

Overview

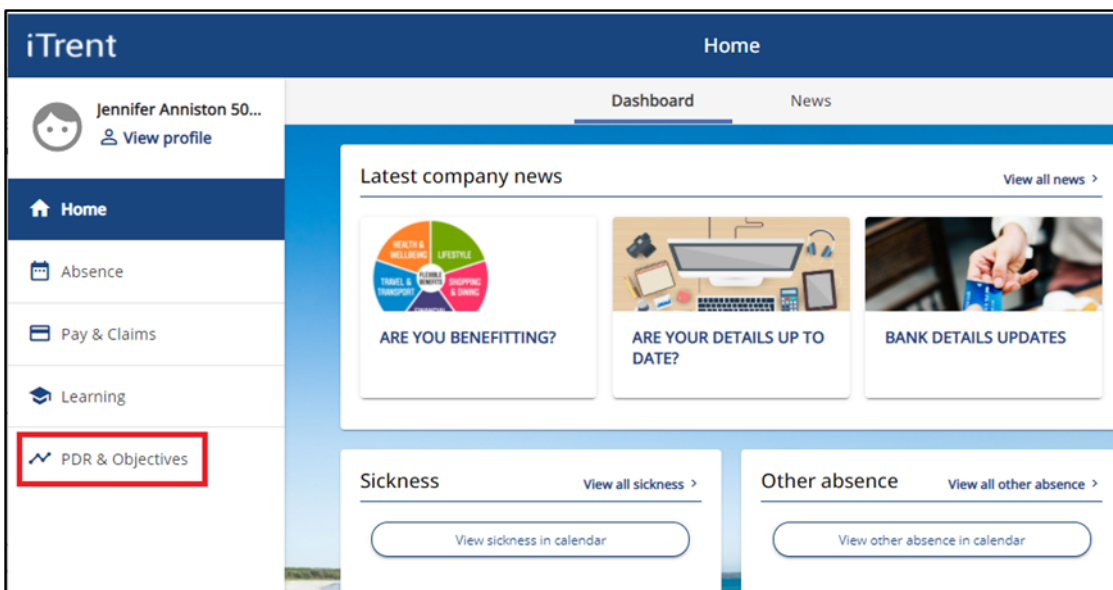
- If your reviewer is not your manager, they will not have access to your details via iTrent.
- You can still use iTrent to record your PDR discussion date.
- You will need to complete a “paper” copy using the [Word template](#)
- If you wish, you can attach the completed form to your PDR review form 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 and click on the paperclip icon as below.

The screenshot shows the iTrent Performance interface. On the left is a navigation menu with options like Home, Absence, Pay & Claims, Learning, and PDR & Objectives. The main content area is titled 'Performance' and has tabs for 'Reviews' and 'Objectives'. Under 'Reviews', there are two sections: 'Review Lifecycles' and 'Review Forms'. The 'Review Forms' section contains a table with columns: Form name, Start date, End date, Due date, Status, Rating, and Attachments. The first row in the table is 'PDR Reviewer 0.2' with a status of 'In progress'. A red box highlights the 'Add Attachment' icon in the Attachments column of this row.

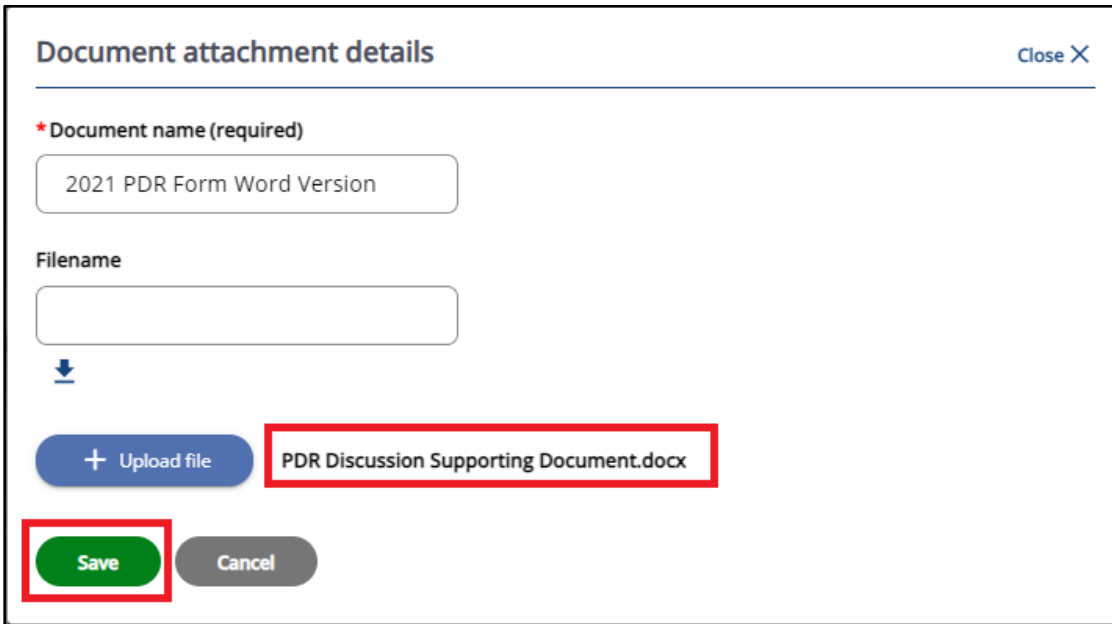
- A new document attachments window will open, as below.
- Click on the Add Attachment button to browse for and select the document to be attached.

The screenshot shows a 'Document attachments' window. At the top left is a 'Back to Reviews' link. Below it, the text 'Document attachments' is displayed, followed by the message 'No attachments have been added yet'. At the bottom left, there is a blue button with a plus sign and the text 'Add attachment', which is highlighted with a red box.

- 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.

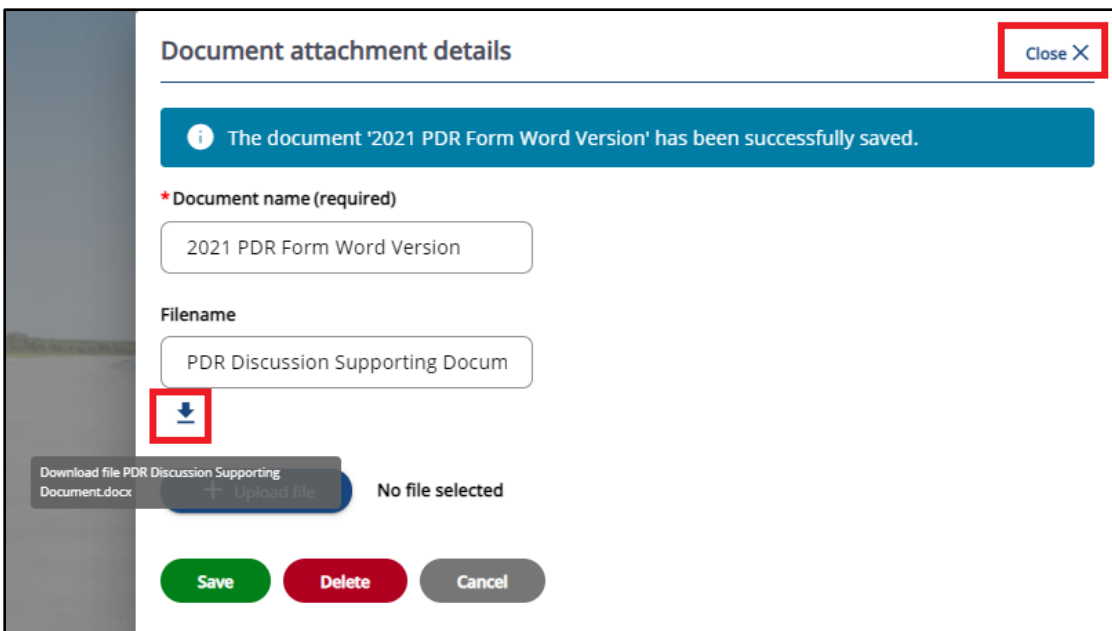
The screenshot shows the 'Document attachment details' form. It has a 'Close X' button in the top right corner. The form contains a required field for 'Document name' with the value '2021 PDR Form Word Version'. Below this is a 'Filename' field. At the bottom left, there is a blue button with a plus sign and the text 'Upload file', which is highlighted with a red box. To the right of this button is the text 'No file selected'. At the bottom of the form are 'Save' and 'Cancel' buttons.

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



The screenshot shows a form titled "Document attachment details" with a "Close X" link in the top right. The form contains a required field for "Document name" with the value "2021 PDR Form Word Version". Below it is a "Filename" field. A blue button with a plus sign and the text "Upload file" is visible. To its right, a file name "PDR Discussion Supporting Document.docx" is displayed in a red-bordered box. At the bottom left, a green "Save" button is highlighted with a red box, and a grey "Cancel" button is to its right. A blue down-arrow icon is positioned above the "Upload file" button.

- 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.




The screenshot shows the "Document attachment details" form after a successful save. A blue notification bar at the top states: "The document '2021 PDR Form Word Version' has been successfully saved." The "Document name" field still contains "2021 PDR Form Word Version". The "Filename" field now contains "PDR Discussion Supporting Docum". A blue down-arrow icon is highlighted with a red box. Below the filename field, a file preview area shows "Download file PDR Discussion Supporting Document.docx" and "No file selected". At the bottom, there are three buttons: a green "Save" button, a red "Delete" button, and a grey "Cancel" button. The "Close X" link in the top right is also highlighted with a red box.


- 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