



University of Essex

iTrent User Guide

Reviews - HR Organiser

 iTrent

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Introduction

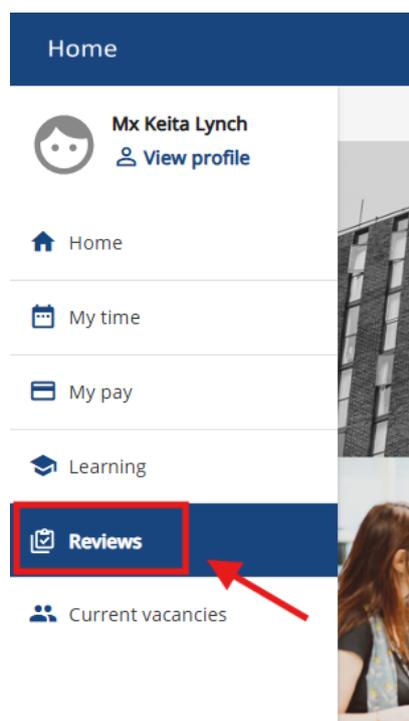
The **Reviews** module within HR Organiser allows staff to record and track annual **Personal Development Reviews (PDRs)** and their associated **objectives**.

How to access the Reviews module

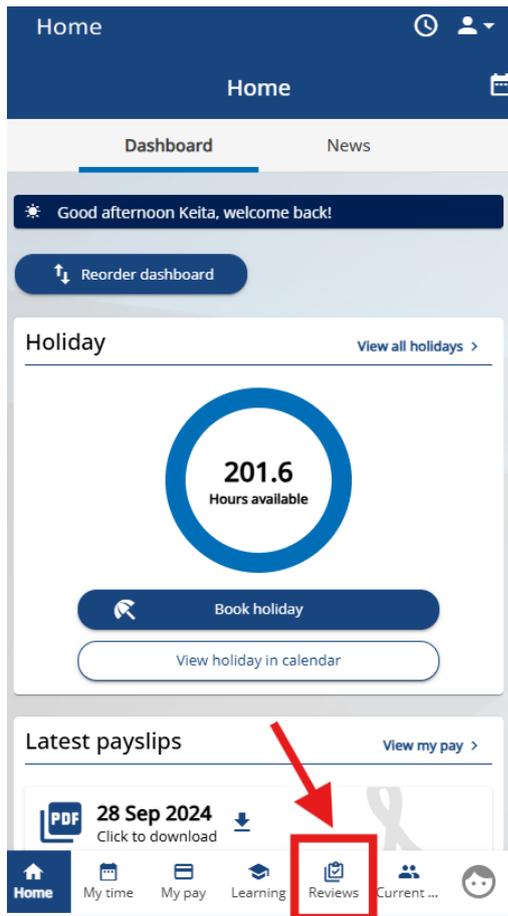
To access the Reviews module in HR Organiser:

1. Log in to [HR Organiser](#). If you have trouble logging in, please refer to the following guide: [HR Organiser | How to log in](#)
2. From the navigation menu, select **Reviews**.

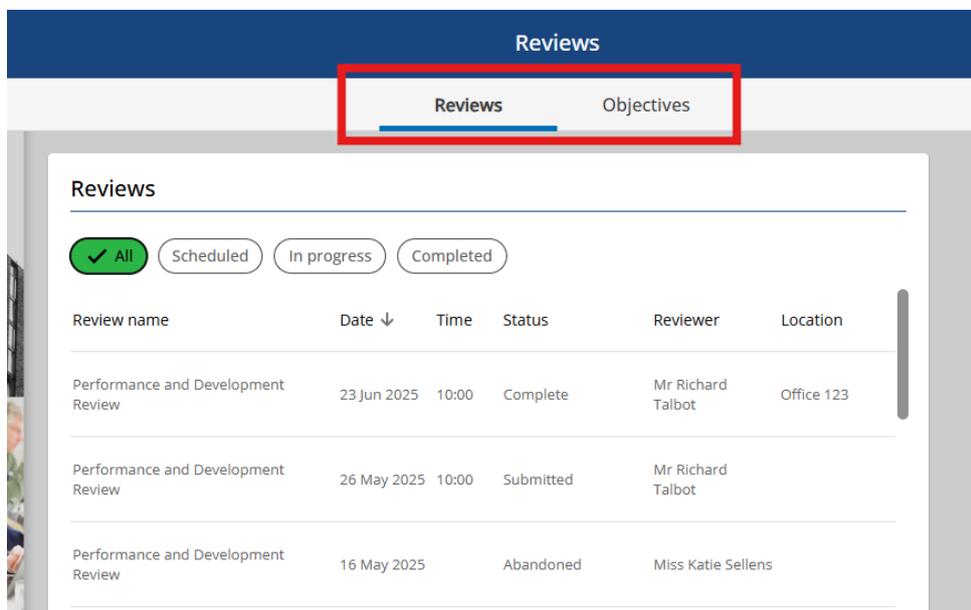
The navigation menu is on the left-hand side of the screen on a PC:



and along the bottom on mobile:



3. You can now toggle between **Reviews** and **Objectives** using the tabs at the top:

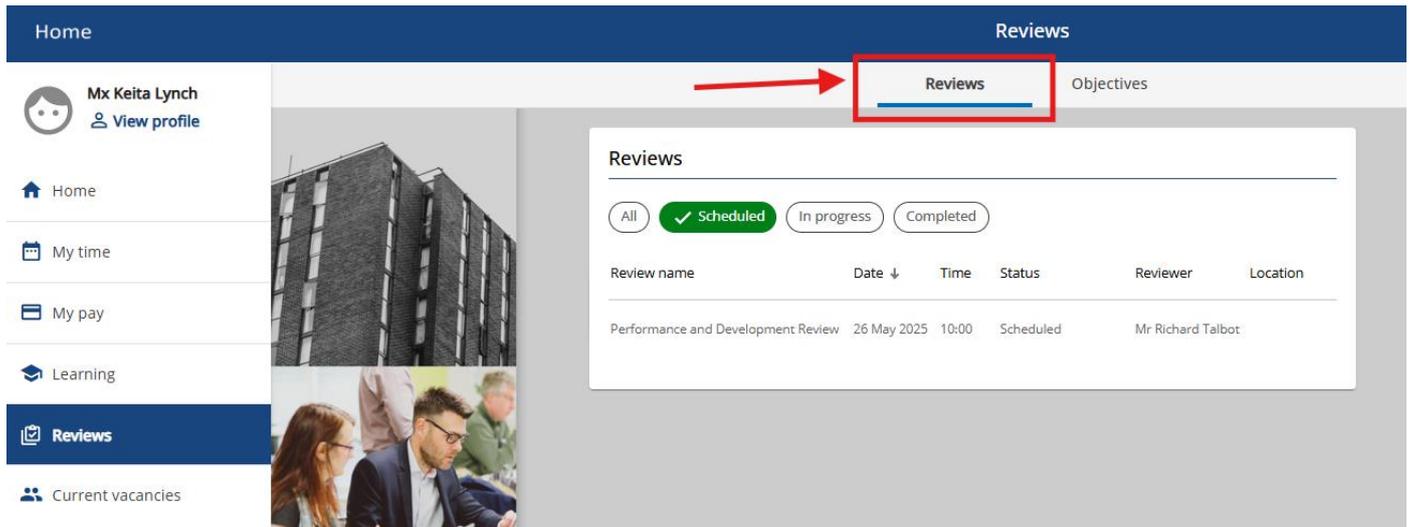


Reviews tab – PDR forms

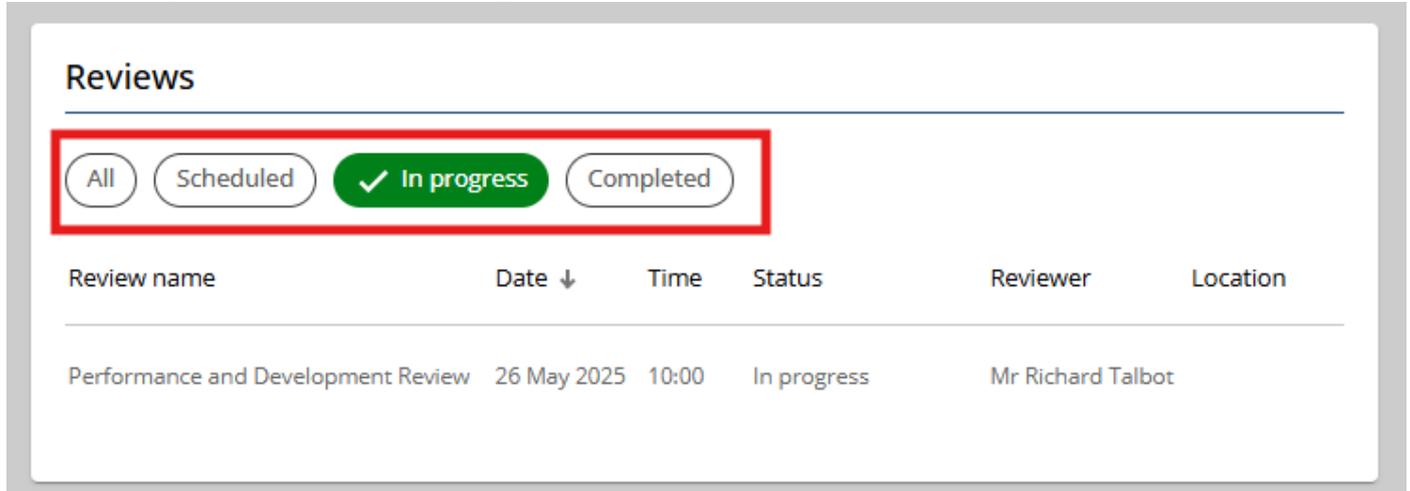
Note: The PDR form and its contents can be viewed by both you and your reviewer.

The Reviews tab is where you can access your PDR forms.

Ensure you have clicked **Reviews** from the navigation menu, then click the **Reviews tab** along the top of the screen:



You will be presented with a list of your PDRs. Use the filters to search for the relevant PDR form:



Search filters:

All

All your PDRs, current and historical.

Scheduled

Your PDRs which have the associated meeting scheduled.

In progress

Your PDRs which have the associated meeting scheduled, and either you or your Reviewer have

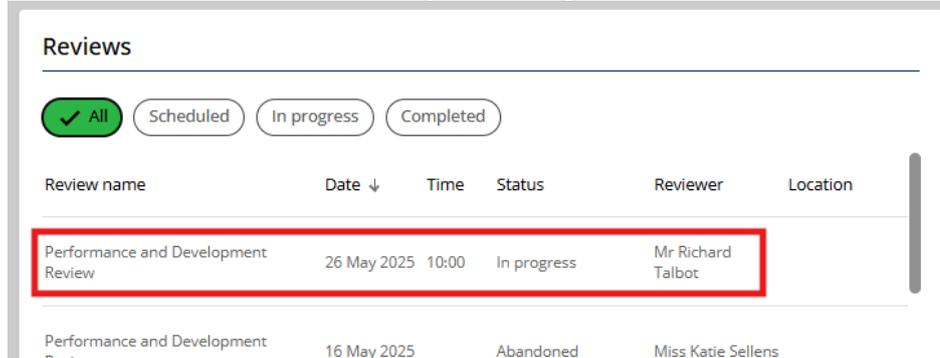
begun to edit the PDR form.

Completed

PDRs where the associated meeting has taken place, and the PDR form is no longer editable.

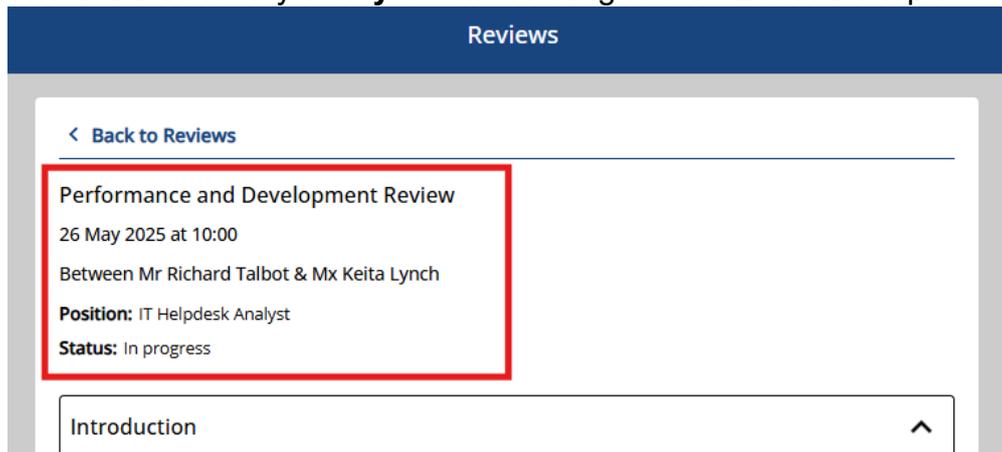
The results list will show you the **date, time** and **location** of the PDR meeting, the PDR form **status**, and who your **Reviewer** is. You can click on any review in the list to view the PDR form.

View the **PDR form details** by selecting a PDR from the filterable list:



Review name	Date ↓	Time	Status	Reviewer	Location
Performance and Development Review	26 May 2025	10:00	In progress	Mr Richard Talbot	
Performance and Development Review	16 May 2025		Abandoned	Miss Katie Sellens	

There is a summary of **key details** relating to the PDR at the top of the form:



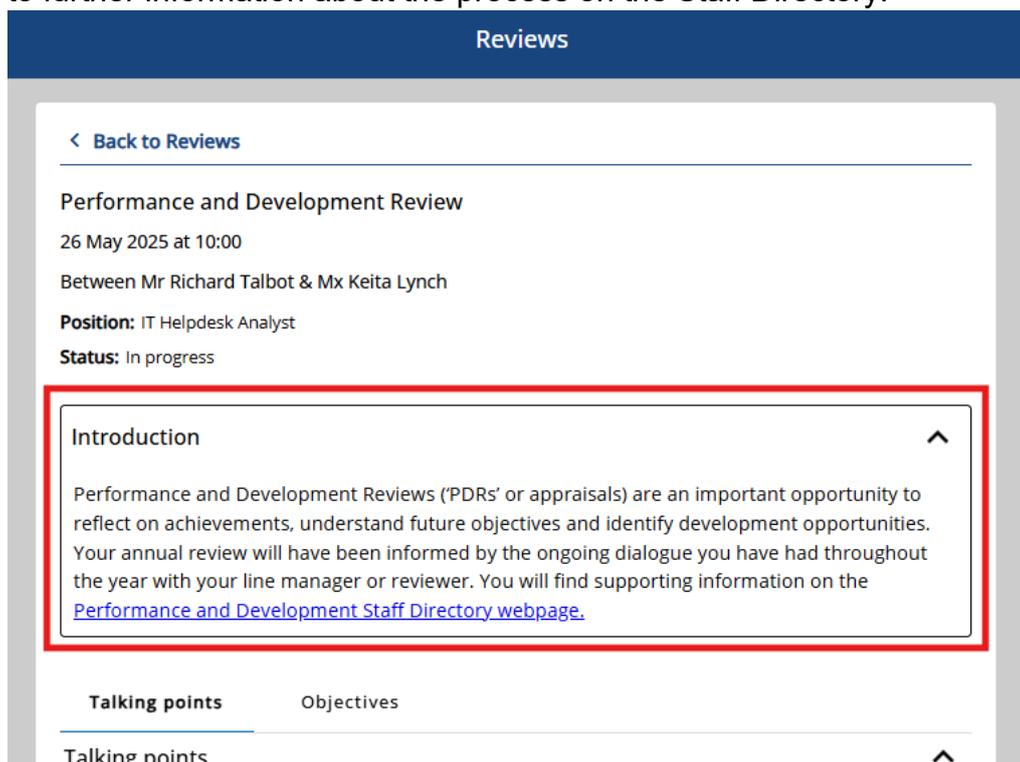
Reviews

[← Back to Reviews](#)

Performance and Development Review
26 May 2025 at 10:00
Between Mr Richard Talbot & Mx Keita Lynch
Position: IT Helpdesk Analyst
Status: In progress

Introduction [↑](#)

Under the key details, an **Introduction** box explains the purpose of your PDR, and contains a link to further information about the process on the Staff Directory:

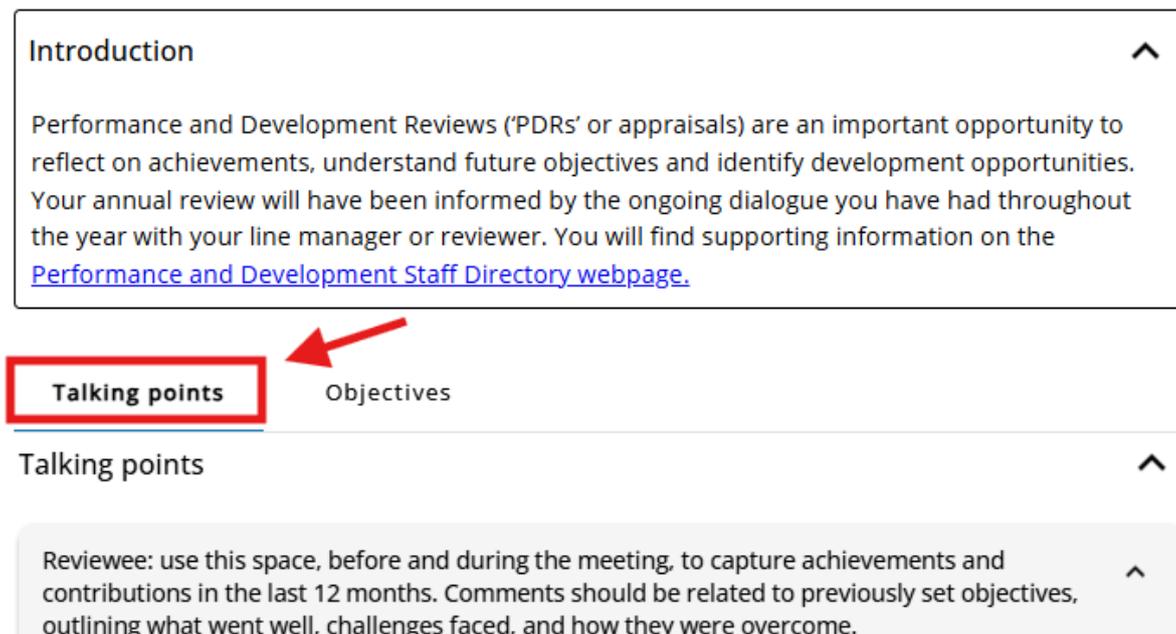


The screenshot shows a 'Reviews' page with a blue header. Below the header, there is a 'Back to Reviews' link. The main content area is titled 'Performance and Development Review' and includes details such as the date '26 May 2025 at 10:00', the participants 'Between Mr Richard Talbot & Mx Keita Lynch', the position 'IT Helpdesk Analyst', and the status 'In progress'. A red rectangular box highlights the 'Introduction' section, which contains text explaining the purpose of PDRs and a link to the 'Performance and Development Staff Directory webpage'. Below the introduction, there are two tabs: 'Talking points' (which is selected) and 'Objectives'. The 'Talking points' section is currently empty.

Talking Points

The **Talking points** section of your PDR form is where you and your reviewer can record your reflection upon the past year; along with your training requirements and career aspirations.

To access the Talking points, select the **Talking points** tab, under the **Introduction** box:



This screenshot shows the 'Introduction' box at the top, which is identical to the one in the previous image. Below it, the 'Talking points' tab is highlighted with a red rectangular box, and a red arrow points from this box to the 'Talking points' tab. The 'Objectives' tab is also visible. Below the tabs, the 'Talking points' section is active, showing a greyed-out instruction: 'Reviewee: use this space, before and during the meeting, to capture achievements and contributions in the last 12 months. Comments should be related to previously set objectives, outlining what went well, challenges faced, and how they were overcome.'

You will be presented with a list of questions; some of which you can provide a response to.

Points that you are required to answer use the prefix, **Reviewee**. Those intended for your reviewer use the prefix, **Reviewer**:

Talking points Objectives

Talking points ^

Reviewee: use this space, before and during the meeting, to capture achievements and contributions in the last 12 months. Comments should be related to previously set objectives, outlining what went well, challenges faced, and how they were overcome. ^

 Mx Keita Lynch wrote: 30/05/2025 at 12:59

Example response

Reviewer: use this space, before and during the meeting, to capture achievements and contributions in the last 12 months. Comments should be related to previously set objectives, outlining what went well, challenges faced, and how they were overcome.

Reviewee: once objectives have been identified, please outline any training or development that will support these. These could include formal learning, informal support or job shadowing etc.

Add response here

You should complete as much of the Talking points as you can before your PDR meeting, as these points will inform the discussion, and your objectives for the next year.

To **add a response** to a **Talking point**, click in the **Add response here** box, and type your answer:

Reviewer: use this space, before and during the meeting, to capture achievements and contributions in the last 12 months. Comments should be related to previously set objectives, outlining what went well, challenges faced, and how they were overcome.

Reviewee: once objectives have been identified, please outline any training or development that will support these. These could include formal learning, informal support or job shadowing etc.

Add response here



You can save at any point by selecting either the **green save icon** in the bottom right-hand corner:

Reviewee: use the box below to outline any training or development that will support your wider career aspirations. These could include formal learning, informal support or job shadowing etc.

Add response here

A red arrow points from the top right of the form to a green square icon with a white floppy disk symbol, which is highlighted with a red border.

Or by selecting **Save** at the bottom of the screen:

Reviewee: To complete after the meeting. Please confirm you agree to the content of this form being an accurate reflection of the PDR conversation.

Yes

Save Cancel

A red arrow points from the left side of the form to a green rounded rectangular button with the word "Save" in white text, which is highlighted with a red border.

The Talking points can be edited at any point until the form is submitted and completed by your reviewer. Before your reviewer submits the form, they should ask you to respond to the final question; confirming you agree to the contents being an accurate reflection of the PDR conversation.

Objectives

The **Objectives** section of the PDR form allows you to search, view and create objectives, which contribute to your professional development.

Select the **Objectives** tab from under the **Introduction** box:

[< Back to Reviews](#)

Performance and Development Review
26 May 2025 at 10:00
Between Mr Richard Talbot & Mx Keita Lynch
Position: IT Helpdesk Analyst
Status: In progress

Introduction ^

Performance and Development Reviews ('PDRs' or appraisals) are an important opportunity to reflect on achievements, understand future objectives and identify development opportunities. Your annual review will have been informed by the ongoing dialogue you have had throughout the year with your line manager or reviewer. You will find supporting information on the [Performance and Development Staff Directory webpage](#).

Talking points **Objectives**

A red arrow points from the right side of the page to the "Objectives" tab, which is highlighted with a red border.

Create an objective

Under the Objectives section of the PDR form, select **+ Add objective**:

Talking points **Objectives**

 **+ Add objective**

Start date (dd/mm/yyyy)  13/06/2024 End date (dd/mm/yyyy)  13/06/2025 Filter by objective status
In progress ▼

Clear search Search

You will be presented with a form with various fields to complete in order to create your objective. Mandatory fields are marked with an asterisk *:

Reviews

[< Back to review details](#)

Objective details

* Objective (required)

* Type (required)
Please choose ▼

* Objective creation date (dd/mm/yyyy) (required)
22/09/2025 

Description

Position
<All Jobs> × ▼

Target completion date (dd/mm/yyyy)
 

* Start date (dd/mm/yyyy) (required)
 

Actual completion date (dd/mm/yyyy)
 

Save Cancel

*** Objective (required)**

The title or name of your objective

*** Type (required)**

Select the dropdown and choose 'Personal (please select)

*** Objective creation date (dd/mm/yyyy) (required)**

The date the objective was created. This will default to the current date, however if you need to amend this, select the calendar symbol, then select an alternative date.

Description

Describe what the objective entails; e.g. the actions that need to be completed in order to achieve the objective, and why this objective is being set.

Position

Select the dropdown, then choose which position the objective relates to.

Target completion date (dd/mm/yyyy)

Date you aim to complete the objective.

*** Start date (dd/mm/yyyy) (required)**

When you will start working on the objective.

Actual completion date (dd/mm/yyyy)

Date you completed the objective. You can come back at a later date and add this once the objective has been achieved.

Once you have completed the necessary fields, select **Save** at the bottom of the screen:



Search for and edit an objective

On the **Objectives** section of the PDR Form, there is a filterable list of all your set objectives. Use the **date** and **status** filters to find specific objectives:

Talking points Objectives

[+ Add objective](#)

Start date (dd/mm/yyyy)  30/05/2024 End date (dd/mm/yyyy)  30/05/2025 Filter by objective status
In progress ▼

[Clear search](#) [Search](#)

Sort: Newest - oldest ▼

Complete Health and Safety training
Start date - 06/02/2025

● In progress

The list of results will show a summary of the objective, including **title of objective**, **start date**, **completion date**, and **status** (in progress or completed):

Sort: Newest - oldest ▼

Complete Excel training
Start date - 06/02/2025 Completion date - 25/02/2025

● Completed

Complete Health and Safety training
Start date - 06/02/2025

● In progress

Select an objective from the list to view and edit its details:

[< Back to review details](#)

Objective details

Personal objective: Yes

*** Objective (required)**

Complete Excel training

*** Type (required)**

Personal (please select)

*** Objective creation date (dd/mm/yyyy) (required)**

06/02/2025 

Description

Complete Excel training available to book via HR Organiser, to help develop spreadsheet skills.

Position

IT Helpdesk Analyst (Digital Innovation and Technology Services - IT Cust... 

A common edit you may make is adding a completion date, once you have completed the objective.

To do this, scroll down to **Actual completion date** and select the **calendar icon**:

*** Start date (dd/mm/yyyy) (required)**

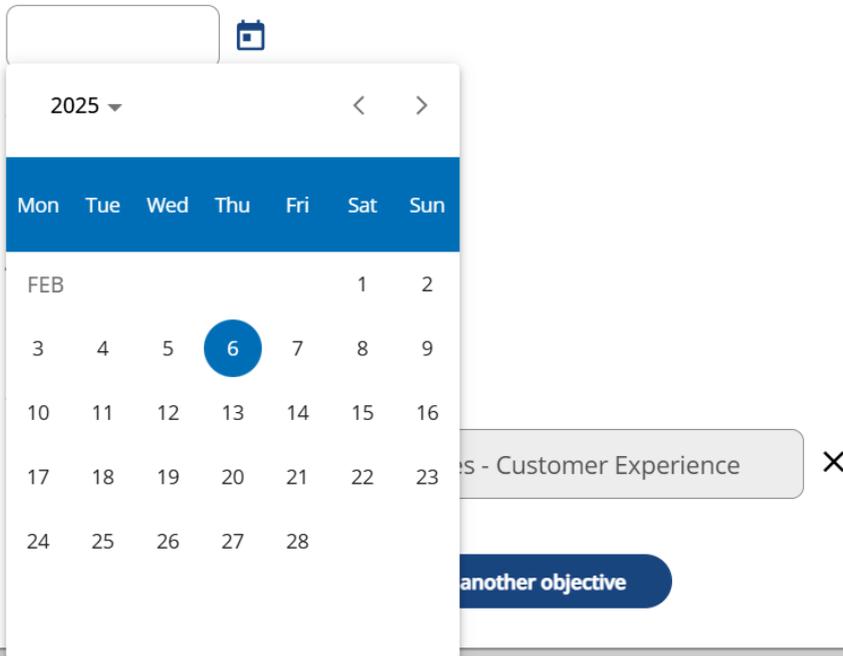
06/02/2025 

Actual completion date (dd/mm/yyyy)

From the calendar widget, click on the **date** that you completed the objective:

Target completion date (dd/mm/yyyy)



The image shows a calendar widget for the year 2025. The date 13/06/2025 is selected and highlighted with a blue circle. The widget is part of a form with a text input field containing '13/06/2025' and a calendar icon. Below the calendar, there are two buttons: 'Cancel' and '+ Add another objective'. The calendar is currently displaying the month of February.

The selected date will now populate the **Actual completion date** field:

Actual completion date (dd/mm/yyyy)



The image shows a form field with the date '13/06/2025' entered. To the right of the text is a circular calendar icon.

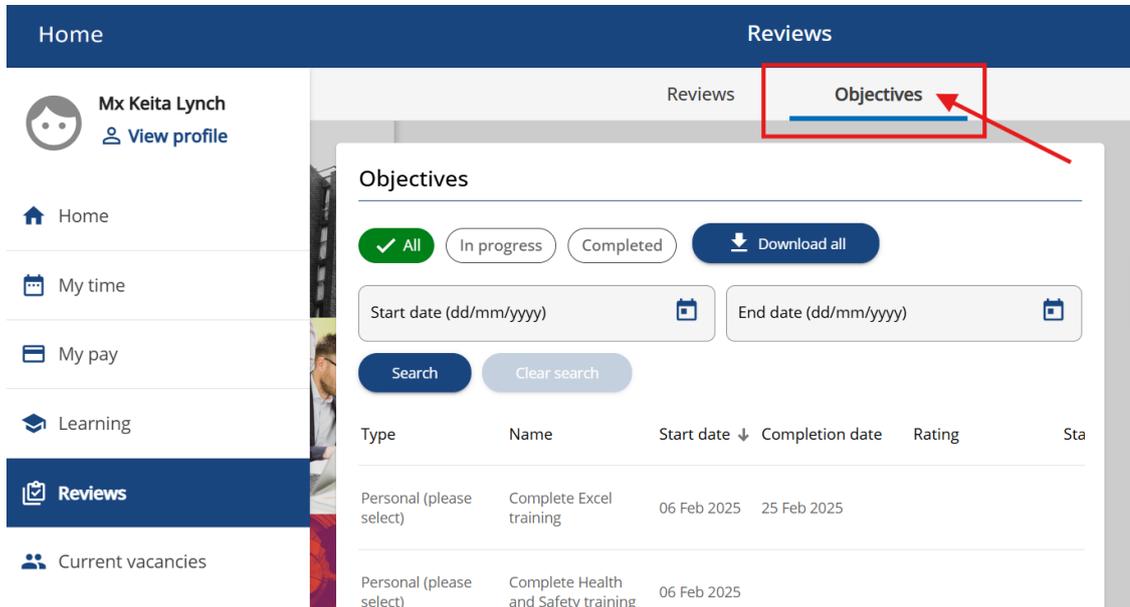
To save any changes that you make, select **Save** at the bottom of the screen:



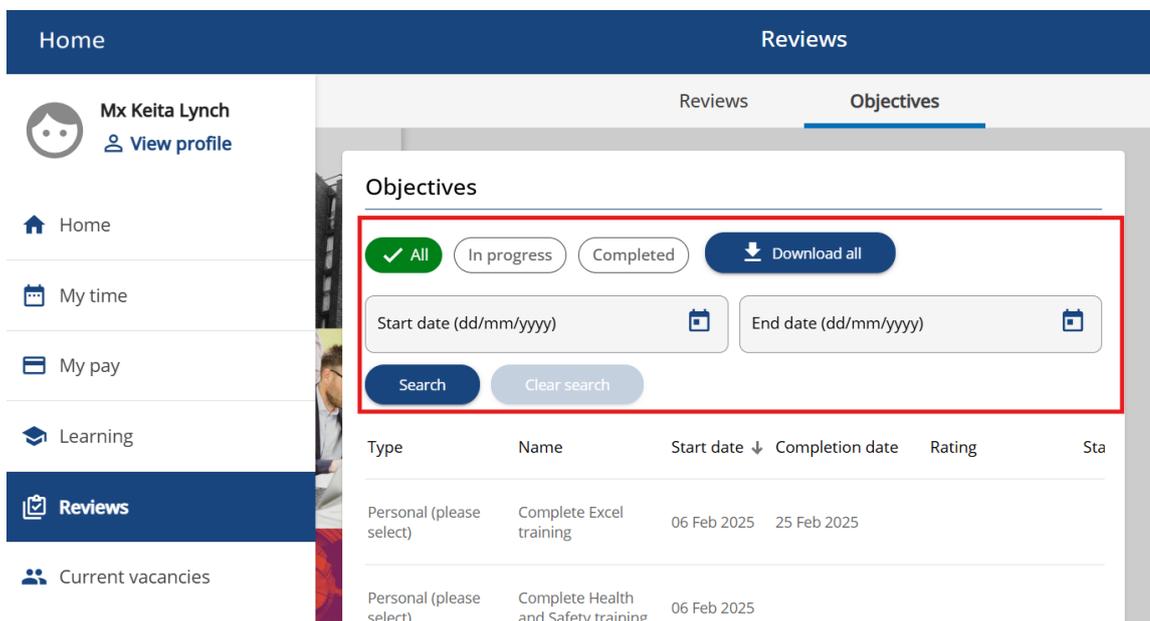
The image shows three buttons at the bottom of the screen: a green 'Save' button, a grey 'Cancel' button, and a blue '+ Add another objective' button. The 'Save' button is highlighted with a red border.

Objectives tab

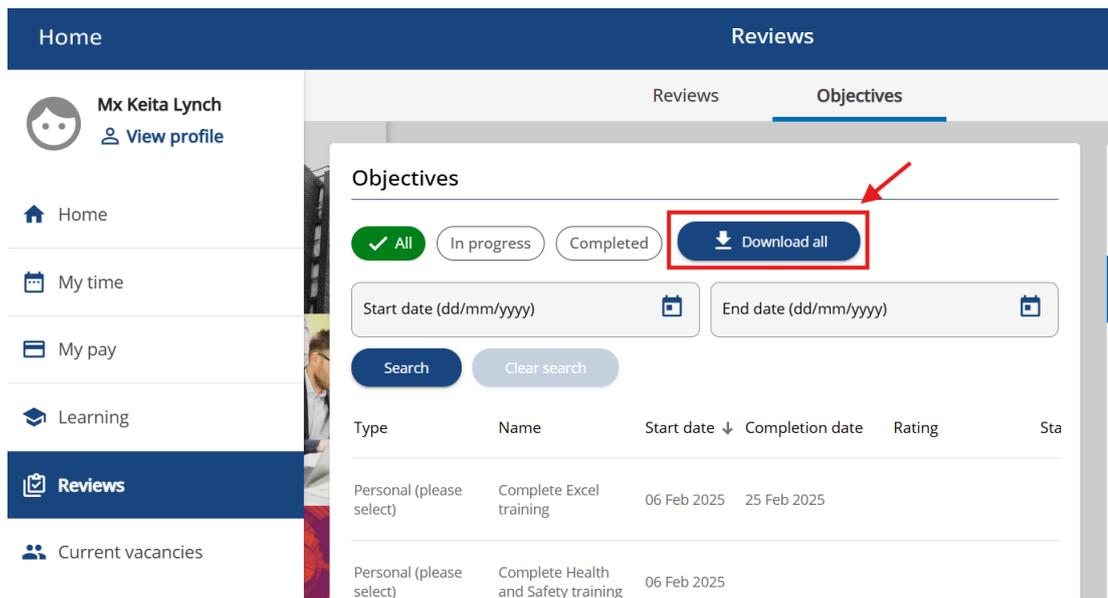
In addition to accessing your objectives via a PDR form, you can also access them at any time using the **Objectives tab** in the **Reviews** section of HR Organiser:



Use the date and status filters to find specific Objectives:



You can also download all your objectives as a PDF by selecting **Download all**. Note, this can take some time:



Selecting an objective from the list provides you with the same details screen you would access via the PDR forms, where you can view and edit the **objective details**:

