

Overview

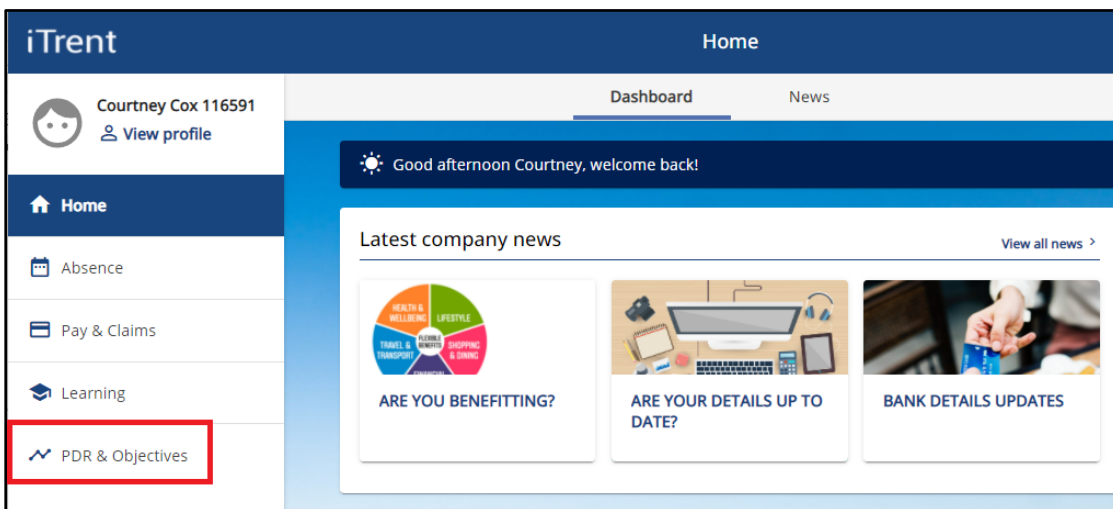
- Objectives are held separately from the PDR form in Self-Service.
- Each objective must have a title, type and start date.
- Objectives should also have a brief description and target completion date.
- They should be linked to “All” positions when created in iTrent.
- We advise that completion dates are not added until after your annual PDR discussion.
- You can update your objectives at any time.
- We advise that objectives are recorded as “cancelled” rather than deleted.
- Your manager can view, create and update your objectives, via People Manager.

This guide covers the following actions.

- Creating new objectives.
- Editing existing objectives.
- Recording objectives as “cancelled”.
- Deleting objectives.

CREATE OBJECTIVE

- 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.

The screenshot shows the iTrent Performance Objectives page for Courtney Cox (ID: 116591). The page is titled 'Performance' and has tabs for 'Reviews' and 'Objectives'. The 'Objectives' tab is active. On the left, there is a navigation menu with options: Home, Absence, Pay & Claims, Learning, and PDR & Objectives (which is highlighted). The main content area is titled 'Objectives' and includes filters for 'All', 'Current', and 'Download'. Below the filters is a table with the following data:

Form name	Start date ↓	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Implement New PDR System		30 Jun 2021		Progress
Minute Taking Skills		31 Jan 2022		Progress
Recruitment and Selection Training		30 Sep 2021		Progress
Software Licence Inventory for HRD		31 Jul 2021		Progress

At the bottom left of the main content area, there is a blue button with a plus sign and the text '+ Add objectives', which is highlighted with a red box.

- When you click on the Add Objectives button, a new window will open as below.
- Objective Title > create an appropriate name for your objective.
- Objective Type > select either Work Based or Development.
- Attachment Date - this is the start date of the objective and can be in the past.
- Description > add brief details of the objective.
- Target Completion Date > add the provisional/planned completion date for the objective.
- Completion Date > leave blank until after your annual PDR discussion.
- Position > this field defaults to "All" and should be left as "All".
- Click the Save button to save your changes.

[< Back to Objectives](#)

Objective details

Objective details: New

Objective Title (required)

Type (required)

Attachment date (required)

Description

Target completion date

Completion date

Position

[> Document attachments](#)

[Save](#)

- Once saved, the objective will display as below in the Objectives & PDR screen.

iTrent Performance

Reviews **Objectives**

Courtney Cox 116591 [View profile](#)

Home
Absence
Pay & Claims
Learning
PDR & Objectives

Objectives

[All](#) [Current](#) [Download](#)

Form name	Start date ↓	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Exam Board Training		31 Mar 2022		Progress
Implement New PDR System		30 Jun 2021		Progress

EDIT OBJECTIVE

- To edit an objective, click on the objective name to open the Objective Details window.
- Update the record and click the Save button to save your changes.

iTrent Performance

Courtney Cox 116591
View profile

Home
Absence
Pay & Claims
Learning
PDR & Objectives

Reviews Objectives

Objectives

All Current Download

Form name	Start date	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Exam Board Training		31 Mar 2022		Progress
Implement New PDR System		30 Jun 2021		Progress

< Back to Objectives

Objective details

Objective details: Develop Excel Skills

Personal objective
Yes

Objective Title (required)
Develop Advanced Excel Skills

Type (required)
Development
Work based

Attachment date (required)
01/03/2021

Description
To attend the university's Excel course to develop my skills.

Target completion date
31/08/2021

Completion date

Save Delete

RECORD OBJECTIVE AS CANCELLED

- We advise that objectives are recorded as “cancelled” rather than deleted.
- To record an objective as cancelled, click on the Progress button for the relevant objective as below.

The screenshot shows the iTrent Performance Objectives page for Courtney Cox (116591). The page is titled 'Performance' and has tabs for 'Reviews' and 'Objectives'. The 'Objectives' tab is active. On the left, there is a navigation menu with options: Home, Absence, Pay & Claims, Learning, and PDR & Objectives (which is selected). The main content area shows a list of objectives. The 'Minute Taking Skills' objective has its 'Progress' button highlighted with a red box.

Form name	Start date ↓	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Exam Board Training		31 Mar 2022		Progress
Implement New PDR System		30 Jun 2021		Progress
Minute Taking Skills		31 Jan 2022		Progress
Recruitment and Selection Training		30 Sep 2021		Progress

- This will open a new Objective Progress Details window.
- Click on the Add Objective Progress Details button, as below.

The screenshot shows the 'Objective progress details' window. It has a 'Back to Objectives' link at the top left. Below the title, there is a section for 'Objective progress list' with a dropdown menu set to 'Current'. Below this is a table with columns: Date, Status, Percentage complete, Created by, Authorisation status, and Details. At the bottom right, there is a button labeled 'Add objective progress details' which is highlighted with a red box.

- Date > add a relevant date which could be “today” or in the past.
- Status > select “cancelled”.
- Comments > record brief details of why the objective has been cancelled.
- Click the Save button to save your changes.

< Back to Objectives

Objective progress details

Back to objective progress

Objective progress details: New

Objective title
Implement New PDR System

Date (required)

15/10/2021



Status

Cancelled



Comments

This project is now on hold for 2022-23.

Save

DELETE OBJECTIVE

- We advise that objectives are recorded as “cancelled” rather than deleted.
- To delete an objective, click on the relevant objective name.

The screenshot shows the iTrent Performance interface. On the left is a navigation menu with options: Home, Absence, Pay & Claims, Learning, and PDR & Objectives (which is highlighted). The main content area is titled 'Performance' and has tabs for 'Reviews' and 'Objectives'. Under the 'Objectives' tab, there are filter buttons for 'All', 'Current', and 'Download'. Below this is a table of objectives:

Form name	Start date ↓	Target date	Linked to	Status
Develop Excel Skills		31 Aug 2021		Progress
Exam Board Training		31 Mar 2022		Progress
Implement New PDR System		30 Jun 2021		Progress
Minute Taking Skills		31 Jan 2022		Progress
Recruitment and Selection Training		30 Sep 2021		Progress

The 'Recruitment and Selection Training' row is highlighted with a red box.

- This will open the Objective Details window, as below.
- Click the Delete button to delete your objective, as below.
- Click OK to confirm deletion of the objective or Cancel to cancel the deletion, as below.

[← Back to Objectives](#)


Objective details

Objective details: Recruitment and Selection Training


Personal objective
Yes

Objective Title (required)

Type (required)

Attachment date (required)
 

Description

Target completion date
 

Completion date

itrent-dev.leedsbeckett.ac.uk says

The details will be deleted. Continue?