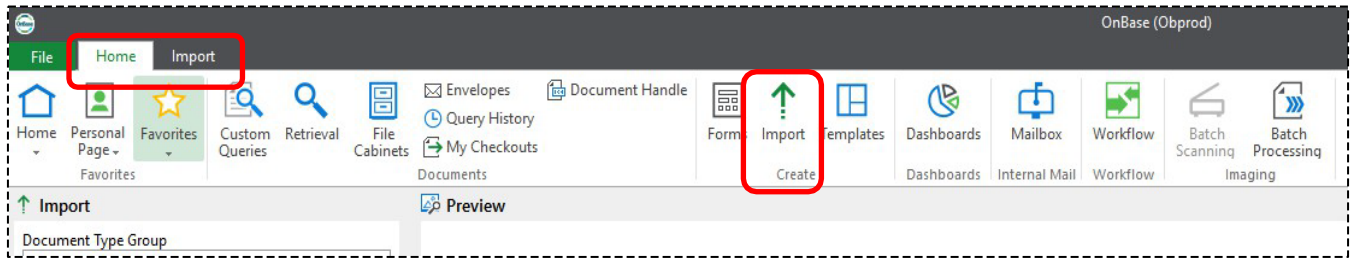
- Understand how to use the system
- Understand their role in the process
- Understand how to provide feedback
- Understand how to receive feedback
- Learn how to coach
- How to work towards goals
- Know the guidelines

If you are unable to access the system, please contact your supervisor or the HR department.



The image shows the OnBase Foundation EP3 login screen. It features the OnBase logo and the text 'Foundation EP3'. Below the logo, there are three input fields: a domain field with 'AD' entered, a username field with 'cerobe08' entered, and a password field with a blacked-out password. A red rectangle highlights the username and password fields. At the bottom of the login area are 'Login' and 'Cancel' buttons. The footer of the screen displays 'Copyright © 1992 - 2020 Hyland Software, Inc. Version 20.3.10.1000'.

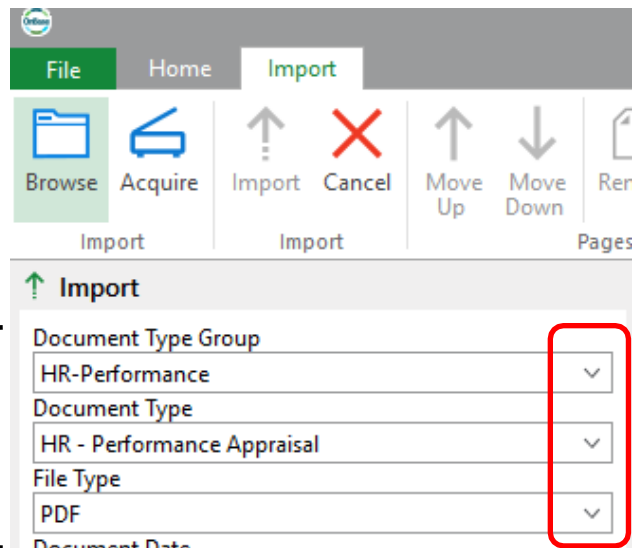
- From the **Home** tab click on the **Import** icon, this will open a new tab to import the documents.



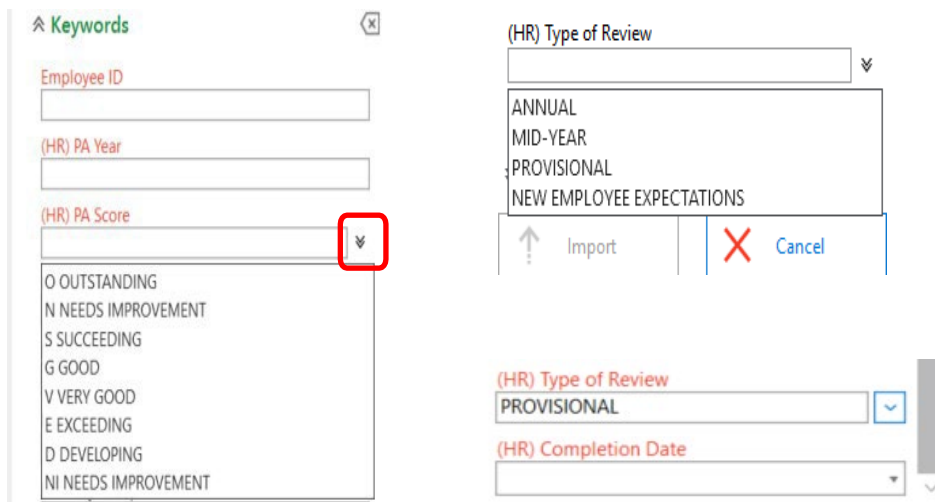
- Select from the drop-down arrows:

- **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.).

*All sections to be completed*



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

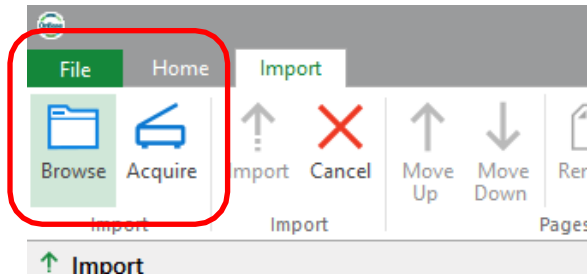
Import Cancel

(HR) Type of Review

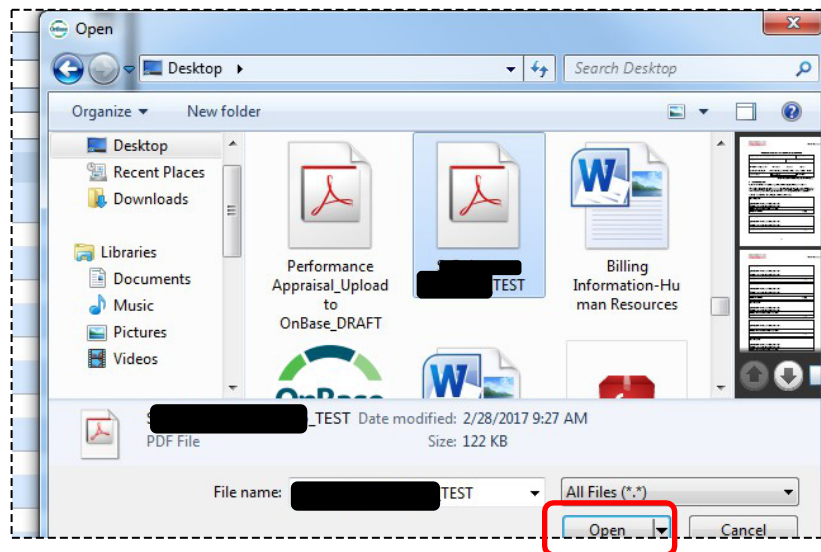
PROVISIONAL

(HR) Completion Date

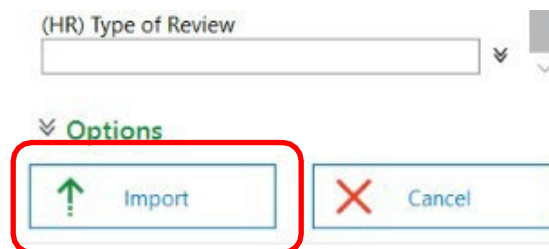
5. Once all fields are completed, you may click on **Browse** or **Acquire** referenced in #3.



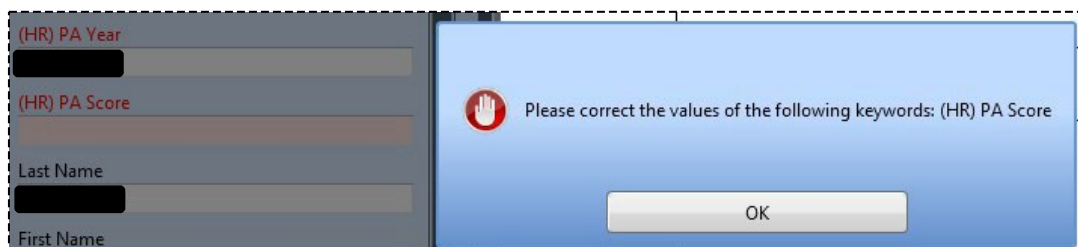
6. Retrieve the document where you initially saved the performance evaluation on your computer; the document name does not matter as it will automatically change when uploaded.



7. Select **Import**.

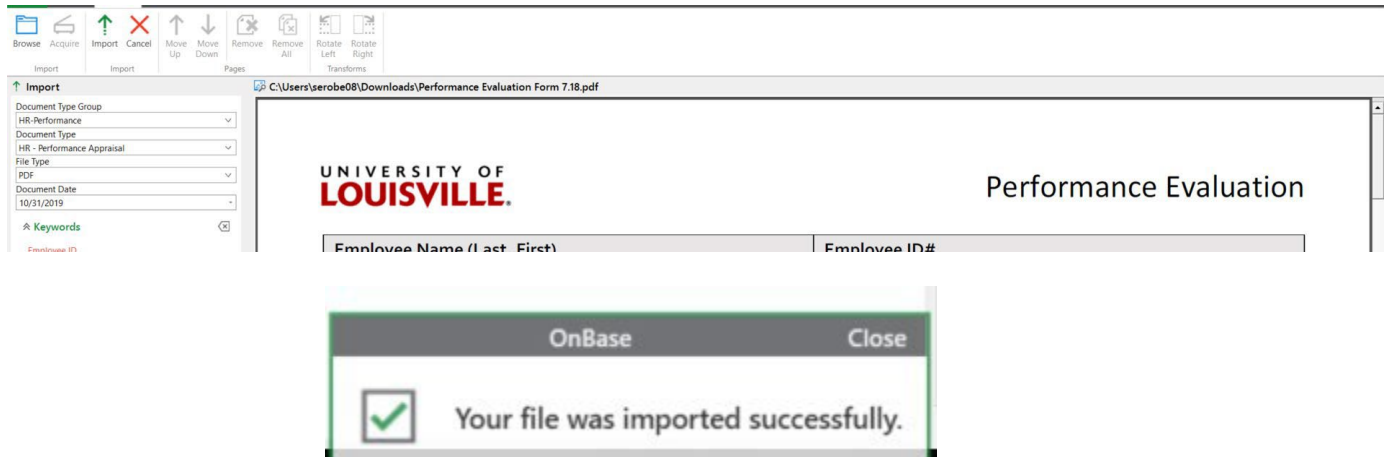


8. If **not** all **Keywords** are typed in when you select **Import**, an error box will appear. Please select **OK** and complete the missing field(s) and select **Import** again.



9. 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.

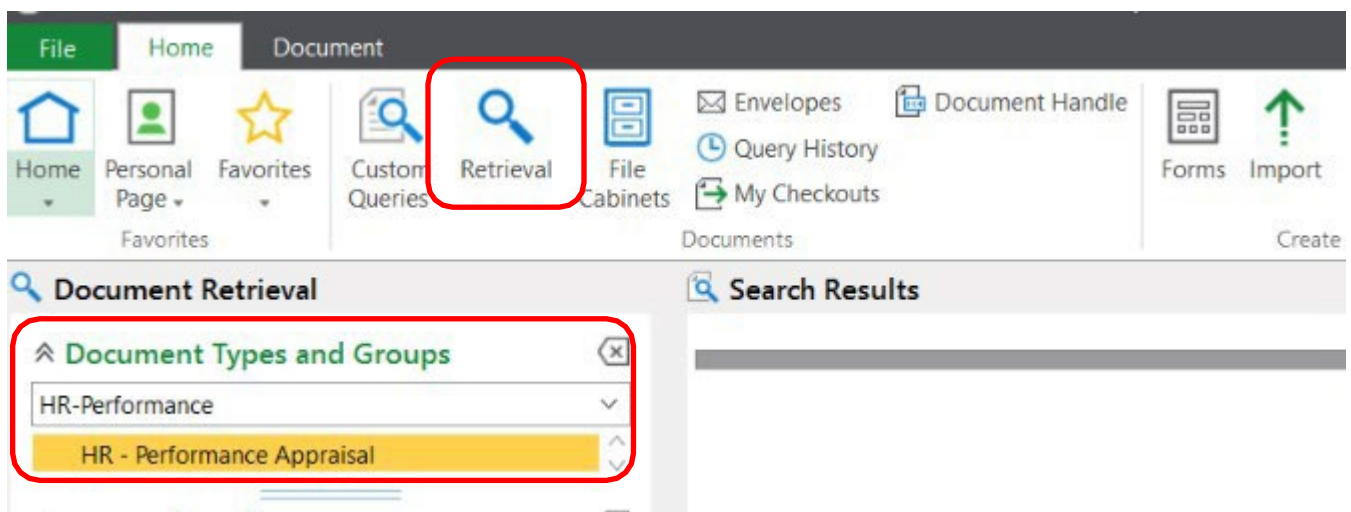
**Employee ID – YEAR for Last Name,First Name Score:**



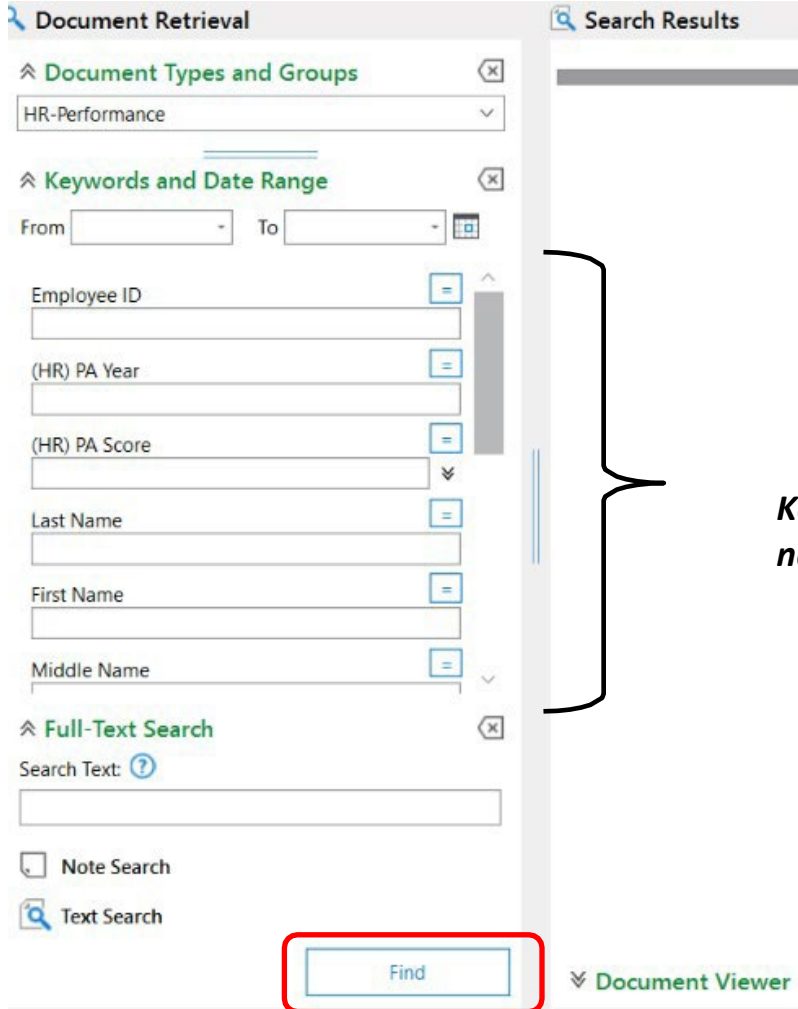
10. The employee's performance evaluation is now in OnBase and you can proceed to upload the next performance evaluation.

### **View Scanned Performance Evaluations in OnBase:**

11. 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

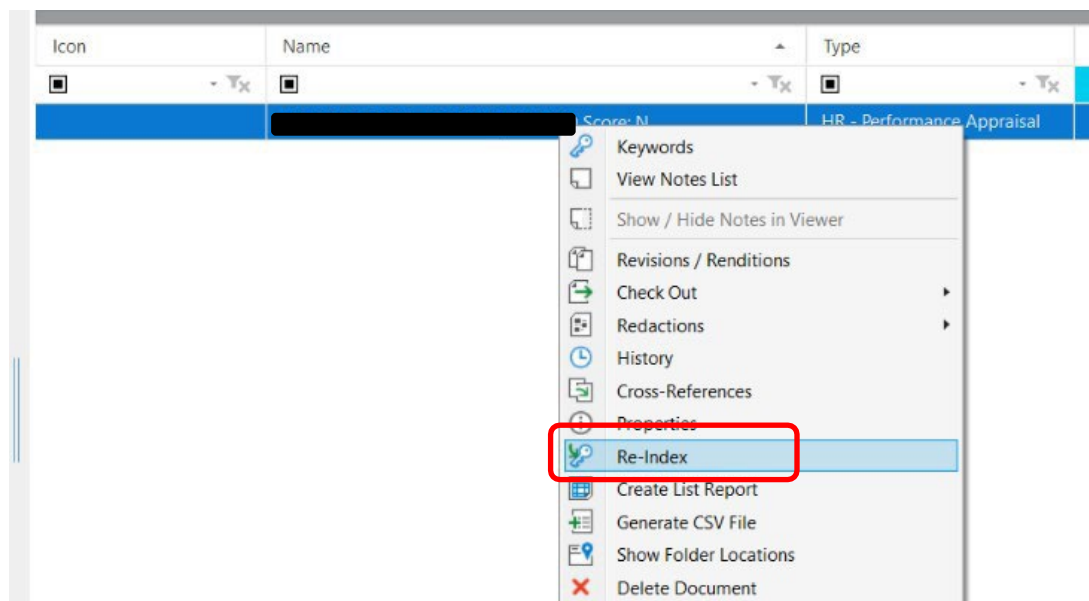
**Find**

**Search Results**

**Document Viewer**

*Enter other Keywords to narrow search*

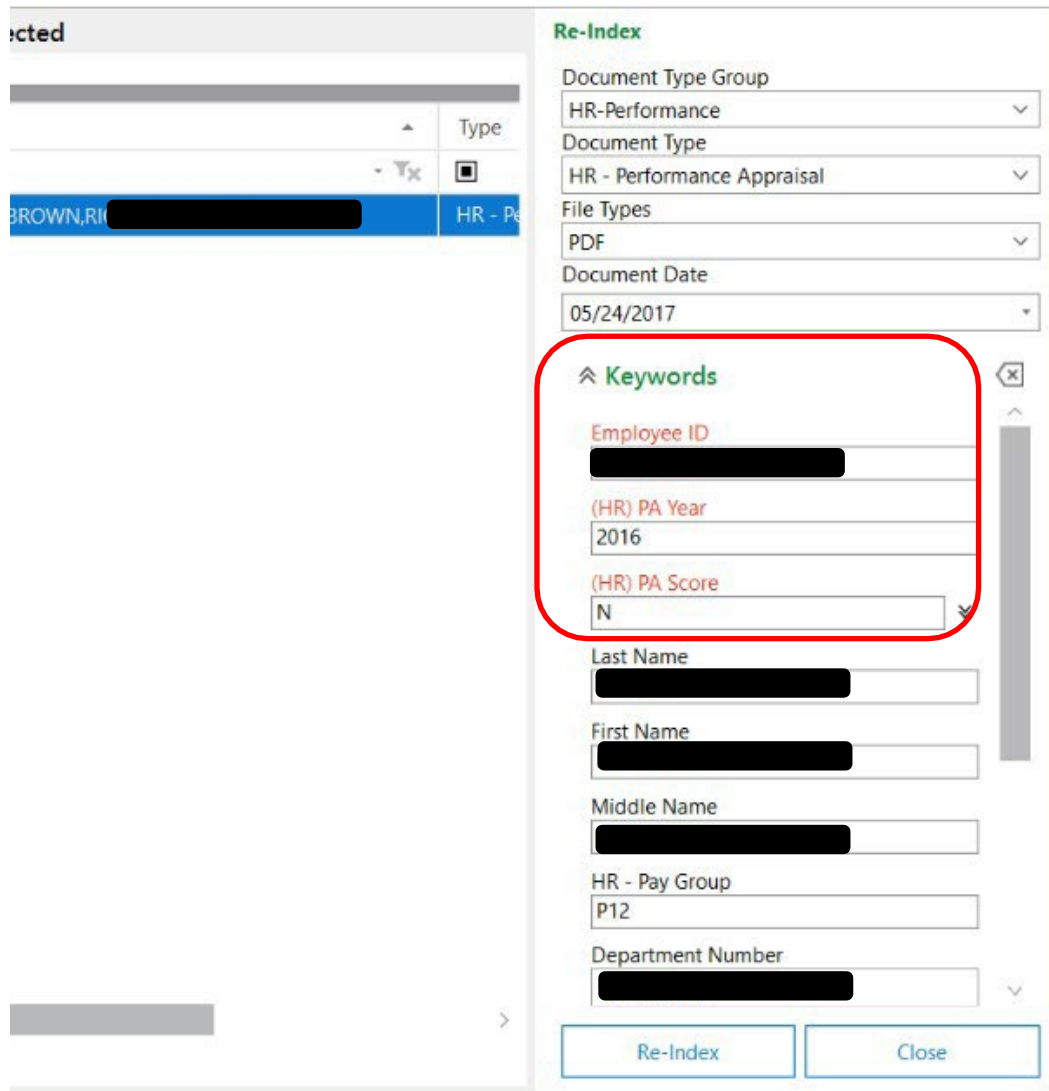
13. If you have pulled your list from above and realize that the score was entered incorrectly, the wrong document uploaded, or duplicated PA entry, please **right click** on the document and select **Re-Index**.



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](mailto: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](mailto:helpdesk@louisville.edu).



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| Type             |
|------------------|
| BROWN, RICHARD   |
| HR - Performance |

**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