

Overview

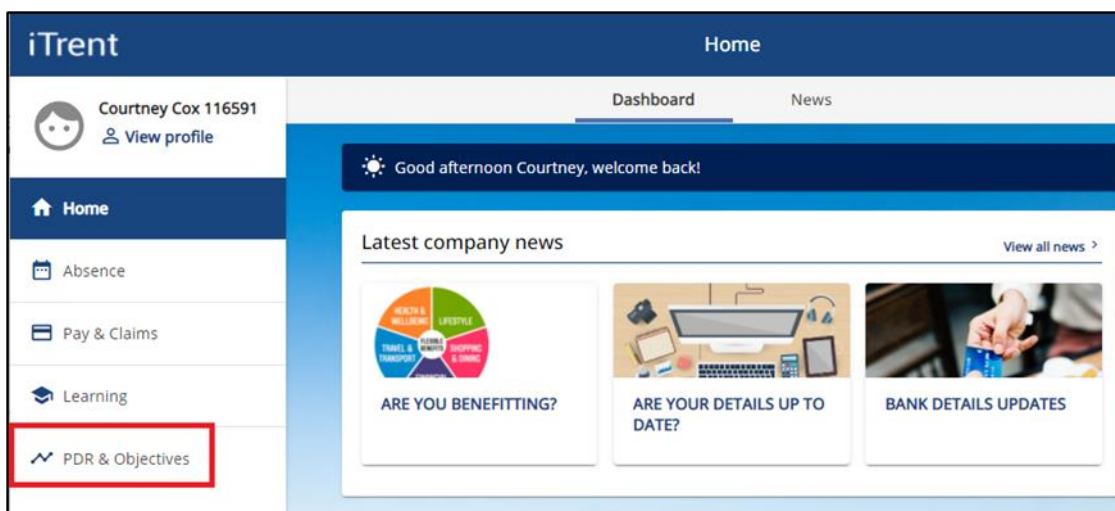
- You can upload supporting documents to individual objectives if you wish.
- You can upload multiple documents to a single objective.
- You can delete any attached documents if you wish.
- You can upload your objectives as a document attachment if you wish.
- Your manager can view any documents you upload, via People Manager.

This guide covers the following actions.

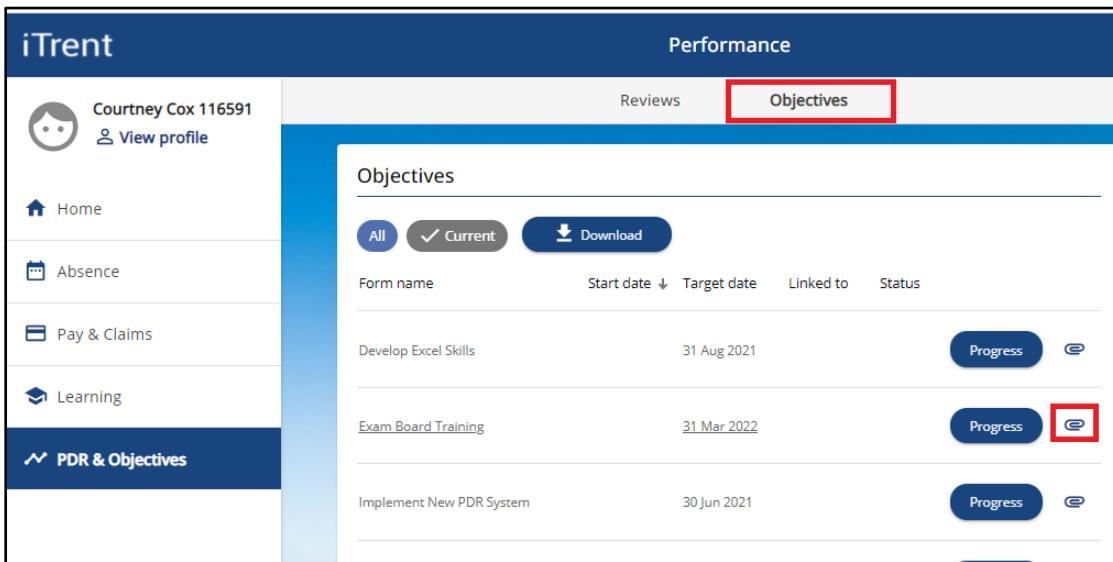
- Uploading supporting documents - pages 1-3.
- Downloading supporting documents - page 4.
- Deleting supporting documents - pages 5-6.
- Uploading your objectives as one document - pages 7-9

UPLOAD SUPPORTING DOCUMENT

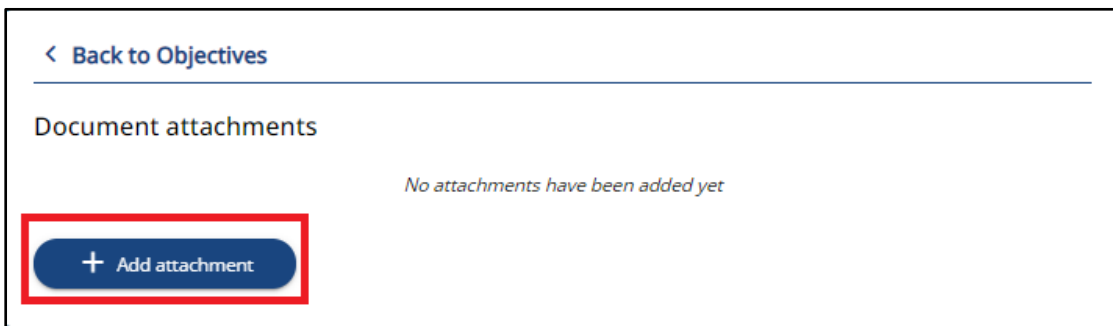
- Login to Employee Self-Service and click on the PDR & Objectives Menu option, as below.



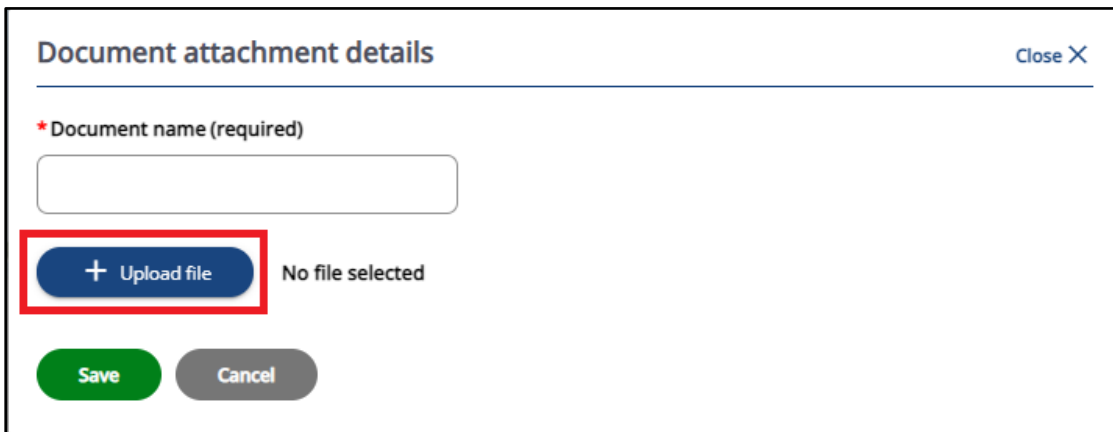
- Click on the Objectives menu option, as below.
- Any objectives which are in progress, that you have already added, will be displayed.
- Click on the paperclip icon for the relevant objective, as below.



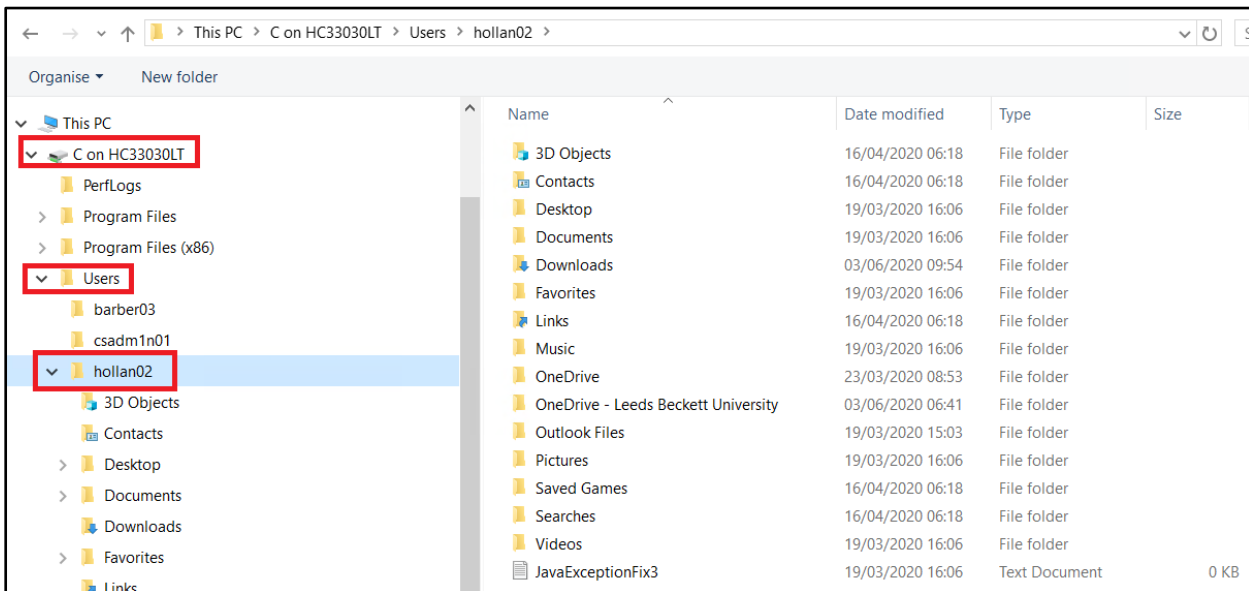
- This will open a new Document Attachments window, as below.



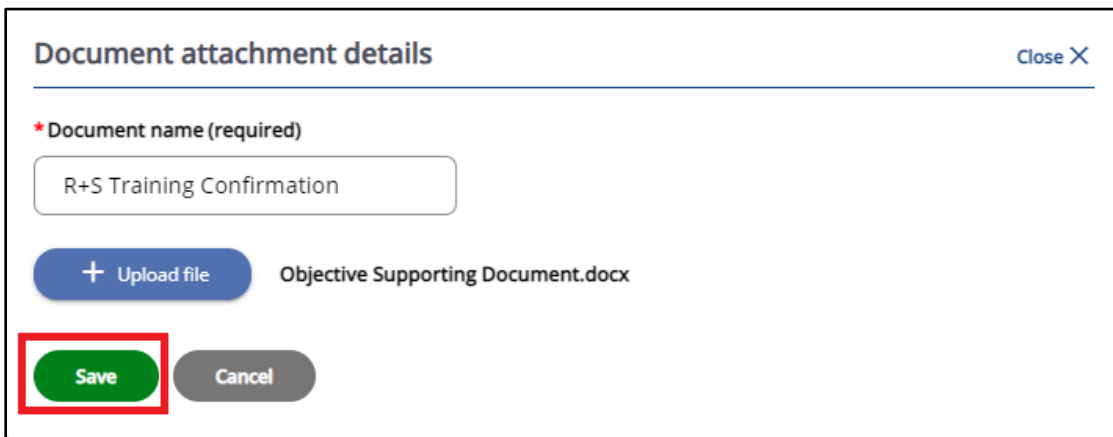
- Click on the Add Attachments button, as above, to open a new window, as below.



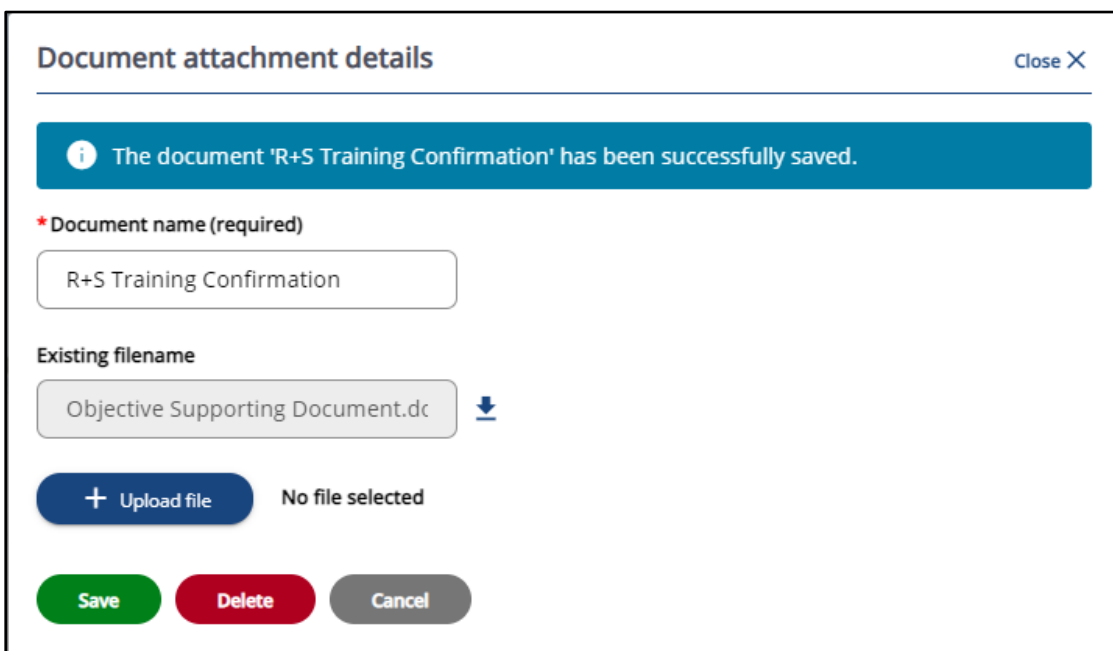
Tip: If you are accessing iTrent off-campus, via RemoteApp, you will need to save the document to be attached to the C drive > Users folder (P drive for Mac users) on your computer/laptop before you can search for and select it within Self-Service. An example screenshot is below. The name of the C drive and User folders will differ on your computer/laptop.



- Document Name > give the file an appropriate name.
- Upload File > click to browse for and select the document to be attached, as below.
- Click Save to upload the document.



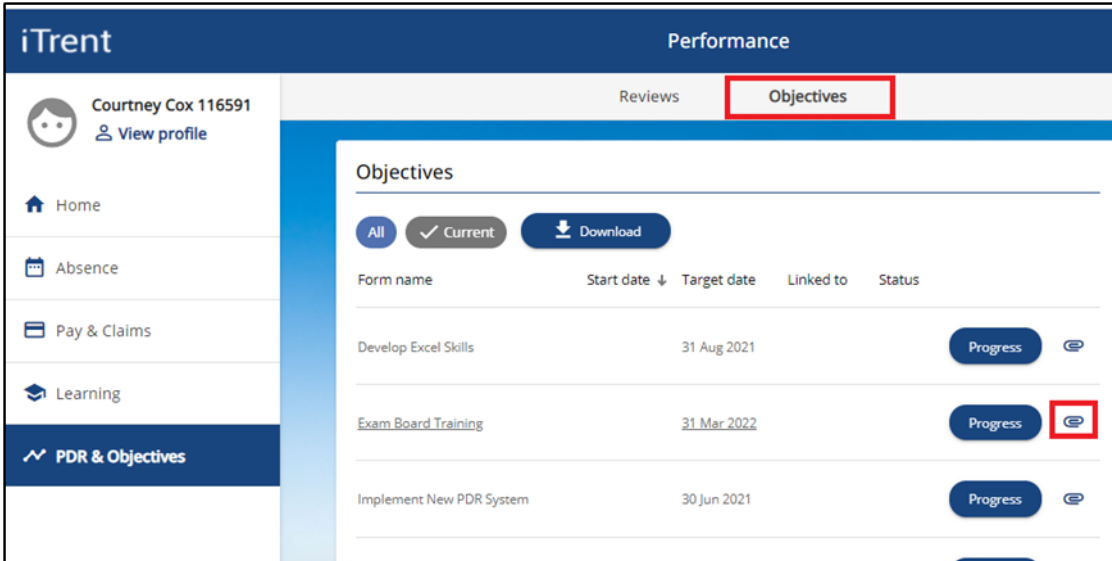
- Once the document has uploaded, the screen will display as below.
- Click the Close link to return to the Document Attachments window.
- From there, click the Back to Objectives link to return to the main Objectives screen.



- To attach a second or further attachment, repeat the steps outlined above.

DOWNLOAD SUPPORTING DOCUMENT

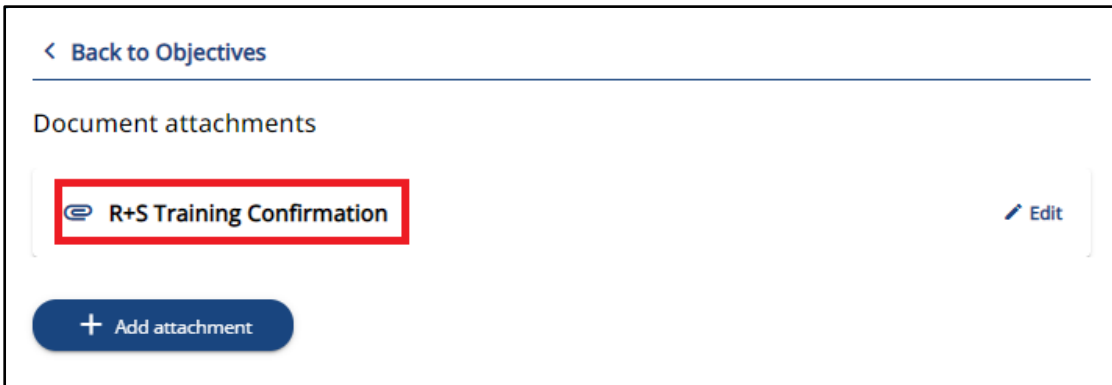
- To download a document, click on the paperclip icon for the relevant objective, as below.



The screenshot shows the iTrent Performance interface. The user is Courtney Cox (116591). The 'Objectives' tab is selected. A table lists objectives with columns for Form name, Start date, Target date, Linked to, and Status. The 'Exam Board Training' objective has a target date of 31 Mar 2022 and a 'Progress' button with a paperclip icon highlighted by a red box.

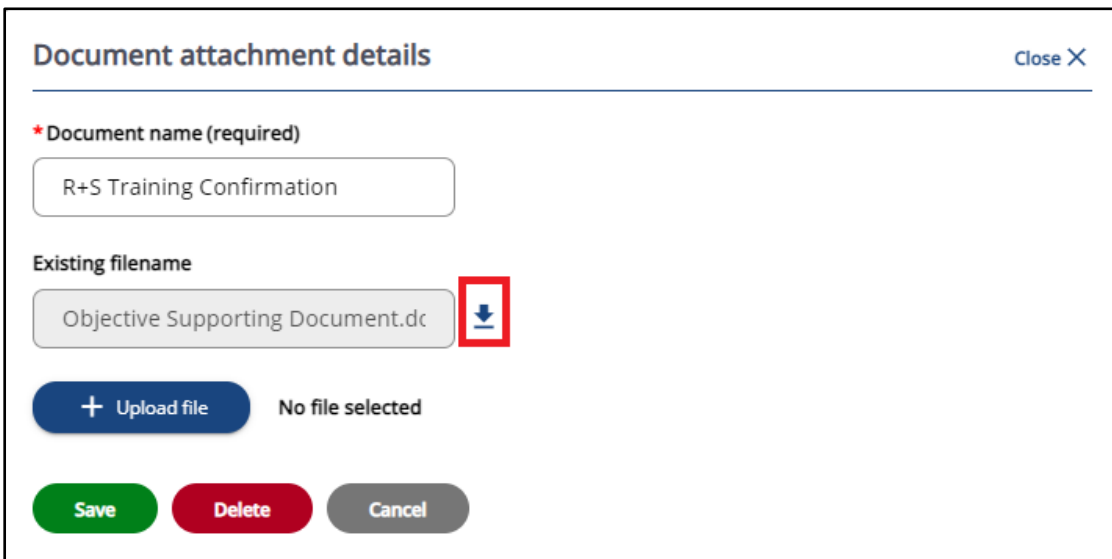
Form name	Start date	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Exam Board Training		31 Mar 2022		Progress
Implement New PDR System		30 Jun 2021		Progress

- This will open the Document Attachments window, as below.
- Any documents already attached will be listed, as below.
- Click on the document name, as below, to open the Document Attachments window.



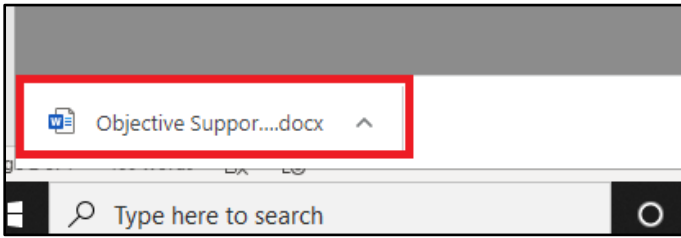
The screenshot shows the 'Document attachments' window. A list of attachments is displayed, with 'R+S Training Confirmation' highlighted by a red box. An 'Add attachment' button is visible at the bottom.

- Click the down-arrow download button to download and open the file, as below.



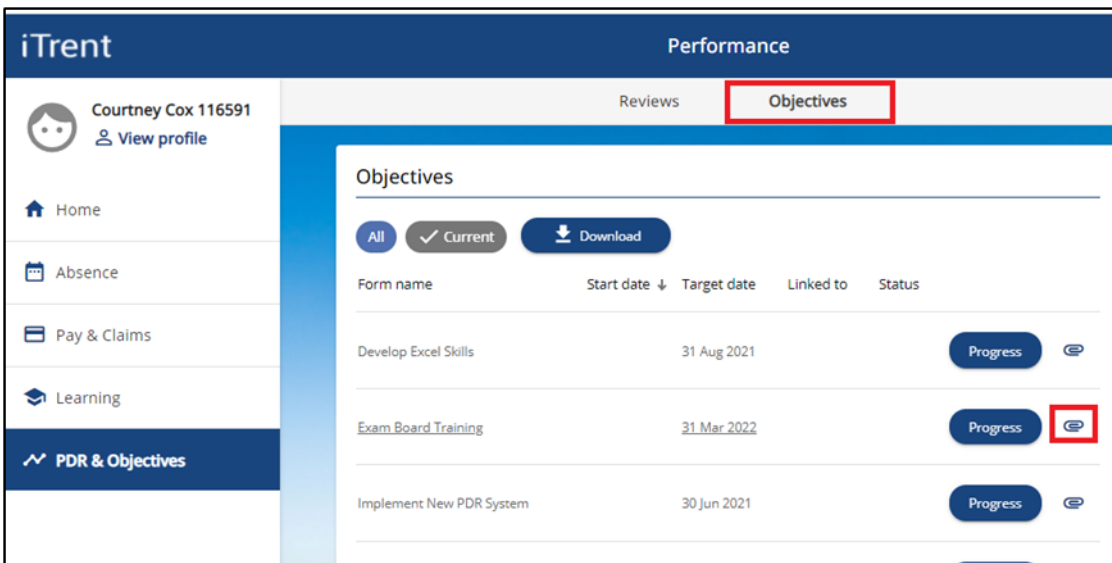
The screenshot shows the 'Document attachment details' window. The document name is 'R+S Training Confirmation'. The existing filename is 'Objective Supporting Document.dc', and a download button (downward arrow) is highlighted with a red box. Buttons for 'Save', 'Delete', and 'Cancel' are at the bottom.

- Once the document downloads, open it in a new browser session, as below.

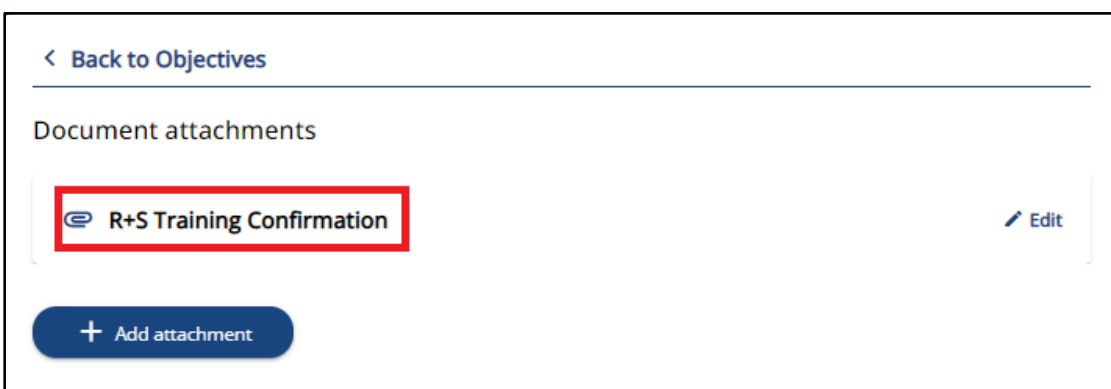


DELETE SUPPORTING DOCUMENT

- To delete an existing document, click on the paperclip icon for the relevant objective, as below.



- This will open the Document Attachments window, as below.
- Any documents already attached will be listed, as below.
- Click on the document name, as below, to open the Document Attachments window.



- Click the Delete button to remove the document, as below.
- Click Confirm to delete the file or Cancel to cancel the deletion, as below.

Document attachment details

Close X

* Document name (required)

R+S Training Confirmation

Existing filename

Objective Supporting Document.doc



+ Upload file

No file selected


Save

Delete

Cancel

Delete record?

Close X

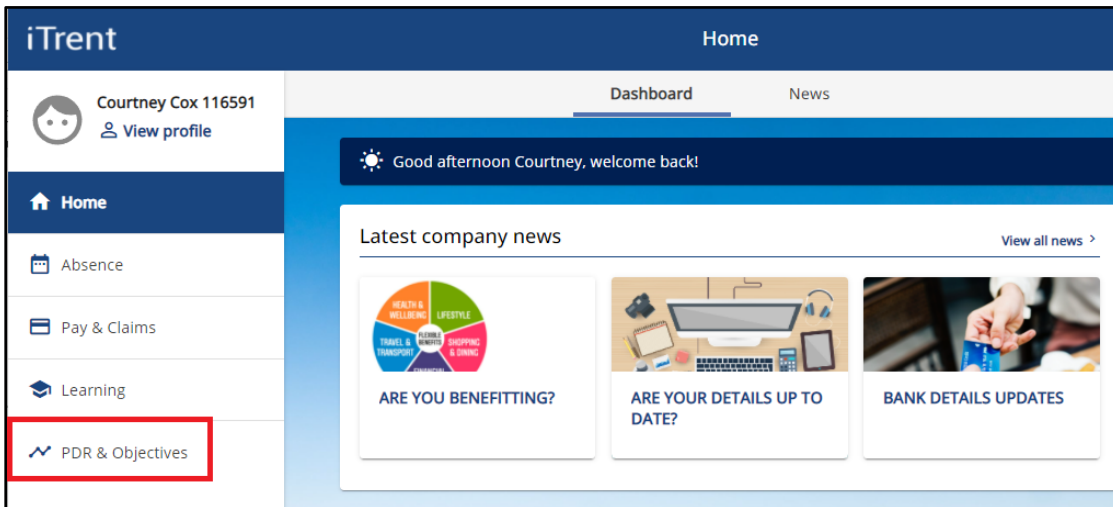
 Are you sure you want to delete this record?

Confirm

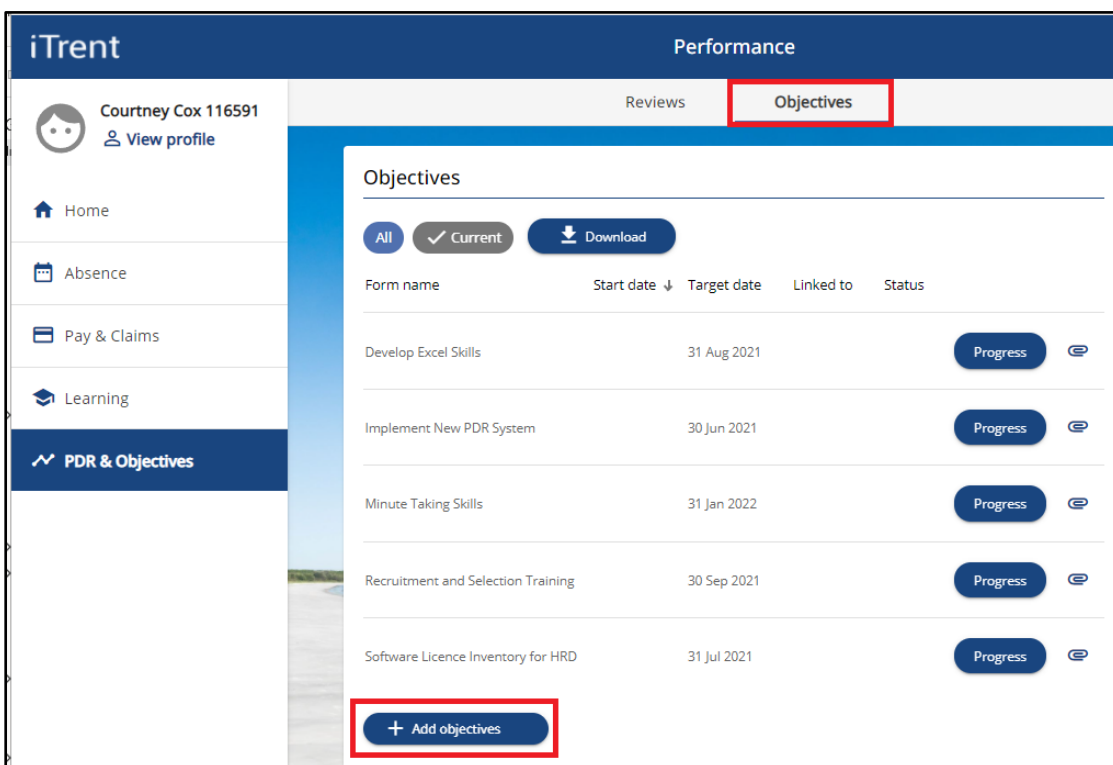
Cancel

UPLOAD OBJECTIVES AS ONE DOCUMENT ATTACHMENT

- Login to Employee Self-Service and click on the PDR & Objectives menu option, as below.



- Click on the Objectives menu option, as below.
- Any objectives which are in progress, that you have already added, will be displayed.
- Click on the Add Objectives button to open a new Objective Details window.



- When you click on the Add Objectives button, a new window will open as below.
- Objective Title > create an appropriate name for your objective summary, eg PDR Objectives Overview 2023.
- Objective Type > select either Work Based or Development.
- Attachment Date – add the start date of the PDR cycle, eg 01/07/23.
- Description > add brief details, eg “See attached document”.
- Target Completion Date > add the end of the PDR cycle, eg 31/12/23.
- Completion Date > leave blank until after your annual PDR discussion.
- Position > this field defaults to “All” and should be left as “All”.
- Document Attachments > click on the link > click on Choose File > browse for and select your document.
- Click the paperclip icon to save the document as an attachment.

- Click the Save button to save your changes.

[< Back to Objectives](#)

Objective details

Objective details: New

Objective Title (required)

Type (required)

Attachment date (required)

Description

Target completion date

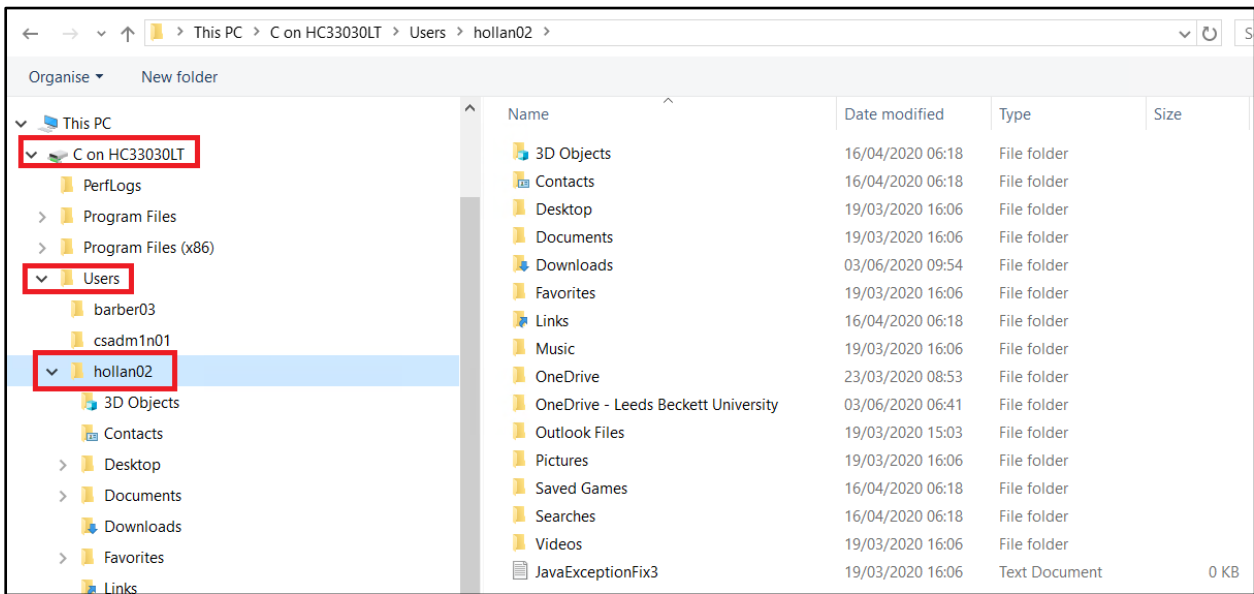
Completion date

Position

Document attachments

Attach document
 PDR Objectives Overview 2023.docx

Tip: If you are accessing iTrent off-campus, via RemoteApp, you will need to save the document to be attached to the C drive > Users folder (P drive for Mac users) on your computer/laptop before you can search for and select it within Self-Service. An example screenshot is below. The name of the C drive and User folders will differ on your computer/laptop.



- Once the objective has been saved, the Objectives screen will display as below.

