ESS GUIDE > HOW TO ATTACH DOCUMENTS TO YOUR OBJECTIVES

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
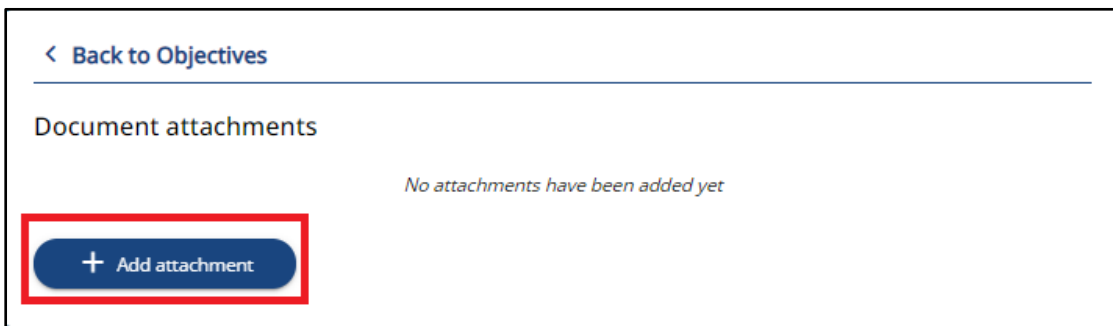
UPLOAD SUPPORTING DOCUMENT

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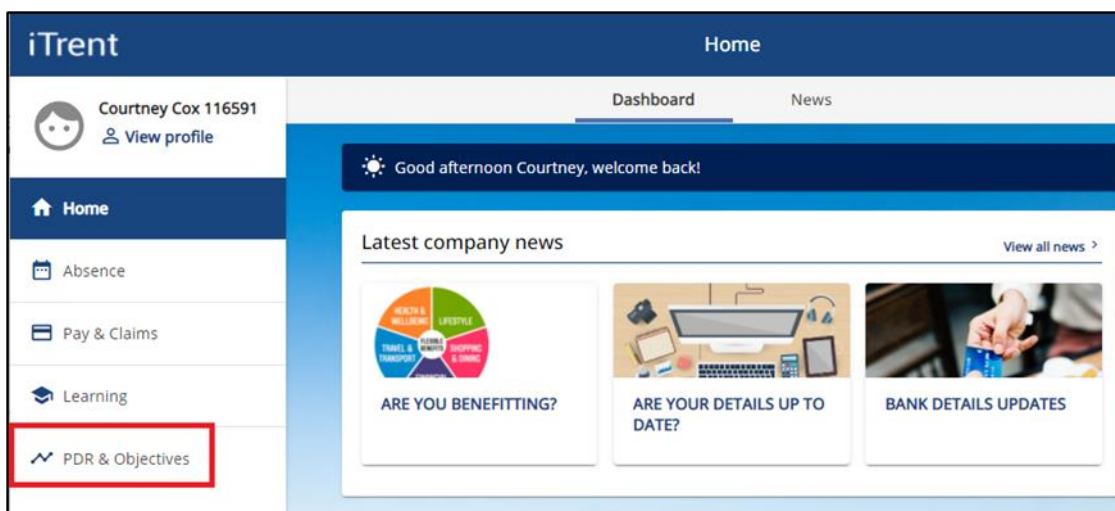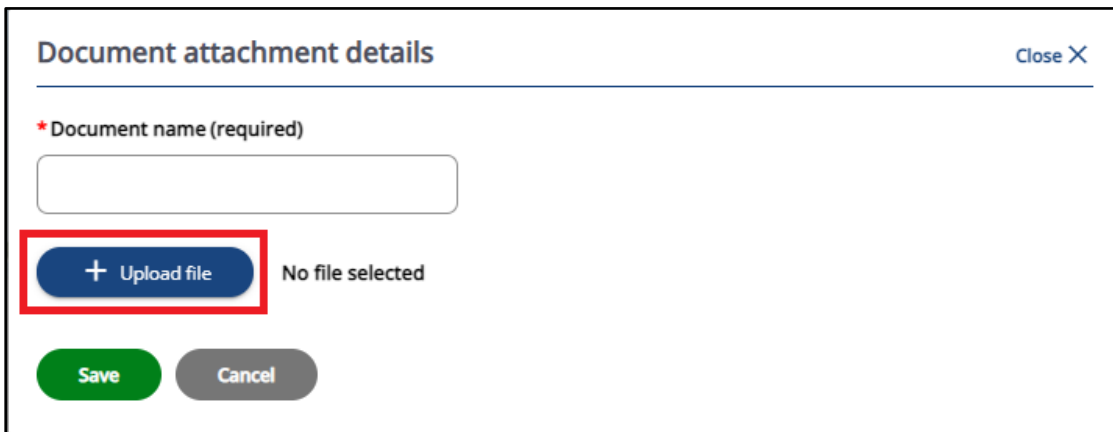

- Click on the Objectives menu option, as below.
- Any objectives which are in progress, that you have already added, will be displayed.
- Click on the paperclip icon for the relevant objective, as below.
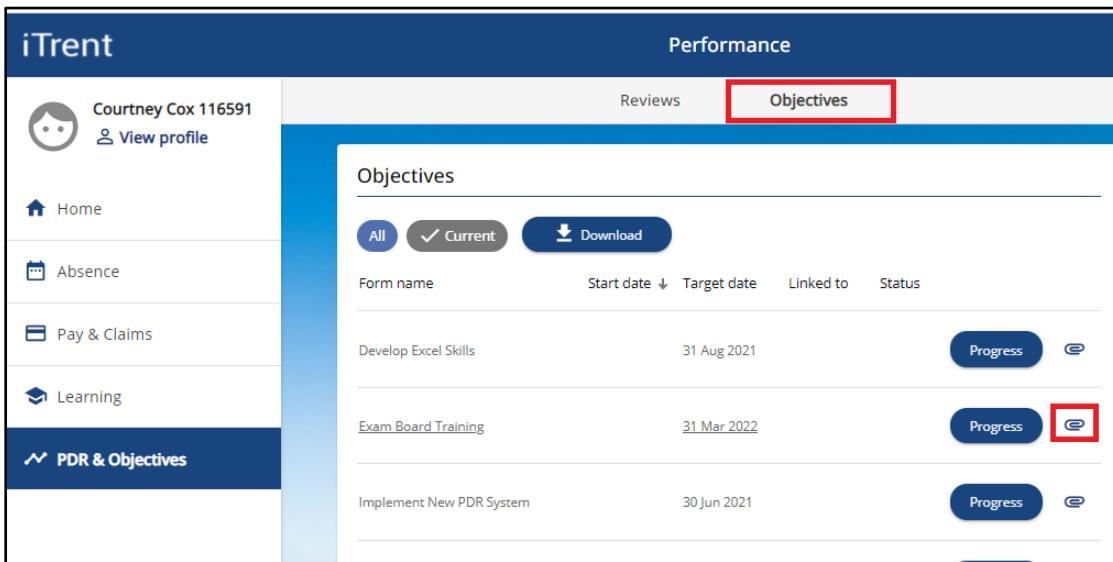
- This will open a new Document Attachments window, as below.

- 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.
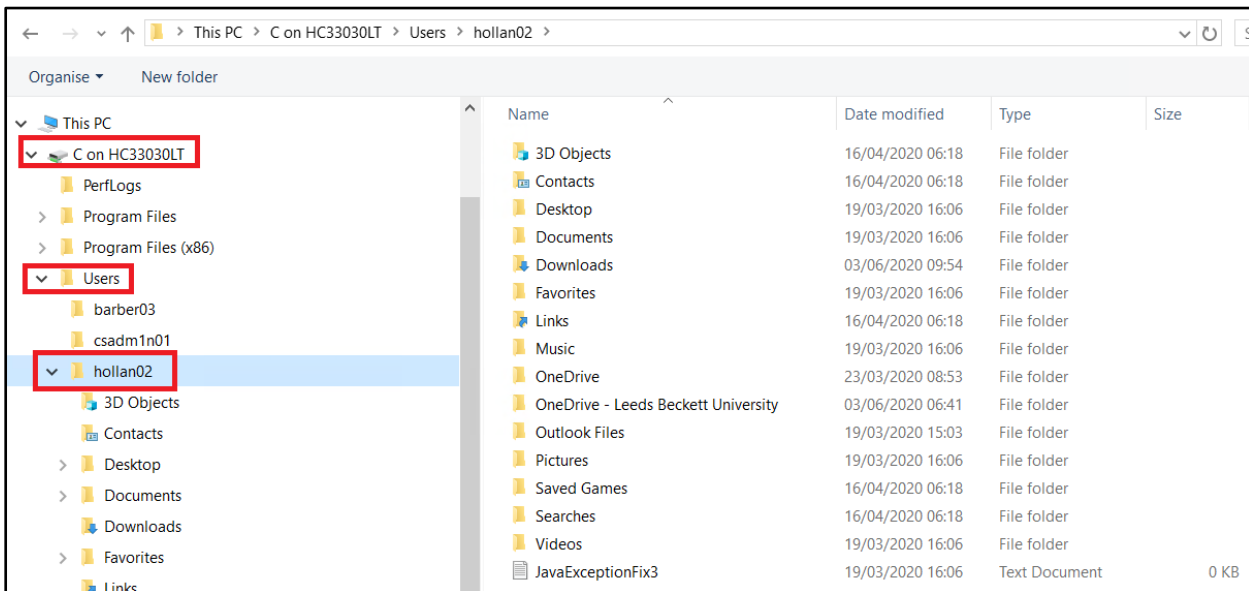
- Document Name > give the file an appropriate name.
- Upload File > click to browse for and select the document to be attached, as below.
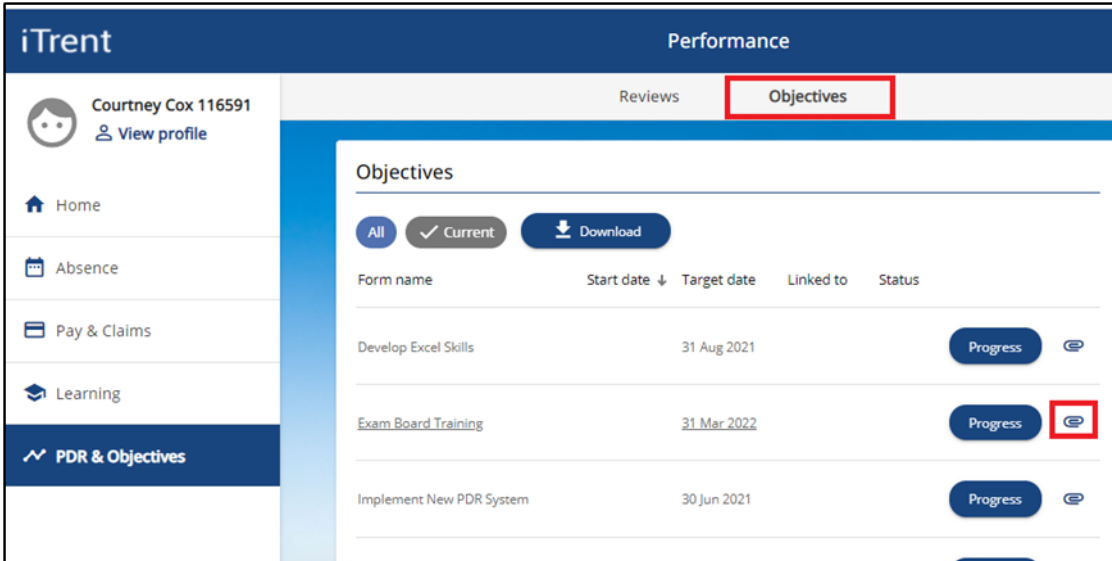- Click Save to upload the document.
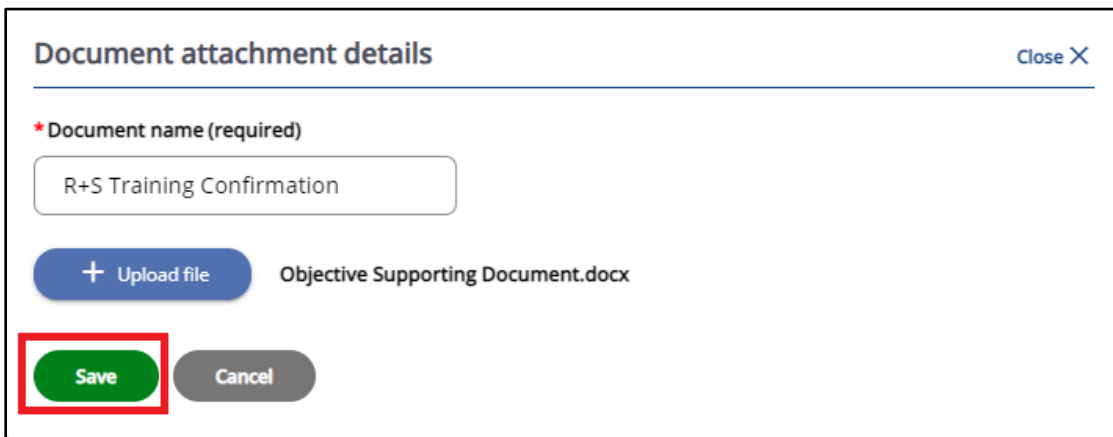
- Once the document has uploaded, the screen will display as below.
- Click the Close link to return to the Document Attachments window.
- From there, click the Back to Objectives link to return to the main Objectives screen.
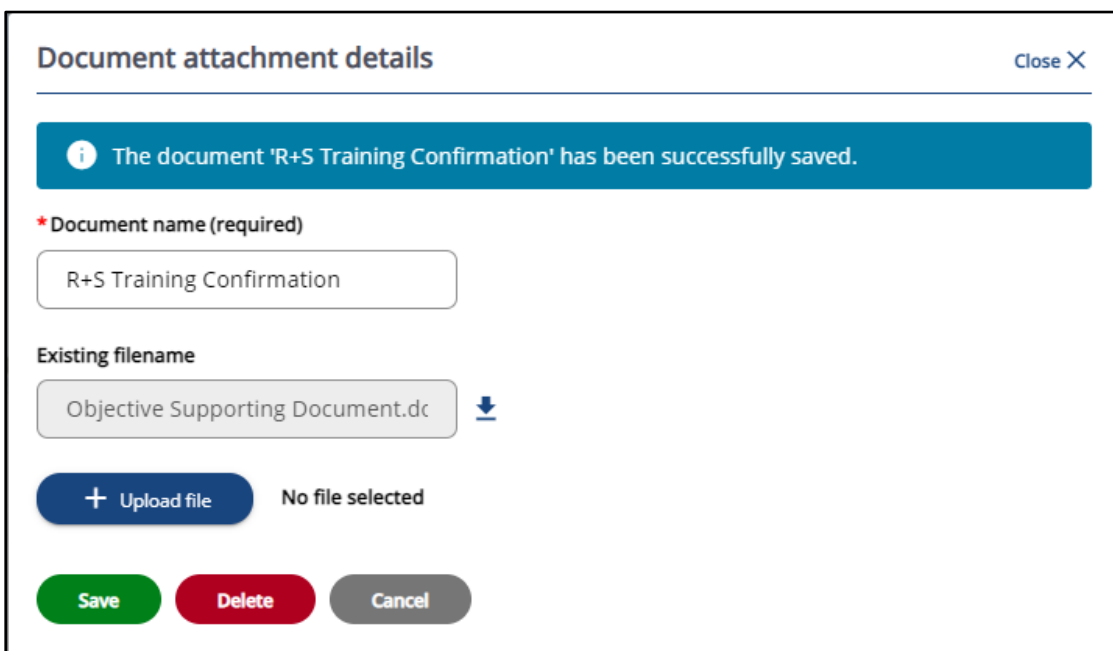
- To attach a second or further attachment, repeat the steps outlined above.
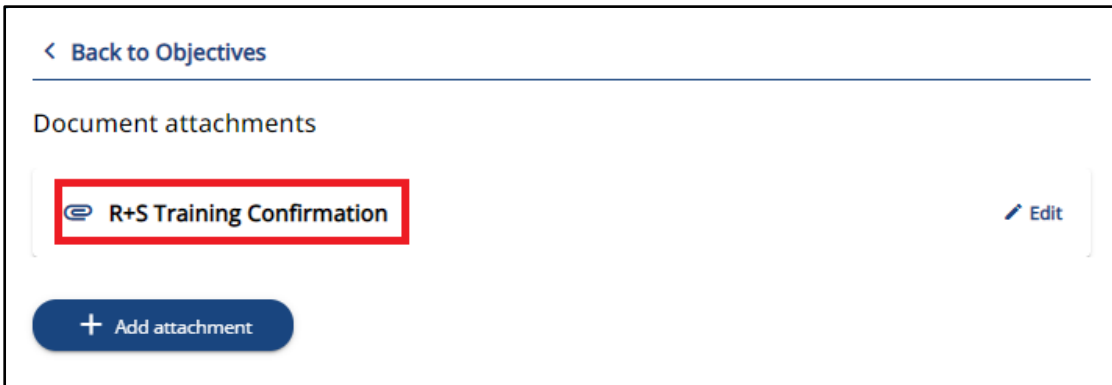
DOWNLOAD SUPPORTING DOCUMENT

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

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

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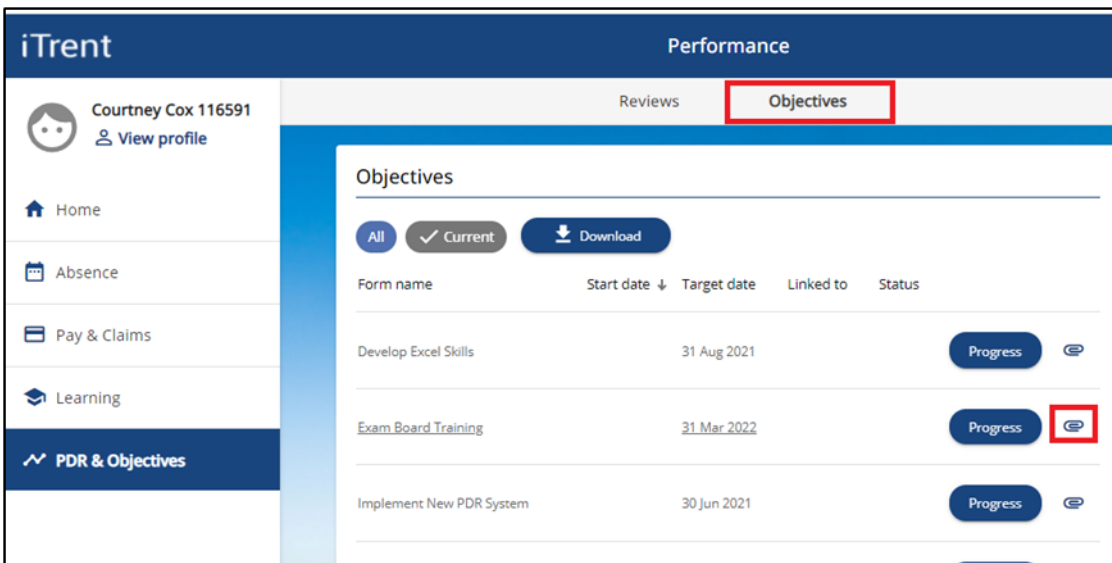
- This will open the Document Attachments window, as below.
- Any documents already attached will be listed, as below.
- Click on the document name, as below, to open the Document Attachments window.
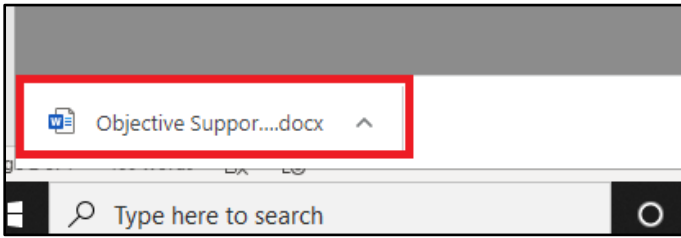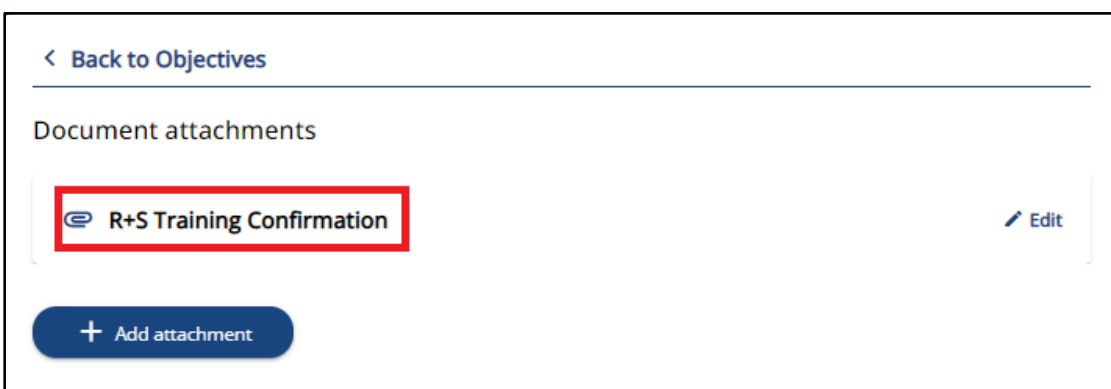

- Click the Delete button to remove the document, as below.
- Click Confirm to delete the file or Cancel to cancel the deletion, as below.

Document attachment details

Close ✕

* Document name (required)

R+S Training Confirmation

Existing filename

Objective Supporting Document.do ⬇

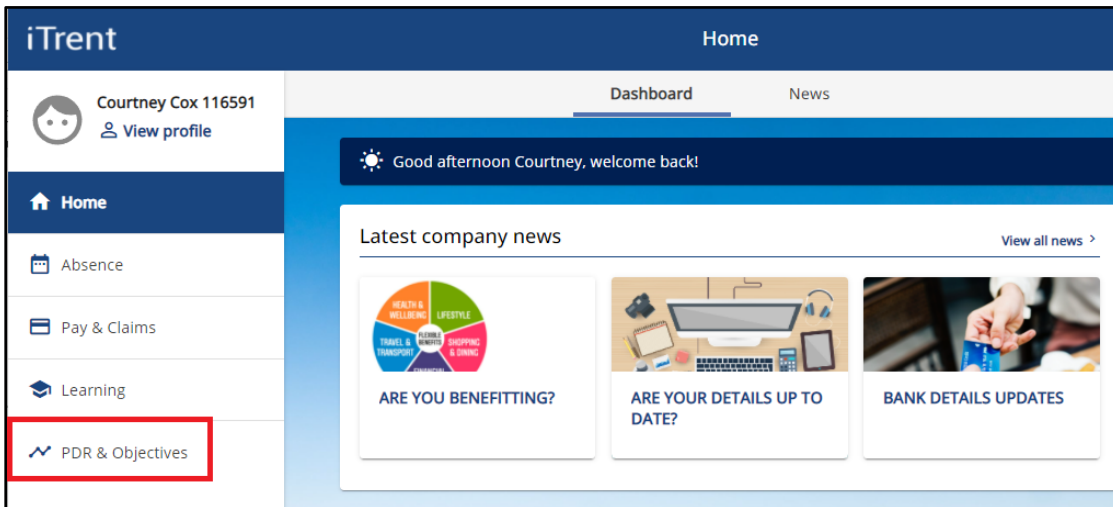**+ Upload file**   No file selected

Save   **Delete**   **Cancel**

Delete record?

Close ✕

⚠ Are you sure you want to delete this record?

Confirm   **Cancel**

- 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.
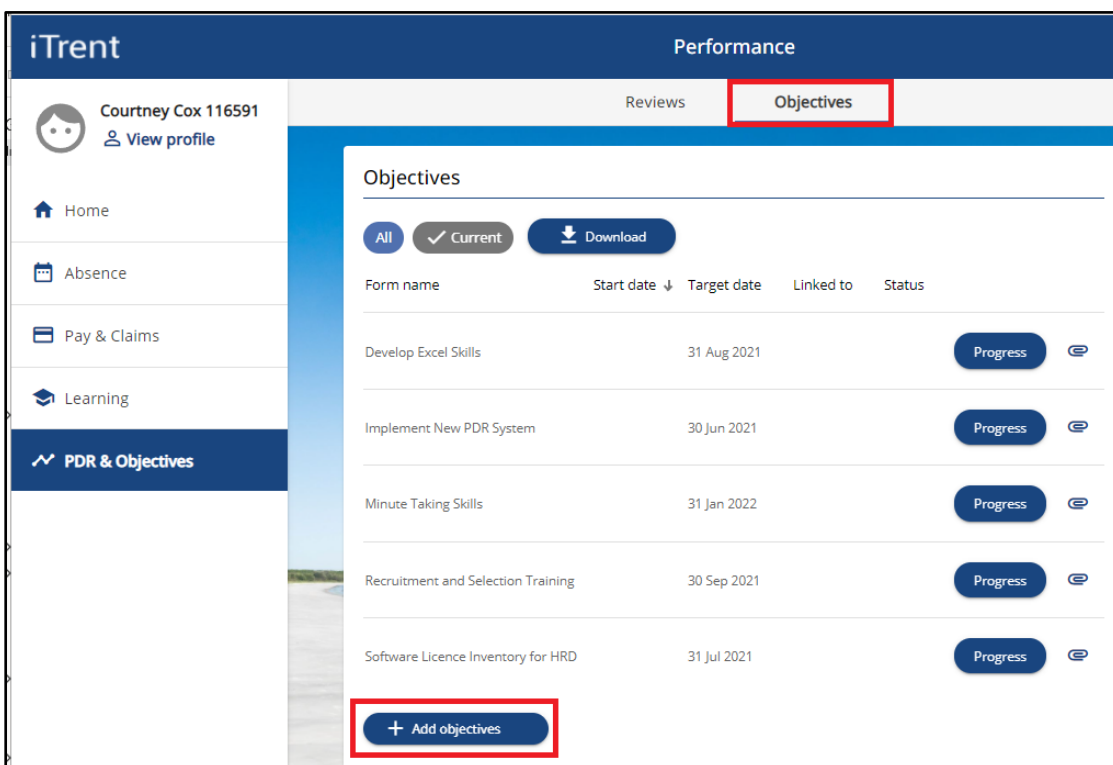
- When you click on the Add Objectives button, a new window will open as below.
- Objective Title > create an appropriate name for your objective summary, eg PDR Objectives Overview 2023.
- Objective Type > select either Work Based or Development.
- Attachment Date – add the start date of the PDR cycle, 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.

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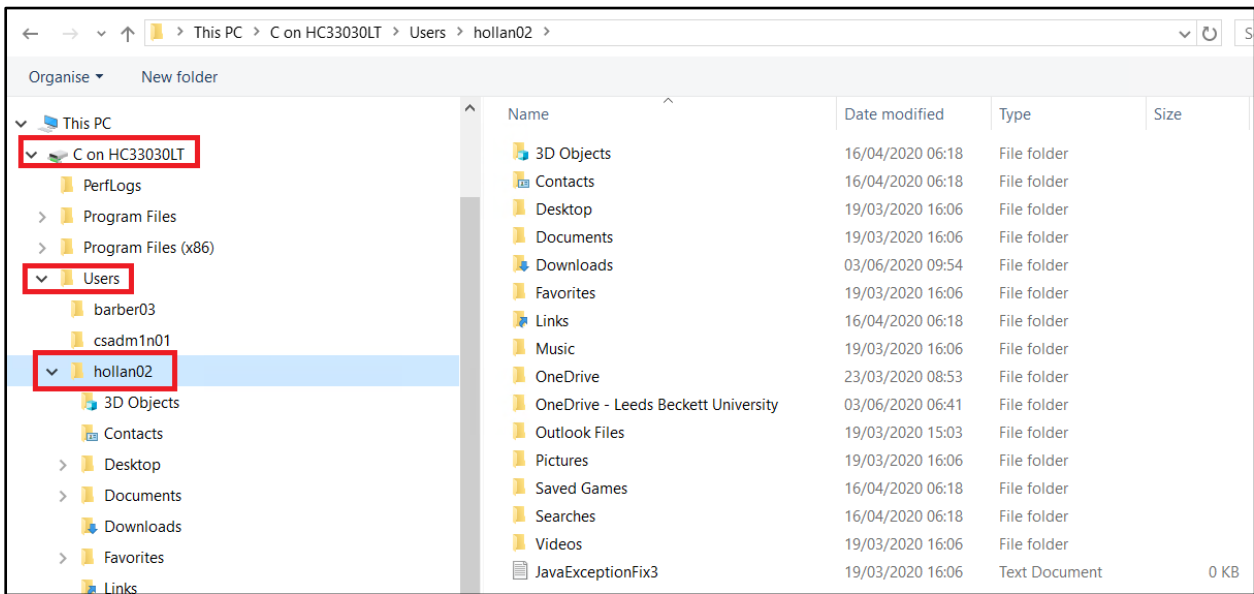
- Once the objective has been saved, the Objectives screen will display as below.