

## Overview

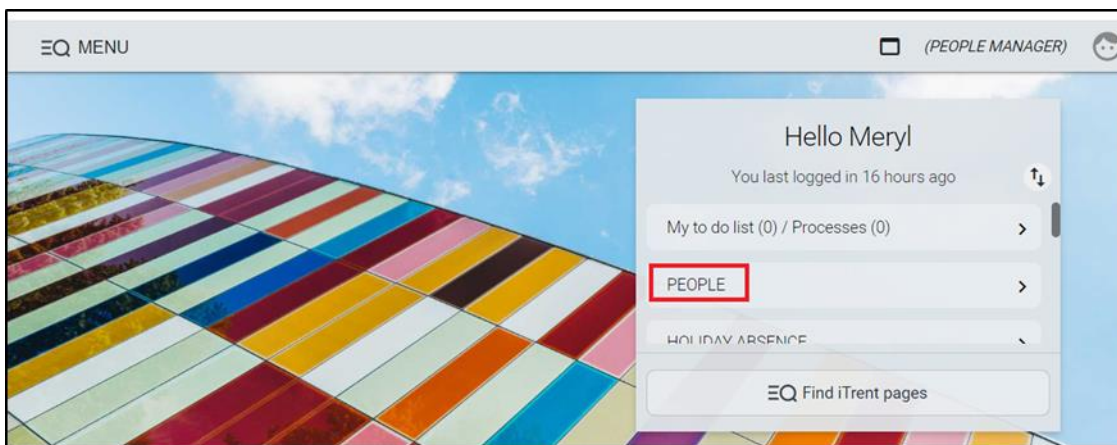
- The annual PDR discussion is recorded separately from objectives in iTrent.
- To start the process, the reviewer generates the review lifecycle.
- The reviewer then records the PDR discussion date and adds their summary comments.
- The reviewer can also upload supporting documents to the review form in iTrent.
- You might wish to share and confirm your comments outside of iTrent before submitting them.
- You can save the Reviewer Summary section of the form and submit it at a later stage.
- Once submitted, the details cannot be amended.
- Once the Reviewer Summary is submitted, the reviewee will receive an email notification.
- The reviewee can then login, view your comments and record, save and submit their own comments.
- Once the reviewee submits their comments, the process is complete in iTrent.

This guide covers the following actions.

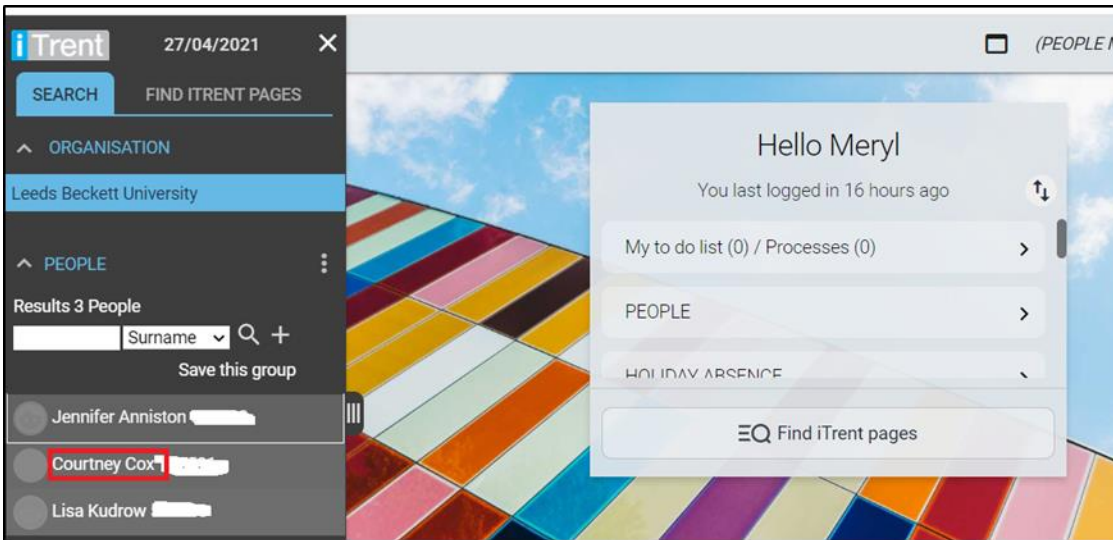
- Generating the PDR lifecycle.
- Recording the PDR discussion date and your reviewer summary comments.
- Submitting the reviewer summary section of the review form.
- Uploading supporting documents to the review form in iTrent.

## GENERATE THE PDR LIFECYCLE

- Login to Manager Self-Service and select the People section, as below.



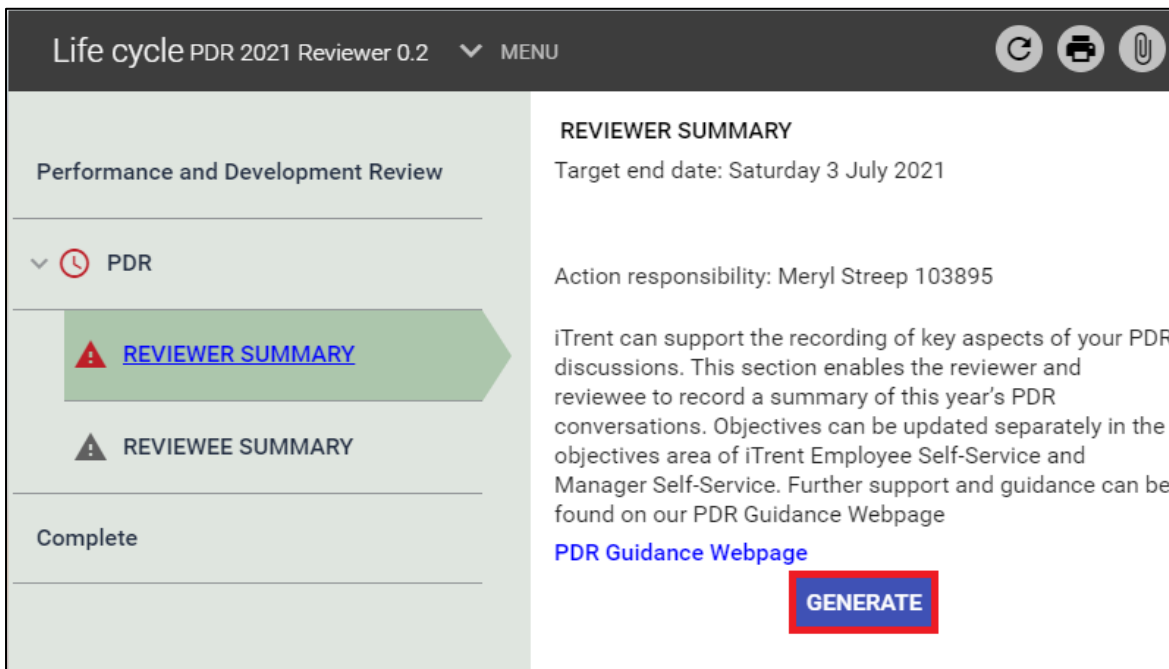
- Select one of your team from the list displayed in the left-hand pane, as below.



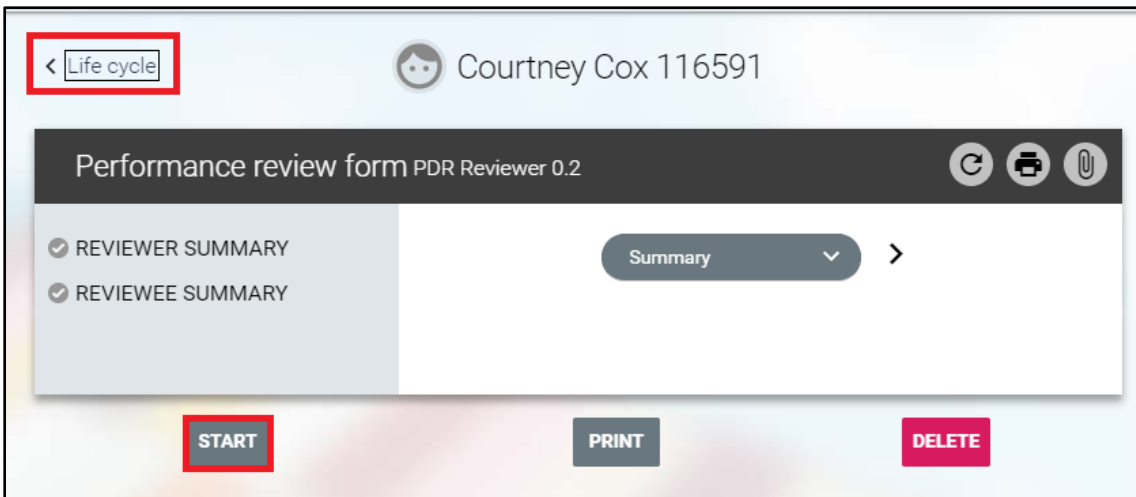
- The person summary screen will then display.
- Scroll down and click the development and PDR record folder as below.



- Click the PDR lifecycle link, as above, to access the lifecycle screen, as below.
- Click the Generate button to generate the lifecycle form.

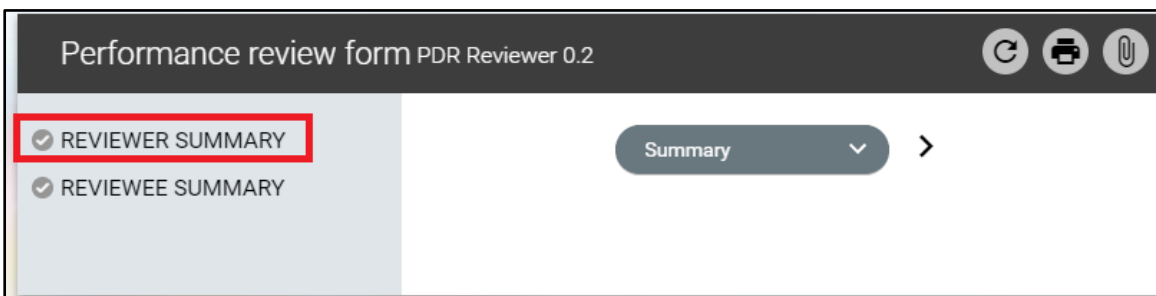


- After generating, the lifecycle form will open, as below.
- Click on the < Life cycle link, as below, to close the screen and record the PDR discussion at a later time.
- Click the Start button, as below, to access the review date screen and record the discussion date and your reviewer comments.

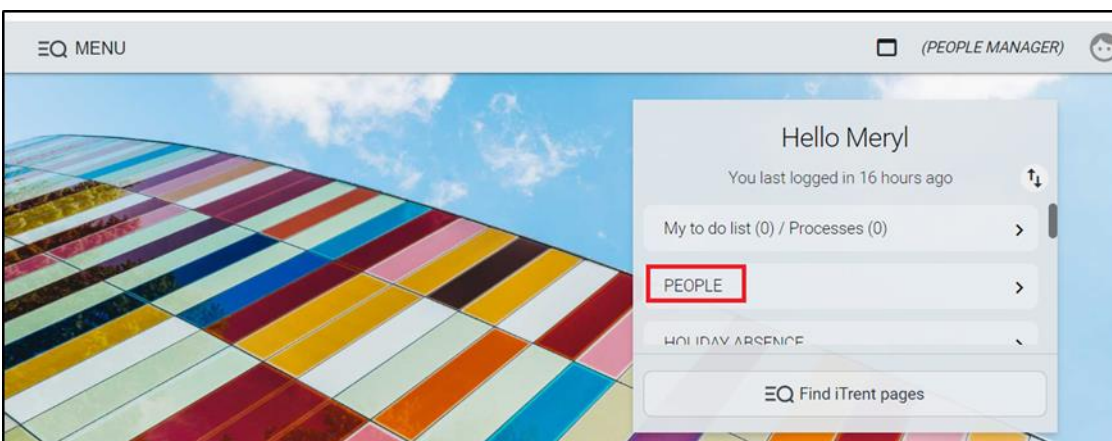


## RECORD THE PDR DISCUSSION DATE AND REVIEWER COMMENTS

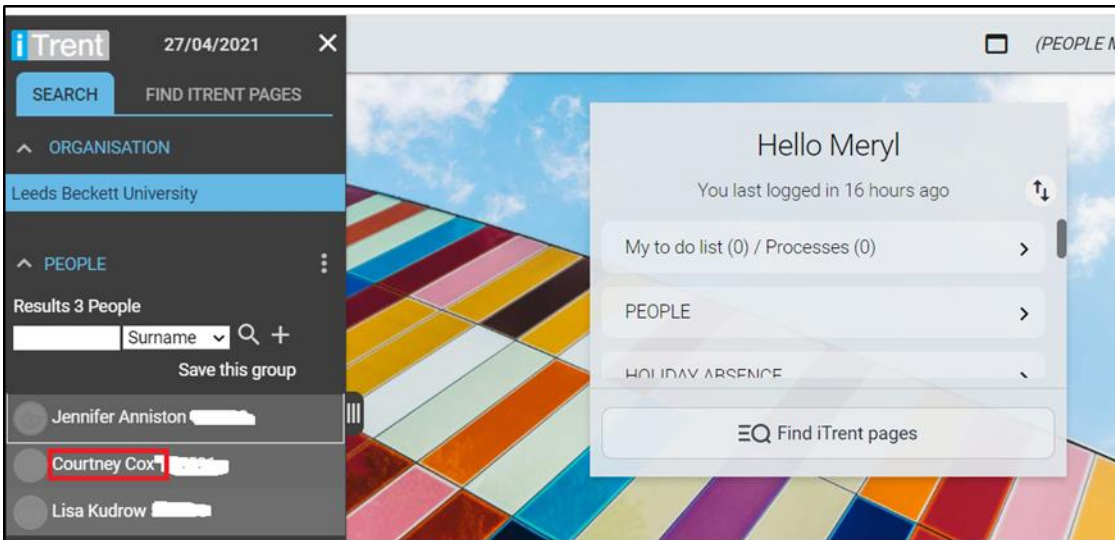
- We recommend that you record these details after the PDR discussion takes place.
- You can save these details and submit the screen at a later stage.
- Once you submit this screen, these details cannot be amended in iTrent.
- If you wish to upload any documents, you must do this before the form is completed in iTrent.
- If clicking Start straight after generating the lifecycle form, click on the Reviewer Summary link, as below.



- If recording these details separately from generating the form, login to Manager Self-Service and select the People section, as below.



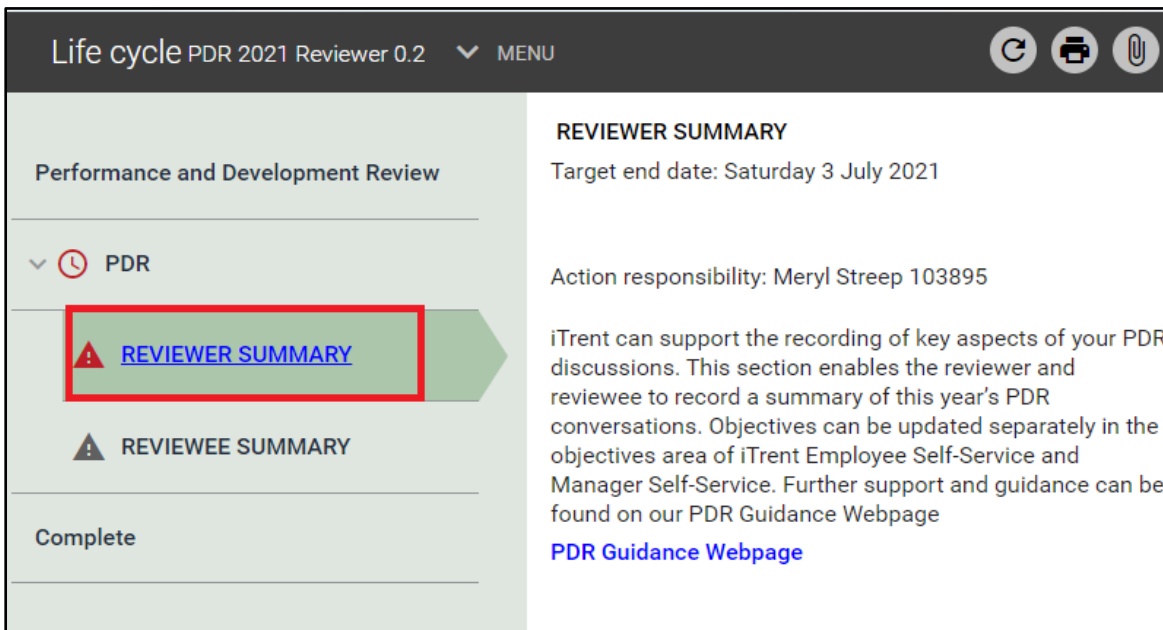
- Select one of your team from the list displayed in the left-hand pane, as below.



- The person summary screen will then display.
- Scroll down and click the development and PDR record folder as below.



- Click the PDR lifecycle link, as above, to access the lifecycle screen, as below.
- Click the reviewer summary link, as below, to access the form.



- Click the reviewer summary link, as below, to access this section of the form.

Performance review form PDR Reviewer 0.2

REVIEWER SUMMARY
  REVIEWEE SUMMARY

Summary >

- Add the discussion date and your reviewer comments and click Save to save the changes, as below
- You can save these details and submit them at a later stage. Once submitted they cannot be amended.
- You might wish to share and confirm your comments outside of iTrent before submitting them.
- When you submit this screen, your reviewee will receive an email notification.
- You must submit your comments before the reviewee can add their own comments.
- If you wish to upload any documents to the review form, you must do this before the form is finalised in iTrent.

Performance review form REVIEWER SUMMARY (1 of 2)

REVIEWER SUMMARY

Employee Name	Courtney Cox 116591
Job title	Actor 308182
Reporting manager	Meryl Streep 103895
Reporting manager job title	Director 299700
Period of time in job	2 year(s) 6 month(s)
Review date (editable)	28/07/2021

Reviewer Summary

Further support and guidance can be found on our [PDR Guidance Webpage here](#)

Now that your PDR discussion has taken place, please record your final comments. What aspects of the PDR conversation do you want to highlight?

Once you have saved and submitted your comments, you cannot make any amendments. Please share and confirm your comments with the reviewee if required before submitting.

Reviewer Summary Comments

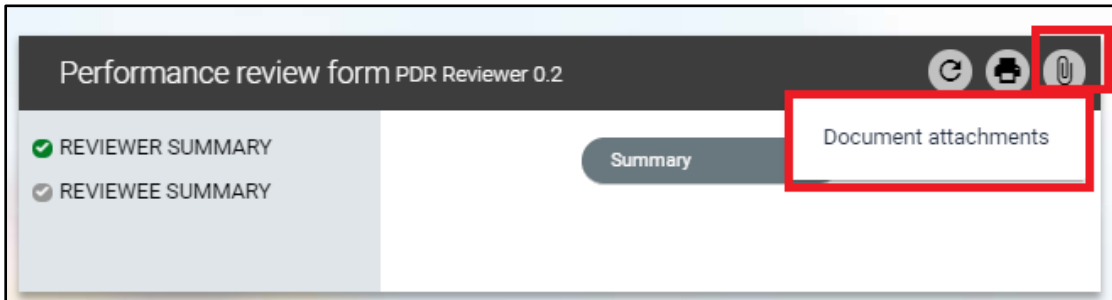
The manager adds their reviewer comments here.

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and send a notification to your reviewee to let them know. They will then be able to access this form and add their own comments. Once the reviewee has updated and submitted the form, no further changes can be made. You can continue to update work and development objectives throughout the year via the Objective Summary screen in Manager Self-Service.

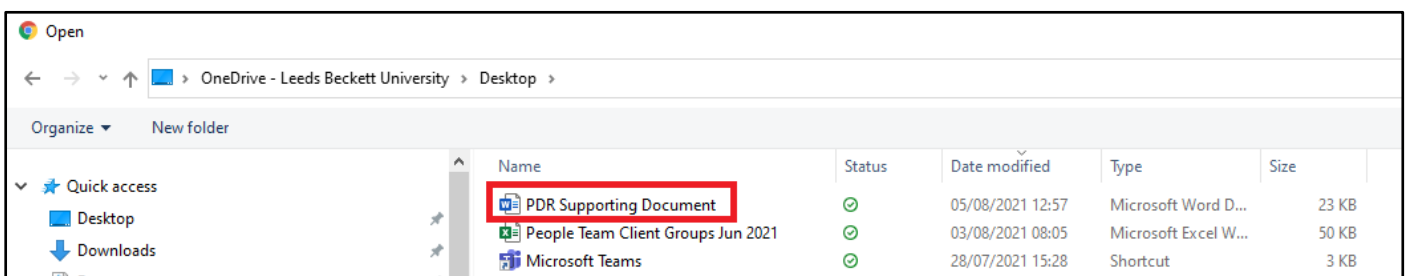
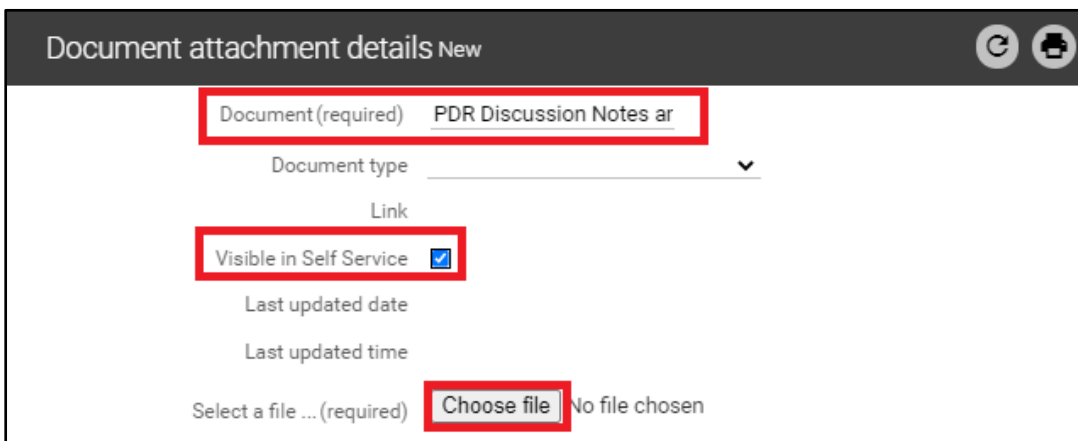
PREVIOUS SAVE SUMMARY NEXT

## UPLOAD SUPPORTING DOCUMENTS

- If you wish to upload any documents to the review form, you should do this before the form is finalised in iTrent.
- From the review form, click the paperclip icon, as below.
- Click the Document Attachments link that then displays, as below.



- A new document attachment details window will open, as below.
- Complete this screen as below.
- Create an appropriate name for the document.
- Leave the Document Type blank.
- Select the View in Self-Service tick-box so the document is visible to the reviewee, if they wish to access.
- Click Choose File and browse your PC/device for the document to be uploaded.
- Click Save.



Document attachment details New

Document (required) PDR Discussion Notes ar

Document type \_\_\_\_\_ ▾

Link

Visible in Self Service

Last updated date

Last updated time

Select a file ... (required)  PDR Supporti...cument.docx

- A confirmation message will display, as below, when the document is uploaded.

Changes have been saved.

Document attachment details PDR Discussion Notes and Outcome 28-07-21

Document (required) PDR Discussion Notes ar

Document type \_\_\_\_\_ ▾

Link

Visible in Self Service

Last updated date 05/08/2021

Last updated time 13:13

Replace by ...  No file chosen

- Click on the < Performance Review Form link to return to the review form, as below.

Courtney Cox 116591

Changes have been saved.

Document attachment details PDR Discussion Notes and Outcome 28-07-21

Document (required) PDR Discussion Notes ar

Document type \_\_\_\_\_ ▾

Link

Visible in Self Service

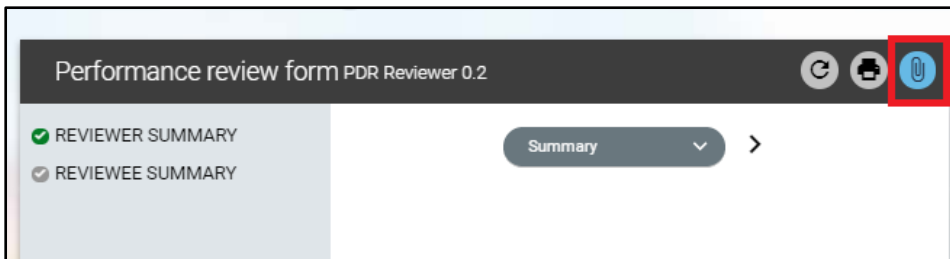
Last updated date 05/08/2021

Last updated time 13:13

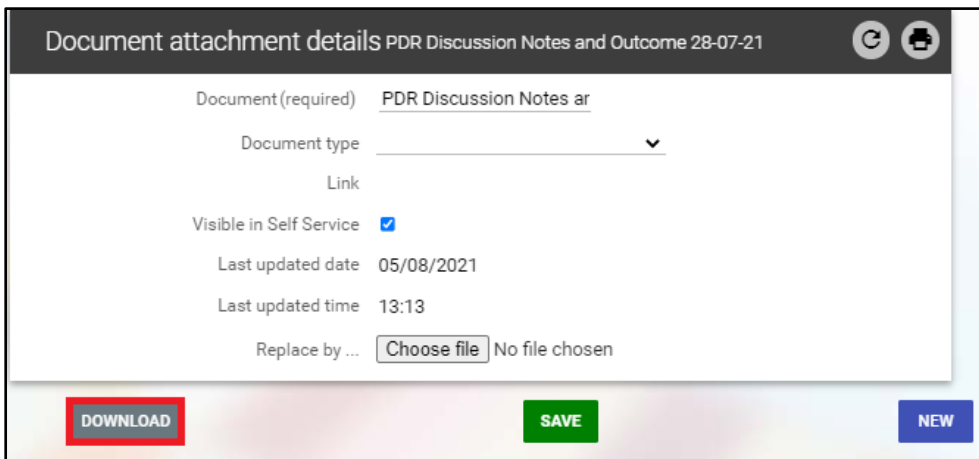
Replace by ...  No file chosen

- A blue paperclip icon denotes that supporting documents have been attached, as below.





- To view/download the documents at any time, click on the paperclip.
- Click the Document Attachments link that then displays.
- Click the Download button to view the document.



## SUBMIT THE REVIEWER SUMMARY SCREEN

- You should only submit this screen when you are happy no (further) changes are required.
- You might wish to share and confirm your comments outside of iTrent before submitting them.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- When you submit your comments, your reviewee will receive an email notification.
- You must submit your comments before the reviewee can add their own comments.
- From the reviewer summary section of the form, click the Summary button, as below.



Performance review form REVIEWER SUMMARY (1 of 2)

REVIEWER SUMMARY

Employee Name Courtney Cox 116591  
 Job title Actor 308182  
 Reporting manager Meryl Streep 103895  
 Reporting manager job title Director 299700  
 Period of time in job 2 year(s) 6 month(s)  
 Review date (editable) 28/07/2021

Reviewer Summary

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Now that your PDR discussion has taken place, please record your final comments. What aspects of the PDR conversation do you want to highlight?

Once you have saved and submitted your comments, you cannot make any amendments. Please share and confirm your comments with the reviewee if required before submitting.

Reviewer Summary Comments

The manager adds their reviewer comments here.

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and send a notification to your reviewee to let them know. They will then be able to access this form and add their own comments. Once the reviewee has updated and submitted the form, no further changes can be made. You can continue to update work and development objectives throughout the year via the Objective Summary screen in Manager Self-Service.

PREVIOUS SAVE SUMMARY NEXT

- The review form summary screen will open as below.
- Click the Submit button to submit this section of the form.

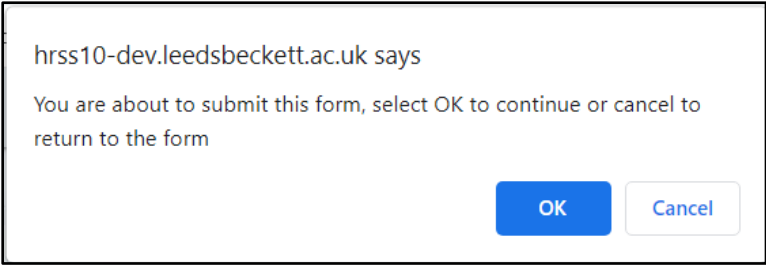
Performance review form PDR Form

REVIEW DATE  
 REVIEWER SUMMARY  
 REVIEWEE SUMMARY

Summary

START SUBMIT PRINT DELETE

- You will be asked to confirm this action.
- Click OK to submit or Cancel to exit without submitting.



- Once you submit this section of the form will display a message that it cannot be modified, as below.

