

# OnBase – Unity Client (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](mailto: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.

If you do not currently have OnBase, you will need to install the Unity Client, which requires Internet Explorer 11 or above: <https://onbase.louisville.edu/InstallUnity/UnityClientPROD.application> - this 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 in your search at the bottom of your computer – Hyland Unity and the OnBase icon should populate if you do. If you don't, you'll need to install the application or use the web version. The web version of OnBase: <https://onbase.louisville.edu> may require certain installation prerequisites. Information found on <https://louisville.edu/hr/employeerelations/performance-appraisal> > Uploading to OnBase > OnBase Download Information (provided by ITS on K drive).

## Upload Performance Appraisals to OnBase – Unity Client:

1. Once you have installed the *OnBase Unity Client*, you will need to log in using your University **user ID** and **password**. You must also be using the AD domain in order 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

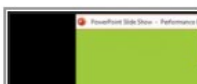
The performance appraisal process is a performance appraisal process.

### Performance Appraisal

The Professional Development

- Understand how the process works
- 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 system administrator.



OnBase®  
Foundation EP3

AD

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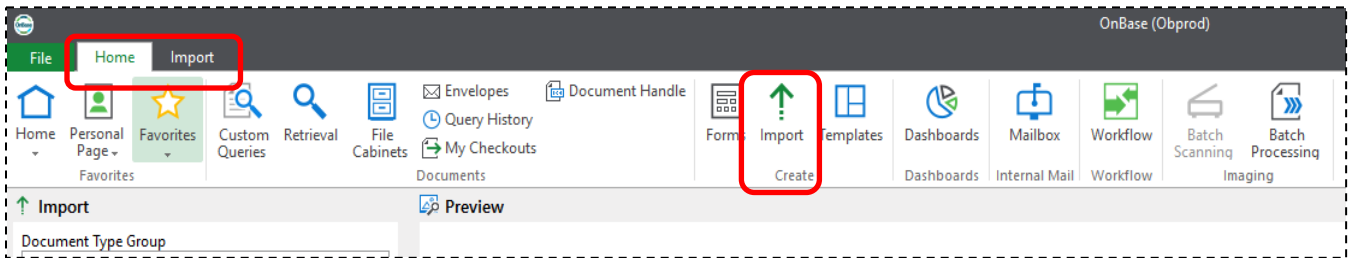
██████████

Login Cancel

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Version 20.3.10.1000

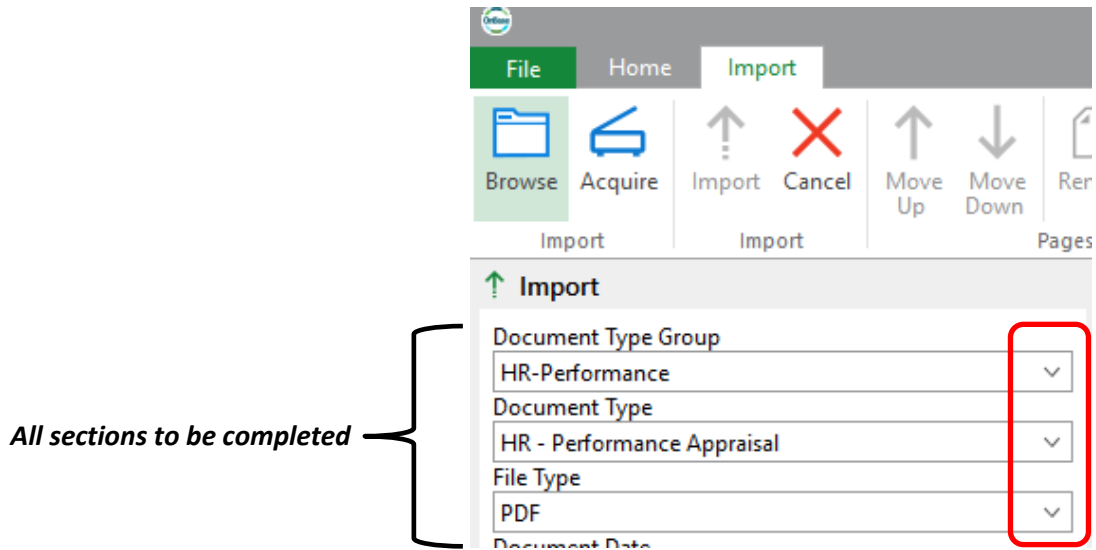
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2. Click on the **Import** icon from your Home tab, which creates a new tab.



3. Select from the drop-down arrows:

- **Document Type Group** - select **HR-Performance**
- **Document Type** – select **HR – Performance Appraisal**
- 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.*).



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- Once the sections are completed, the three mandatory **Keywords** will appear: **Employee ID**, **PA Year** and **PA Score**. Please enter the 3 mandatory Keywords. The **PA Score** will have a dropdown menu, please select the appropriate score.

**Mandatory Keywords**

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

- The remaining fields will auto-populate according to PeopleSoft after the Employee ID has been entered.

**Auto-populates remaining fields**

Last Name

First Name

Middle Name

HR - Pay Group

Department Number

Department

Inh Title

- There is also an option to select the Type of Review: **Annual**, **Mid-Year**, **Provisional** and **New Employee Expectations**, currently located towards the bottom of the panel.

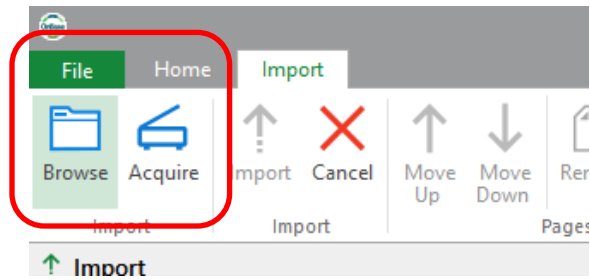
(HR) Type of Review

ANNUAL  
MID-YEAR  
PROVISIONAL  
NEW EMPLOYEE EXPECTATIONS

Import Cancel

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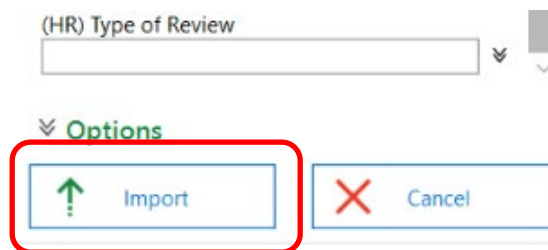
7. Once completed, you may click on **Browse** or **Acquire** referenced in #3.



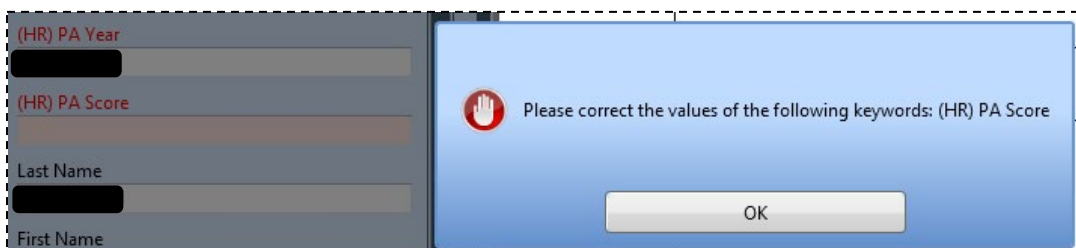
8. Retrieve the document where you initially saved the performance appraisal on your computer; the document name does not matter as it will automatically change when uploaded.



9. Select **Import**.



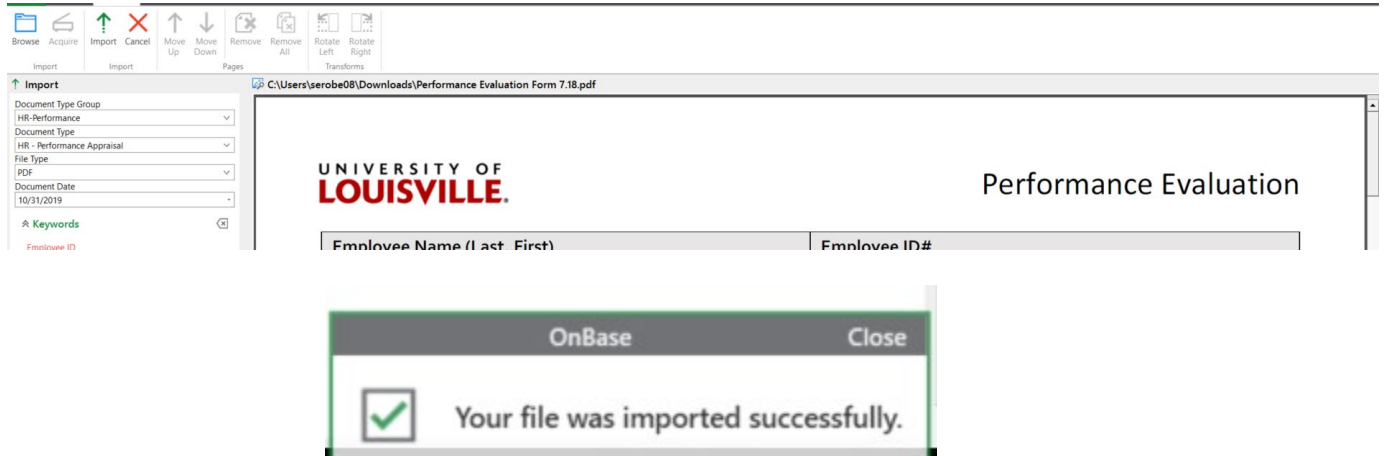
10. If not all **keywords** are typed in when you select **Import**, an error box will appear. Please select **OK** and complete the missing field(s) and select **Import** again.



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

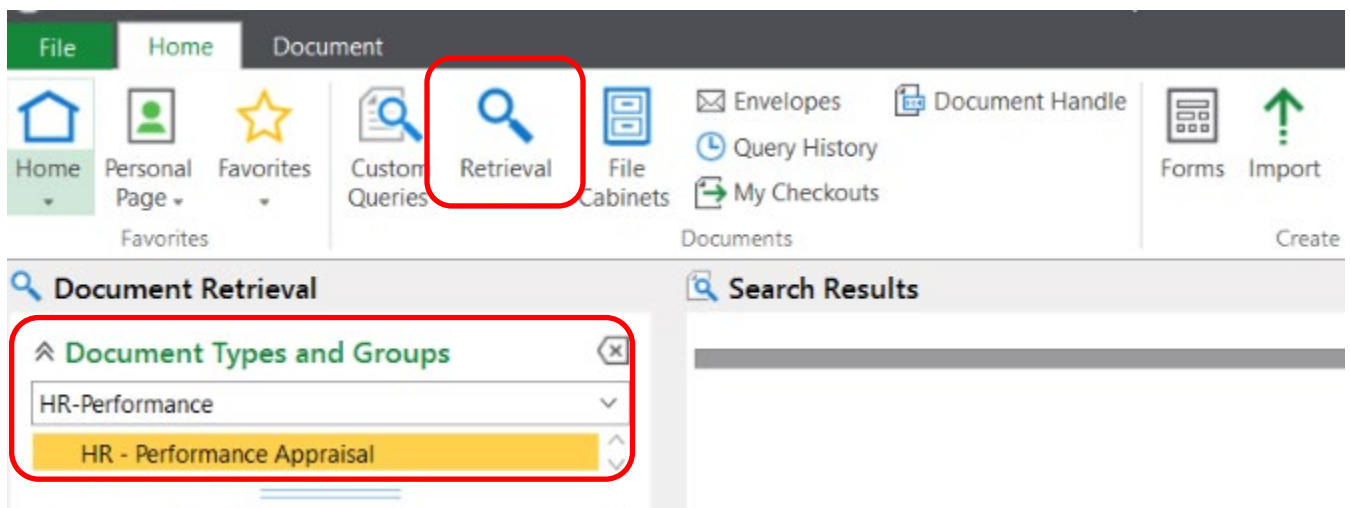
**Employee ID – YEAR for Last Name,First Name Score:**



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

## View Scanned Performance Appraisals in OnBase:

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



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2. 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.

The screenshot displays the 'Document Retrieval' interface. It includes sections for 'Document Types and Groups' (set to HR-Performance), 'Keywords and Date Range' (with 'From' and 'To' date pickers), and 'Full-Text Search' (with a 'Search Text' input field). Below these are checkboxes for 'Note Search' and 'Text Search'. A large bracket on the right side of the search filters is labeled 'Enter other Keywords to narrow search'. At the bottom of the search panel, the 'Find' button is highlighted with a red rectangular box. The 'Document Viewer' section is visible at the bottom right.

3. 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**.

The screenshot shows a table with columns for 'Icon', 'Name', and 'Type'. A document entry is selected, and a context menu is open over it. The 'Re-Index' option in the menu is highlighted with a red rectangular box. Other options in the menu include 'Keywords', 'View Notes List', 'Show / Hide Notes in Viewer', 'Revisions / Renditions', 'Check Out', 'Redactions', 'History', 'Cross-References', 'Properties', 'Create List Report', 'Generate CSV File', 'Show Folder Locations', and 'Delete Document'.

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4. You can update the mandatory Keyword fields, then click on **Re-Index** at the bottom, for any errors.
5. If you need to delete a duplication, please send an email [hradmin@louisville.edu](mailto: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.

The screenshot displays the OnBase Unity Client interface. On the left, a table lists documents, with one entry for 'BROWN, R...' and 'HR - Pe...'. The main area shows the 'Re-Index' dialog box. The 'Keywords' section is highlighted with a red rounded rectangle and contains the following fields:

- Employee ID: [Redacted]
- (HR) PA Year: 2016
- (HR) PA Score: N

Below the 'Keywords' section are fields for Last Name, First Name, Middle Name, HR - Pay Group (P12), and Department Number. At the bottom of the dialog are 'Re-Index' and 'Close' buttons.

13. If you have any questions regarding the submission of Performance Appraisals to OnBase, please contact Human Resources at [hradmin@louisville.edu](mailto:hradmin@louisville.edu).