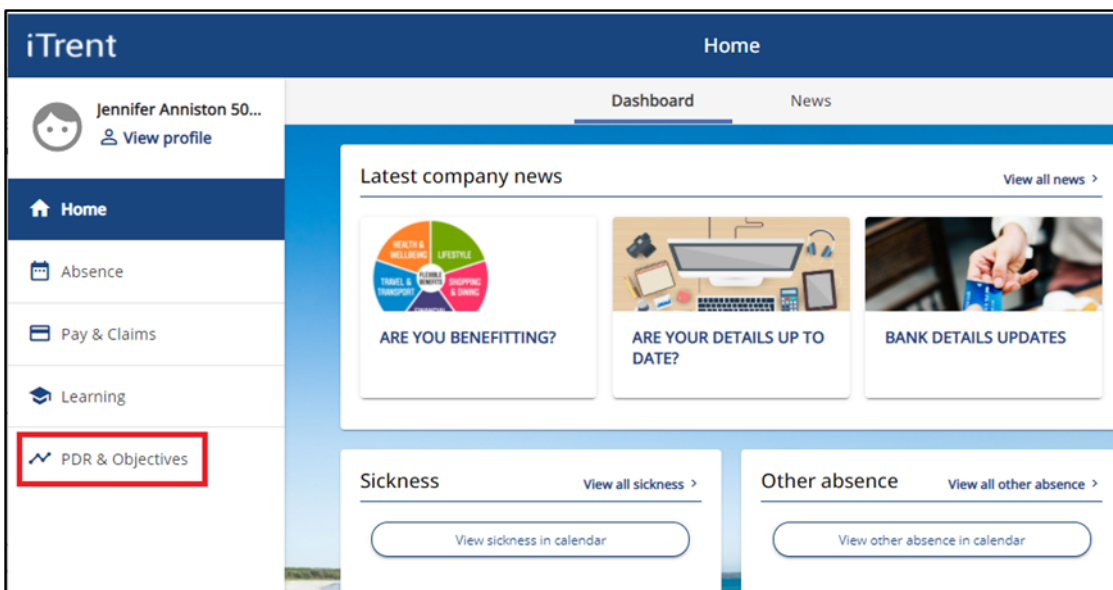Overview

- If your reviewer is not your manager, they will not have access to your details via iTrent.
- You can still use iTrent to record your PDR discussion date.
- You will need to complete a "paper" copy using the Word template
- If you wish, you can attach the completed form to your PDR review form in iTrent.
- You can attach more than one document to your review form.
- Your manager will be able to view any documents attached via Manager Self-Service.

This guide covers the following actions.

- Attaching documents to your review form.

ATTACH DOCUMENTS TO YOUR REVIEW FORM

- You must generate the review lifecycle and record the discussion date before you can attach any documents.
- See the separate guide on How to Generate Your Review Lifecycle.

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

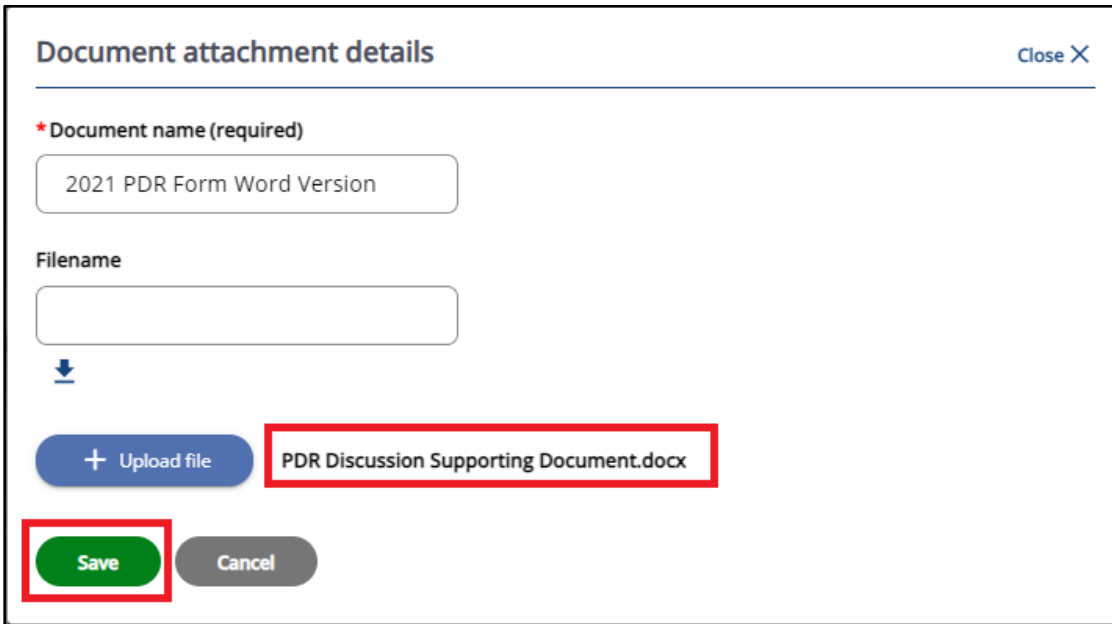- Scroll down to the Review Forms section nd click on the paperclip icon as below.

- A new document attachments window will open, as below.
- Click on the Add Attachment button to browse for and select the document to be attached.

- A new document attachments window will open, as below.
- Create an appropriate name for the attachment.
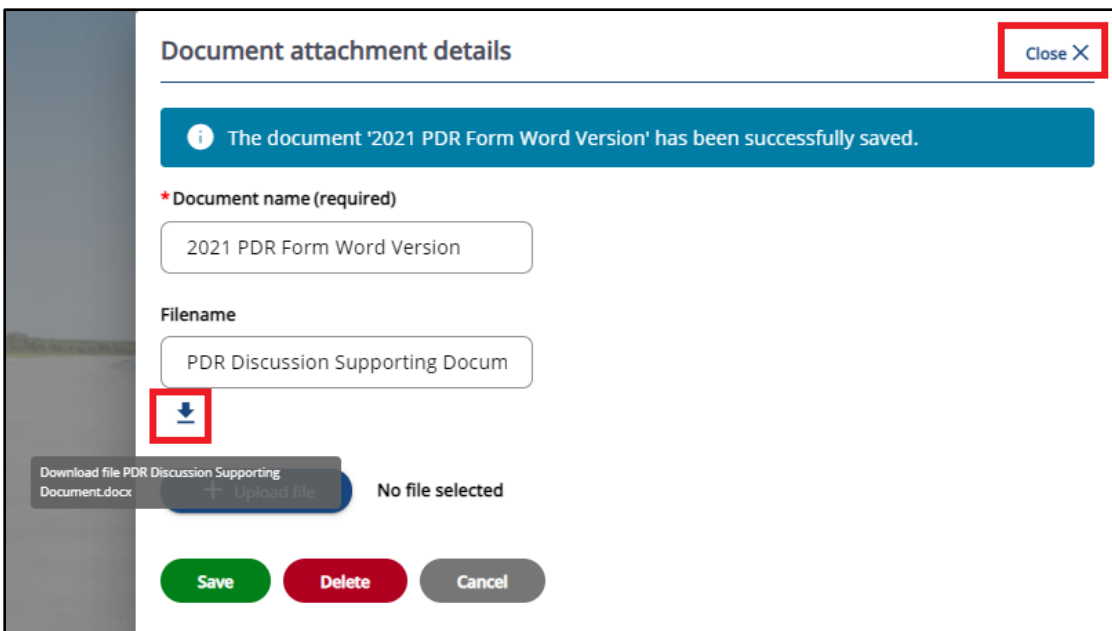- Click Upload File to browse for the document, as below.

- Browse for and select the document to be attached.
- Click Save to attach the document to your review form, as below.

- When saved, the screen will display as below.
- You can download the document via the down-arrow icon highlighted below.
- You can also add further documents or delete documents.
- Click the Close link to close this window.

- Click the Back to Review link to return to the main Reviews screen.

< Back to Reviews

Document attachments

📎 2021 PDR Form Word Version   ✏ Edit

➕ Add attachment