

Overview

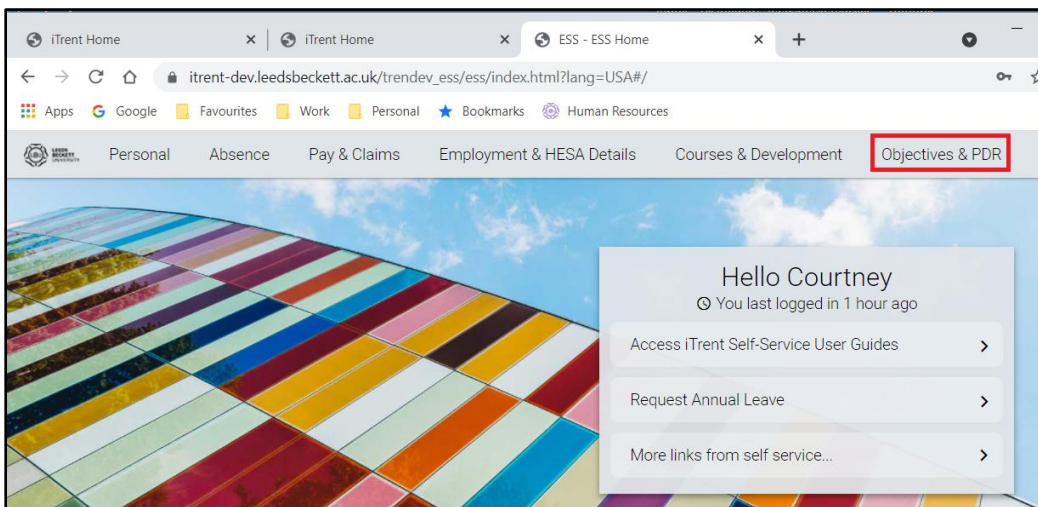
- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, your reviewer will generate the review lifecycle.
- After the PDR discussion, your reviewer will record the discussion date and their summary comments.
- They may also upload supporting documents to the review form in iTrent.
- Your manager might wish to share and confirm their comments outside of iTrent before submitting them.
- Once their comments are submitted, you will receive an email notification.
- At this point, you can login, view their comments and record, save and submit your own comments.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- Once the reviewer and reviewee comments have been submitted, the process is complete in iTrent.

This guide covers the following actions.

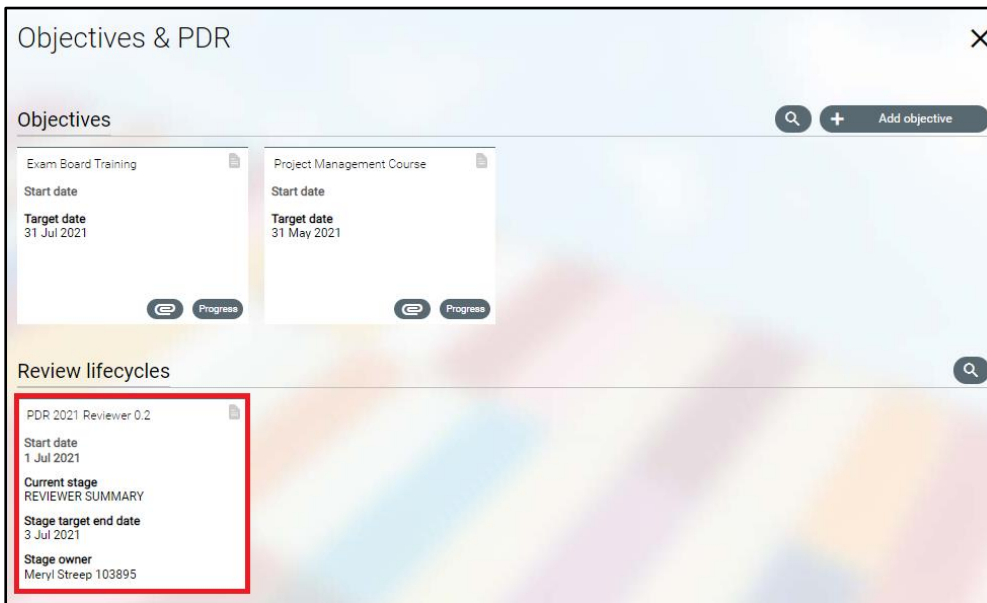
- Accessing your PDR lifecycle (form).
- Viewing your reviewer's summary comments.
- Viewing any documents uploaded to your review form.
- Recording your reviewee summary comments.
- Complete your review lifecycle (form).

ACCESS YOUR PDR LIFECYCLE (FORM)

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



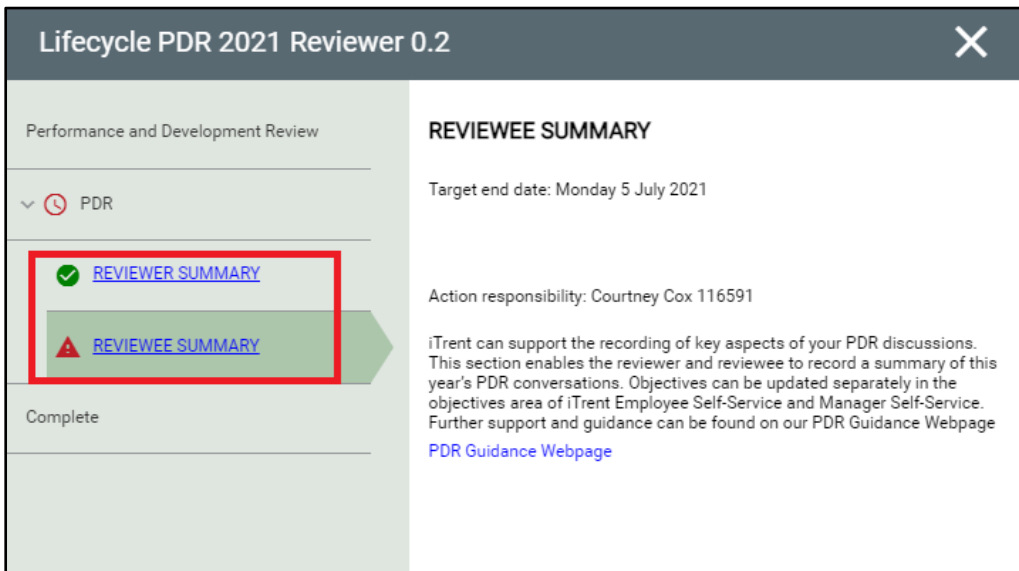
- Click on the review lifecycle tile, as below.



- If your reviewer hasn't completed and submitted the reviewer summary section, the reviewee summary link will not be active and the form will not be available for you to view or input, as below.
- To close the screen, click the white X icon.

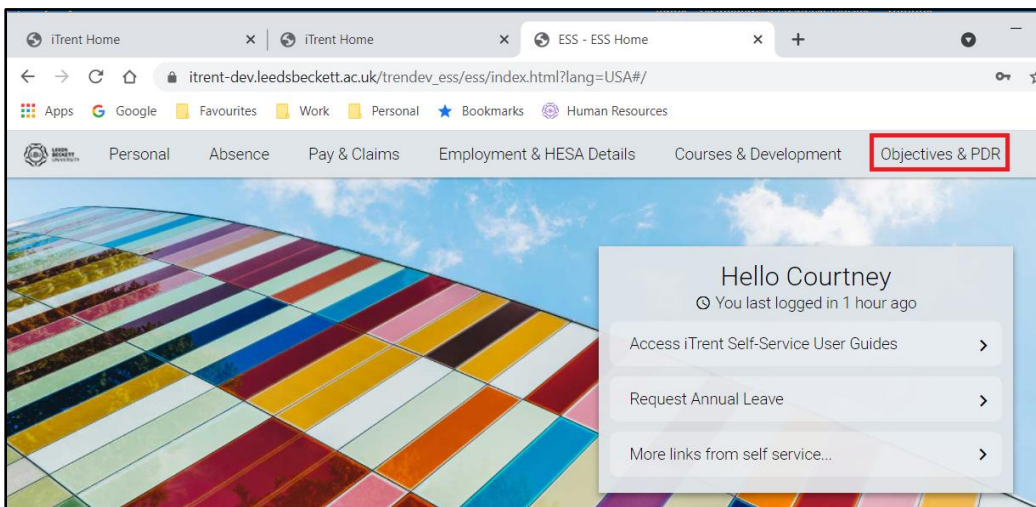


- If your review has completed and submitted their reviewer summary section, the links will be active, as below, and you can view their comments and add your own summary comments.
- To close the screen, click the white X icon.



VIEW YOUR REVIEWER'S SUMMARY COMMENTS

- After the PDR discussion, your manager can record, save and submit their comments.
- Your manager might wish to share and confirm their comments outside of iTrent before submitting.
- Once their comments are submitted, you will receive an email notification.
- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.



- At this point the lifecycle tile will show you as the stage owner and the current stage as reviewee summary.
- Click on the review lifecycle tile, as below.

Objectives

Form name	Start date	Target date	Linked to	Current status
Develop Excel Skills		31 Aug 2021		Authorised
Exam Board Training		30 Jun 2021		Authorised
Implement New PDR Syst...		30 Jun 2021		Authorised
Minute Taking Skills				Authorised

Review lifecycles

PDR 2021 Reviewer 0.2

Start date
1 Jul 2021

Current stage
REVIEWEE SUMMARY

Stage target end date
5 Jul 2021

Stage owner
Courtney Cox 116591

- The lifecycle screen will open, as below.
- Click on the reviewer summary link, as below.

Lifecycle PDR 2021 Reviewer 0.2

Performance and Development Review

PDR

✓ REVIEWER SUMMARY

REVIEWEE SUMMARY

Target end date: Monday 5 July 2021

Action responsibility: Courtney Cox 116591

iTrent can support the recording of key aspects of your PDR discussions. This section enables the reviewer and reviewee to record a summary of this year's PDR conversations. Objectives can be updated separately in the objectives area of iTrent Employee Self-Service and Manager Self-Service. Further support and guidance can be found on our PDR Guidance Webpage [PDR Guidance Webpage](#)

- The lifecycle form will open as below.
- Click on the reviewer summary link, as below.

Lifecycle PDR Reviewer 0.2

✓ REVIEWER SUMMARY

✓ REVIEWEE SUMMARY

Click here to return to the performance life cycle

Summary

- The reviewer summary section of the lifecycle form will open, as below.
- Scroll down to read your reviewer's comments.
- Click the white X icon to close the screen.

Lifecycle PDR Reviewer 0.2 (REVIEWER SUMMARY) (1 of...)

[Click here to return to the performance life cycle](#)

< REVIEWER SUMMARY >

i This page is for Meryl Streep 103895 to complete

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.

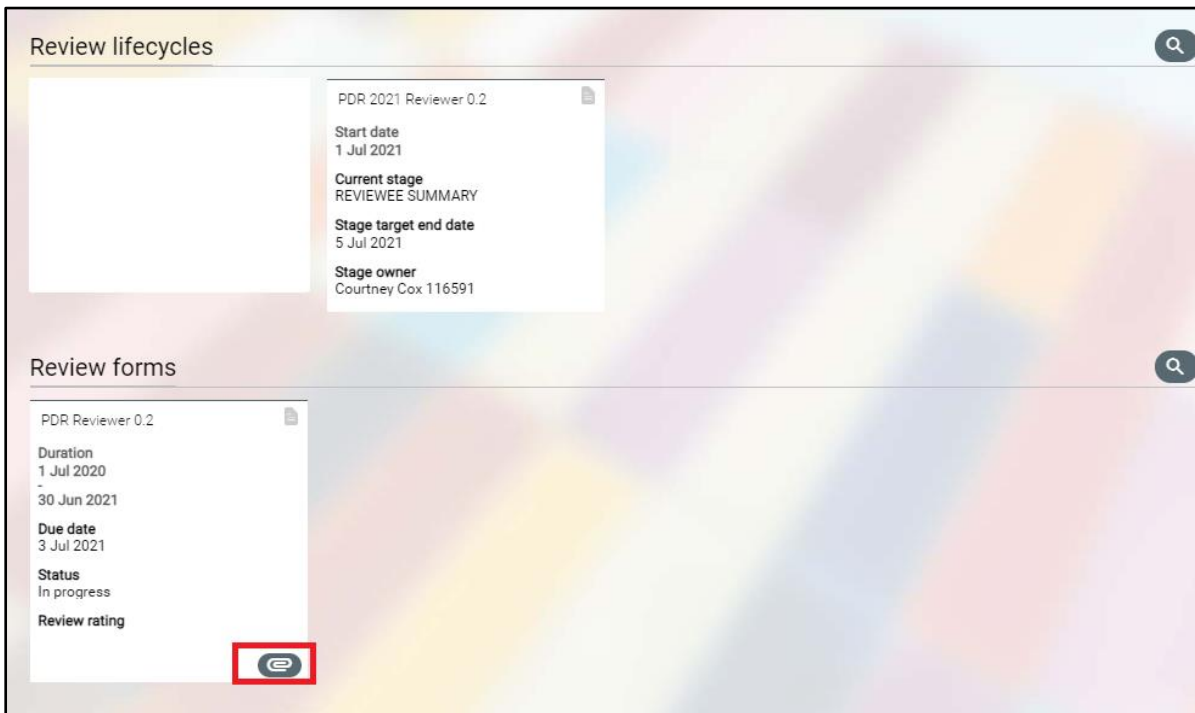
Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and send a notification to your reviewee to let them know. They will then be able to access this form and add their own comments. Once the reviewee has updated and submitted the 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 Summary **Next**

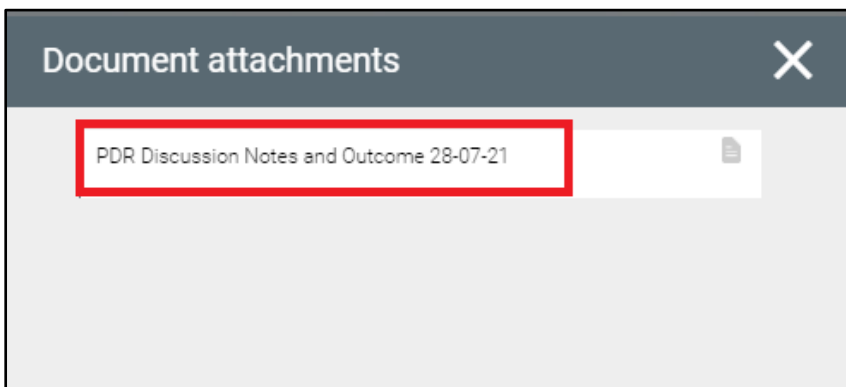
VIEW UPLOADED SUPPORTING DOCUMENTS

- You can view any supporting documents uploaded by your manager.
- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.

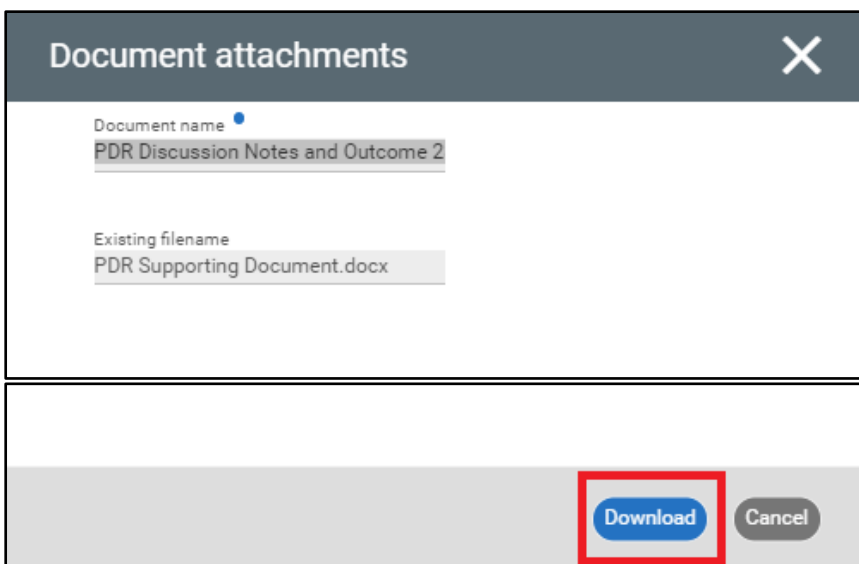
- Click on the review form tile paperclip icon, as below.



- A new document attachments window will open, as below.
- This will list any documents that have been uploaded to your review form.
- To view/download the documents, click on the document name, as below.

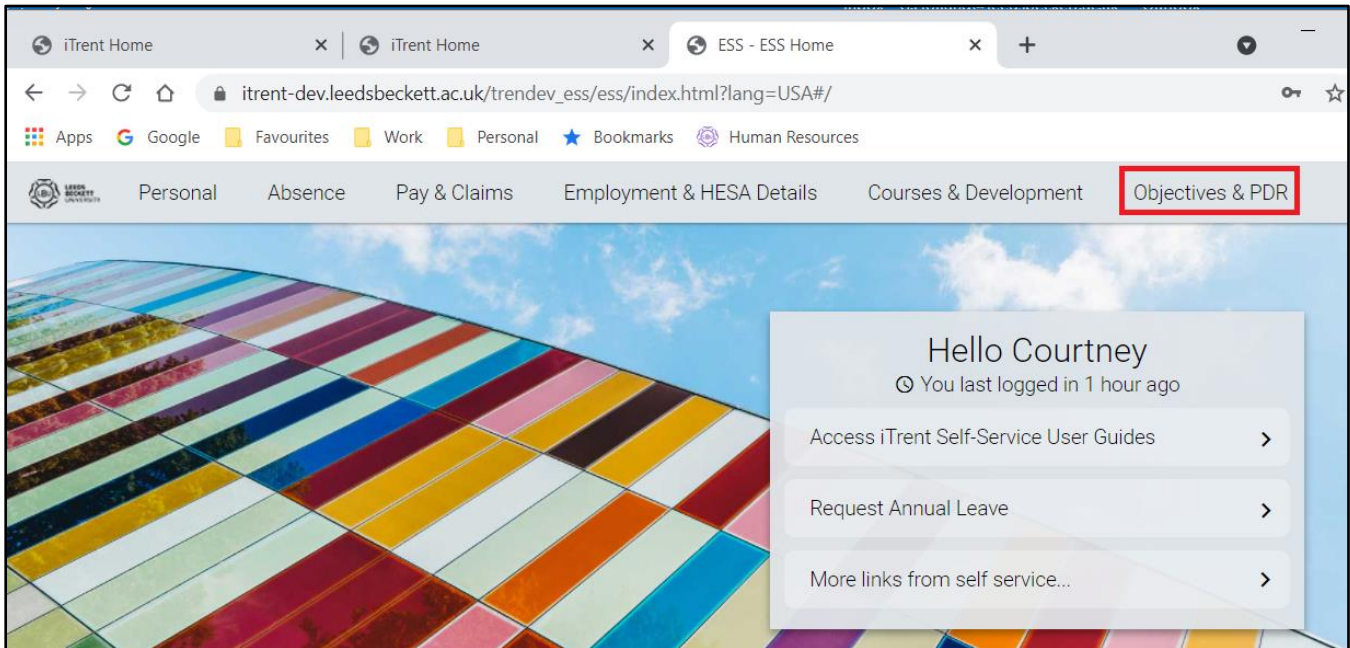


- A new window will open from where you can click the Download button, as below.
- Click Cancel to exit this screen.

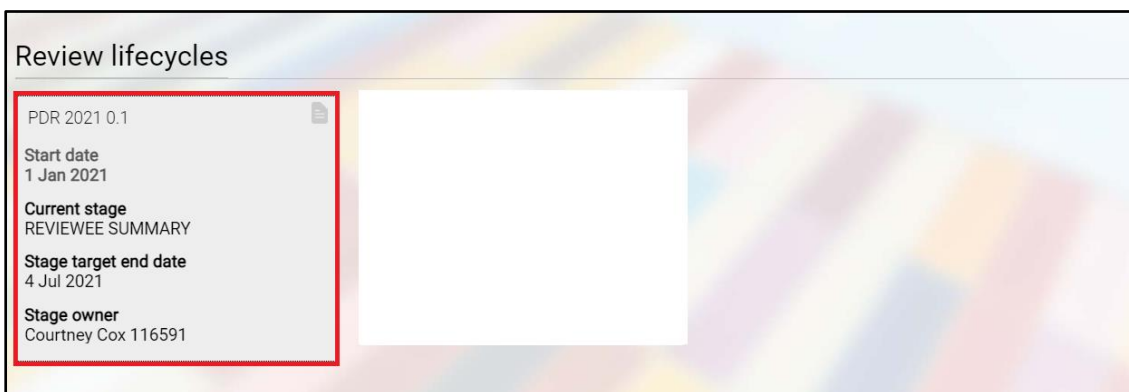


RECORD YOUR REVIEWEE COMMENTS

- You will not be able to record your comments until your reviewer has submitted their comments.
- You will receive an email notification when your reviewer has submitted their comments.
- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.



- At this point the lifecycle tile will show you as the stage owner and the current stage as reviewee summary.
- Click on the review lifecycle tile, as below.



- The lifecycle screen will open, as below
- Click on the reviewee summary link, as below.

Lifecycle PDR 2021 Reviewer 0.2 ✕

Performance and Development Review

▼ ⌚ PDR

✔ REVIEWER SUMMARY

⚠ REVIEWEE SUMMARY

Complete

REVIEWEE SUMMARY

Target end date: Monday 5 July 2021

Action responsibility: Courtney Cox 116591

iTrent can support the recording of key aspects of your PDR discussions. This section enables the reviewer and reviewee to record a summary of this year's PDR conversations. Objectives can be updated separately in the objectives area of iTrent Employee Self-Service and Manager Self-Service. Further support and guidance can be found on our [PDR Guidance Webpage](#)

- The lifecycle form will open as below.
- Click on the reviewee summary link, as below.

Lifecycle PDR Reviewer 0.2 ✕

✔ REVIEWER SUMMARY

✔ REVIEWEE SUMMARY

[Click here to return to the performance life cycle](#)

Summary ▼ >

- The reviewee summary section of the lifecycle form will open, as below.
- Scroll down to record your reviewee comments.
- Click Save to save your changes.

Lifecycle PDR Form (REVIEWEE SUMMARY) (3 of 3) ✕

[Click here to return to the performance life cycle](#)

< REVIEWEE SUMMARY ▼

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

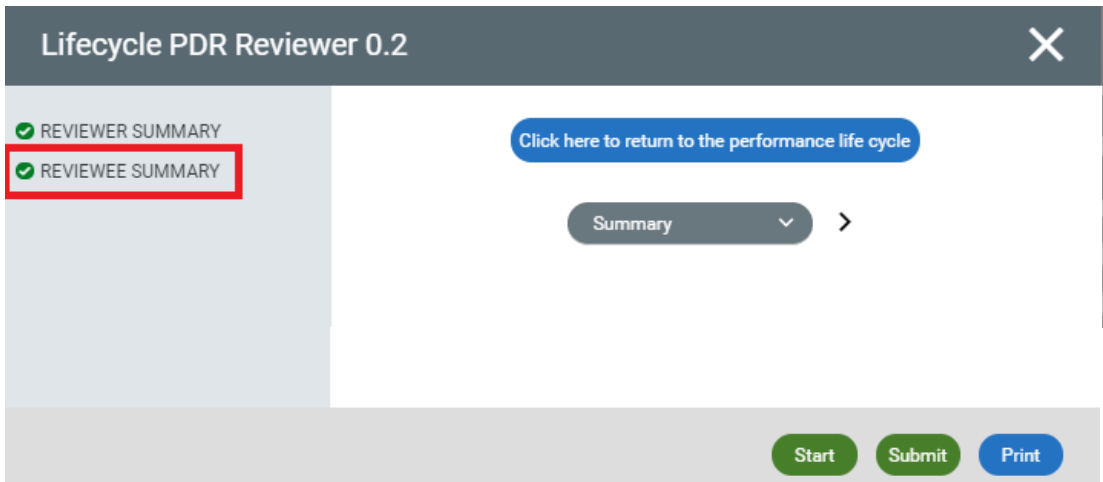
Now that your PDR discussion has taken place, please record your final comments. What aspects of the PDR conversation do you want to highlight?

Reviewee Summary Comments
Reviewee comments can be recorded here.

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and enable your reviewer to access them. **Once submitted, you have completed this year's PDR form and no further changes can be made.** You can continue to update your work and development objectives throughout the year via the Objectives & PDR menu option in Employee Self-Service.

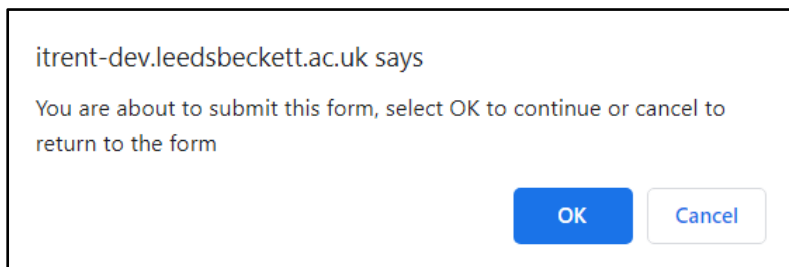
Previous Save Summary

- Once you click the Summary button, the lifecycle form will display as below.
- A green tick against the reviewee summary link confirms that this section has been completed.
- You can submit this screen now or at a later stage.
- Once you click the Submit button, as below, the lifecycle is complete.
- Once complete, no further changes can be made to any sections of the lifecycle.

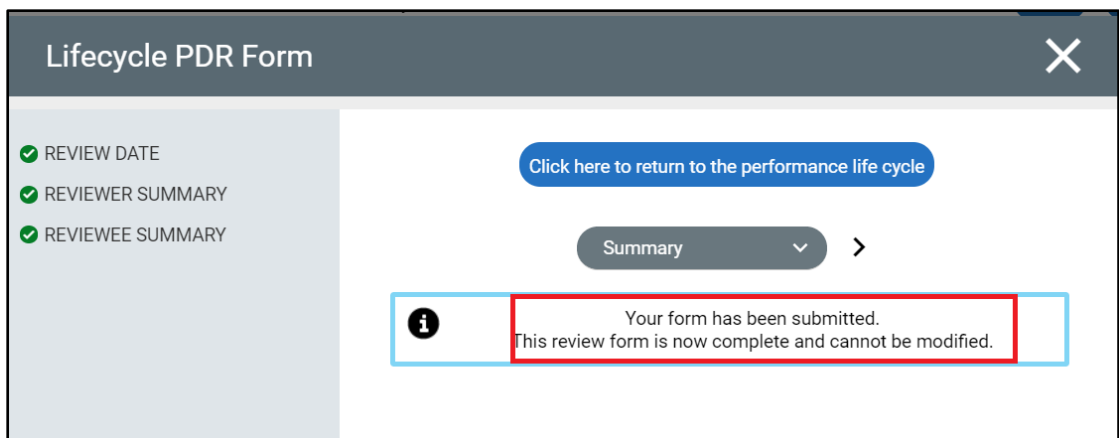


COMPLETE YOUR REVIEW LIFECYCLE (FORM)

- When you click Submit, you will be asked to confirm that you wish to submit, as below.
- Click OK to submit or Cancel to exit without submitting.



- When you submit the screen, a confirmation message displays as below.



- The review lifecycle will display the current stage as completed, as below.
- The lifecycle can now be accessed on a read-only basis.
- Once completed in iTrent, the lifecycle and form will no longer show in the default display.
- For guidance on how retrieve and access completed reviews, please see the separate guide.

Review lifecycles

PDR 2021 0.1 

Start date
1 Jan 2021

Current stage
Completed

Stage target end date

Stage owner