iTrent User Guide

Reviews – People Manager

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Contents

Introduction

A PDR is between a **Reviewer** (an employee's manager by default), and a **Reviewee** (the Manager's reportee). The **Reviews** module within People Manager allows a Reviewer to schedule, record and track annual PDRs and their Reviewee's associated **Objectives**.

The PDR Cycle

The PDR cycle starts on the 1ˢᵗ August each year, which generates a PDR form for a Reviewee within the PDR system. Reviewers will be prompted to schedule a PDR meeting between themselves and their Reviewee.

Once the PDR meeting is scheduled, the Reviewer and Reviewee will then complete a **Talking Points** section within the PDR form; reflecting on the past PDR year.

During and after the PDR meeting, The **Reviewer** should set the Reviewee **Objectives** for the next PDR year.

Once both the Reviewer and Reviewee are happy that the PDR form is an accurate reflection of the PDR meeting, both parties **sign off** the PDR form using the relevant Talking Point questions.

The Reviewer then **Submits** and **Completes** the PDR form.

The Reviewee should update their progress on their Objectives **throughout the year** by accessing the Reviews module in HR Organiser. Managers are encouraged to discuss their reportee's progress on these Objectives during their regular one-to-one meetings. Reportee's Objectives can be accessed via their record in People Manager, under **Development**.
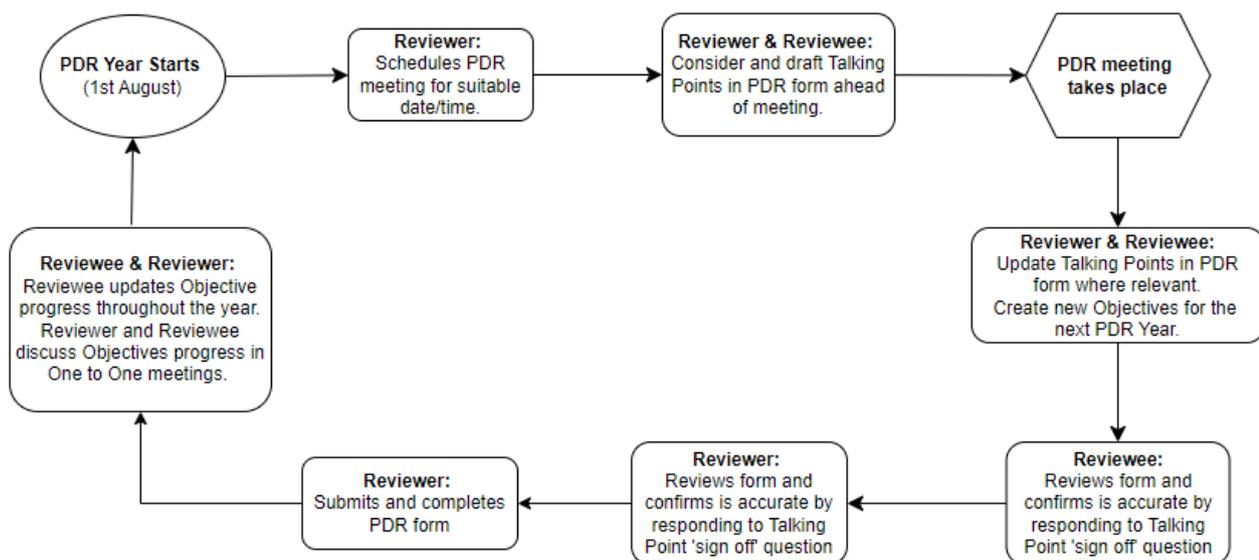
Access the Reviews module
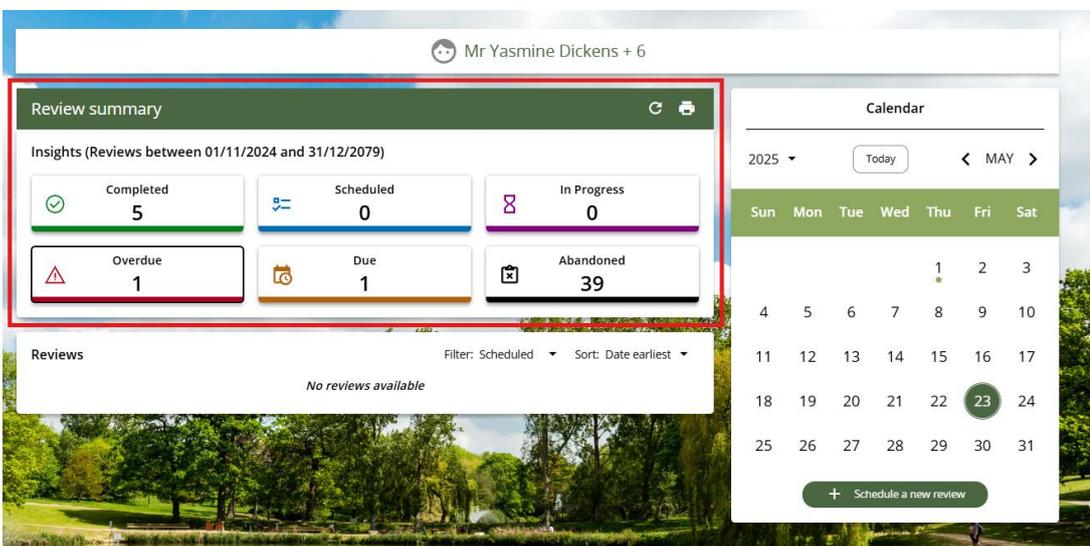
To access the Reviews module in People Manager:
1. Log in to iTrent
2. Select **People Manager**
3. Once logged in, select **Reviews** from the home page:
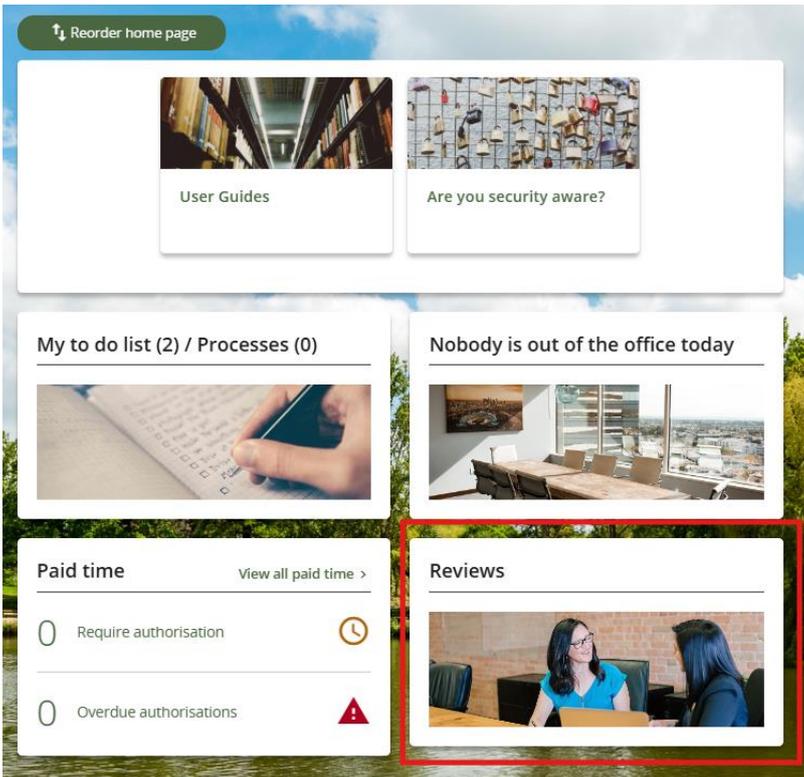
Review summary

Once you have logged in to People Manager and selected **Reviews**, you will arrive at the **Review Summary** screen. This comprises the **Insights**, **Reviews search** and **Calendar** blocks.
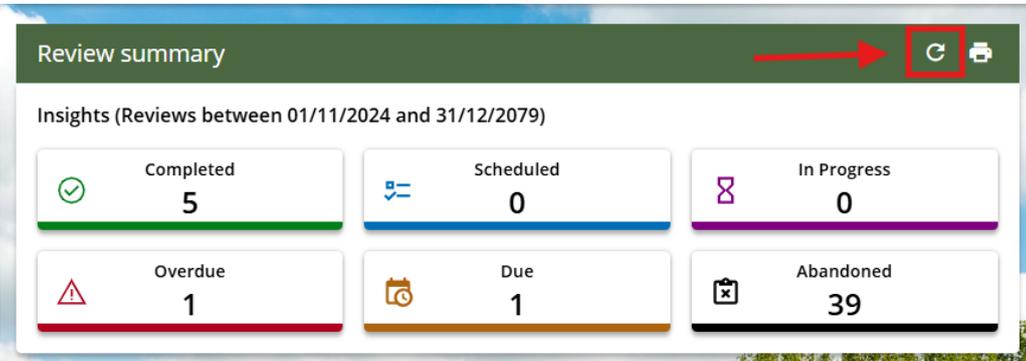
Insights

The **Insights** block gives you an overview of the statuses of all your reviewees' PDRs.

> **N:** PDRs with status **Submitted** cannot be selected from the **Insights**. To view PDRs with status **Submitted**, please use the **Reviews search**.
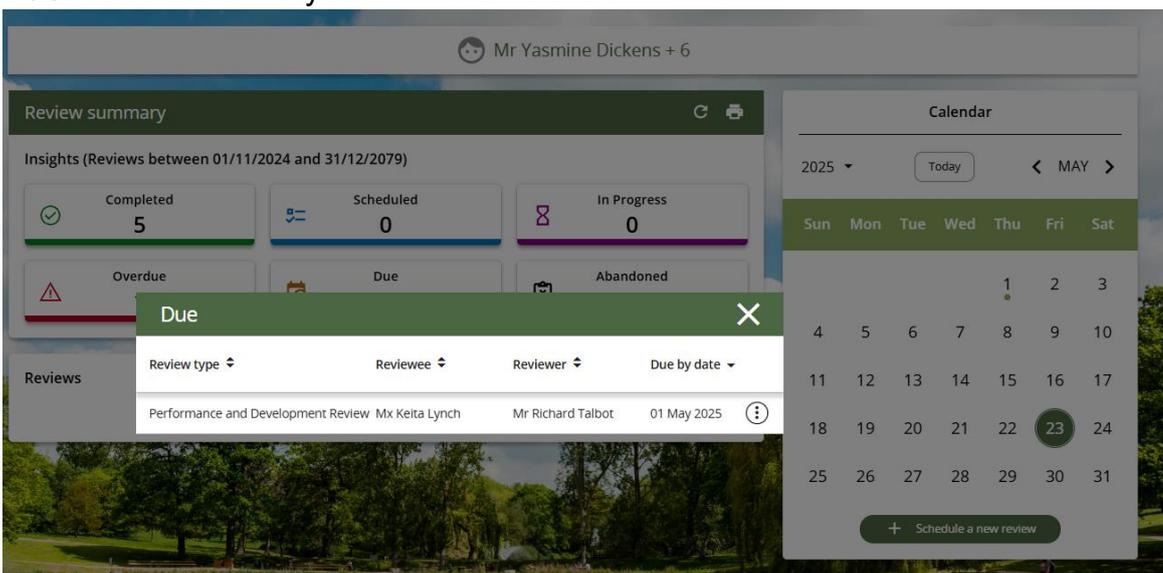
To refresh the view of the **Insights**, click the refresh icon in the top right of the block:


Click the print icon in the top right of the block to print the Insights block:
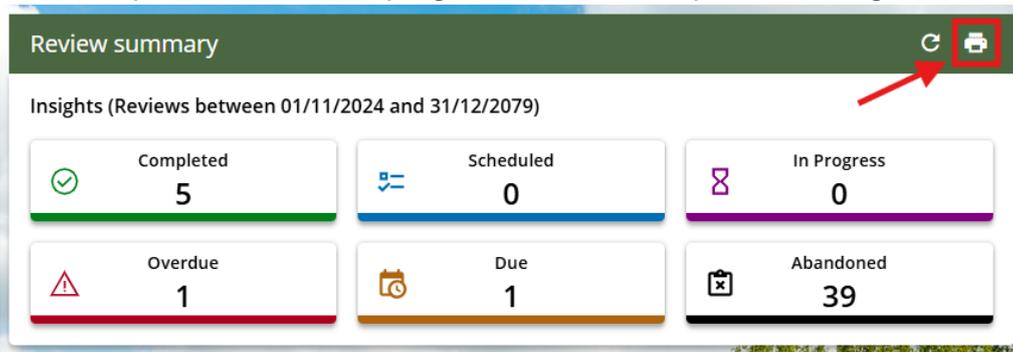
Click any of the statuses to view a list of the PDRs with that same status, for example clicking the **Due** status will show you which PDRs are due:

If you wish to view further details about when the PDR is scheduled for, or to schedule the PDR meeting, select the three vertical dots, then **Schedule review details**:
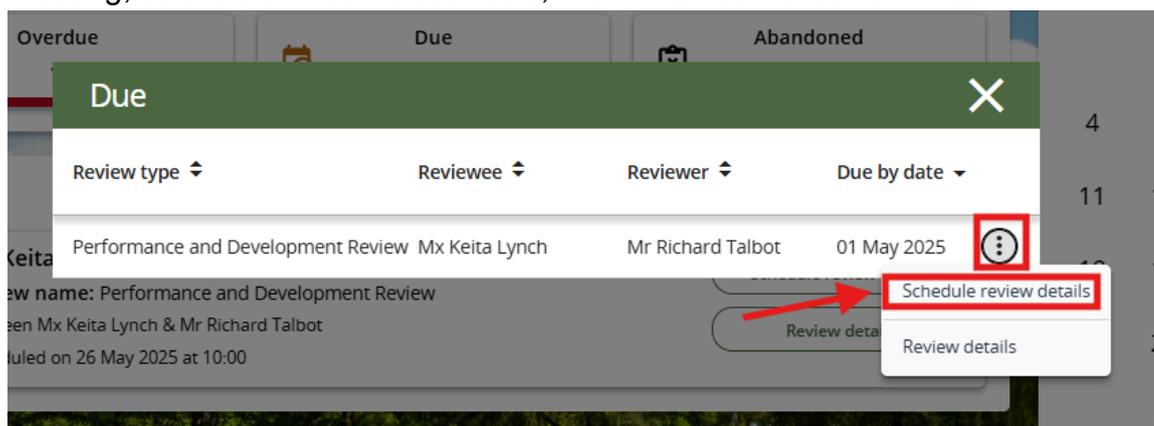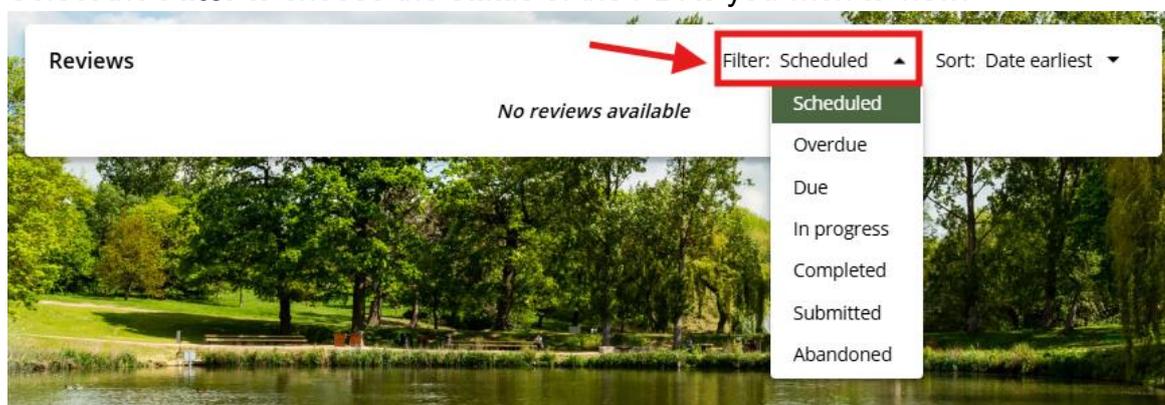

If you wish to view the details of the PDR, such as the **Talking points**, **Objectives** or **Talent profile summary**, select the three vertical dots, then **Review details**:
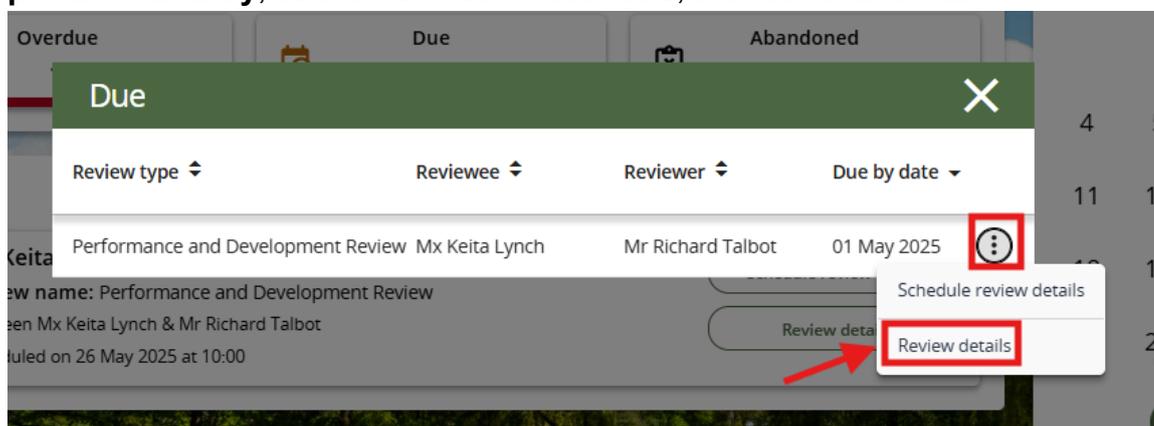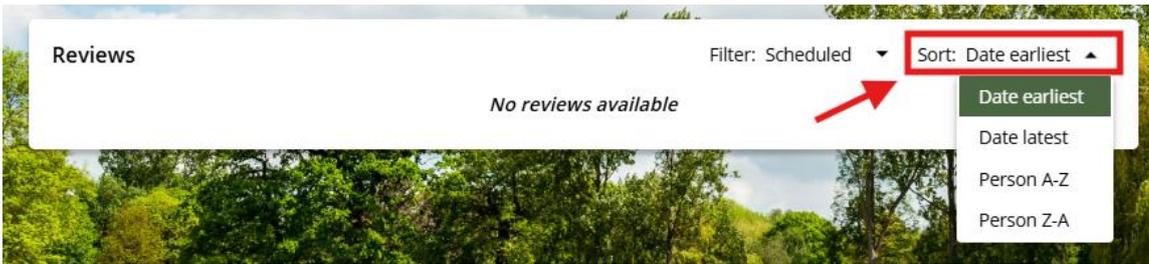

Reviews search

The **Reviews search** allows you to filter and sort all your reviewees' PDRs.

Select the **Filter** to choose the status of the PDRs you wish to view:


Select **Sort** to choose the order in which you wish to display the list of PDRs:

The PDRs that appear in the search results will include a summary, including the scheduled date of the PDR meeting, where it took place, and when the PDR was completed:
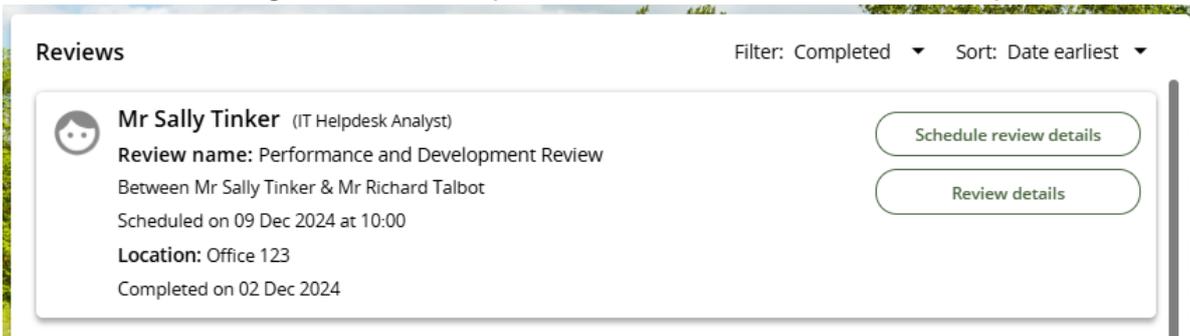
If you wish to view further details about when the PDR is scheduled for, or to schedule the PDR meeting, select **Schedule review details**:
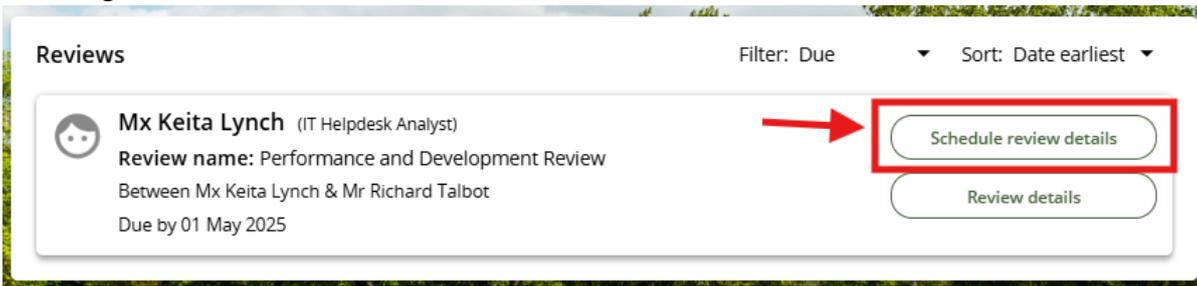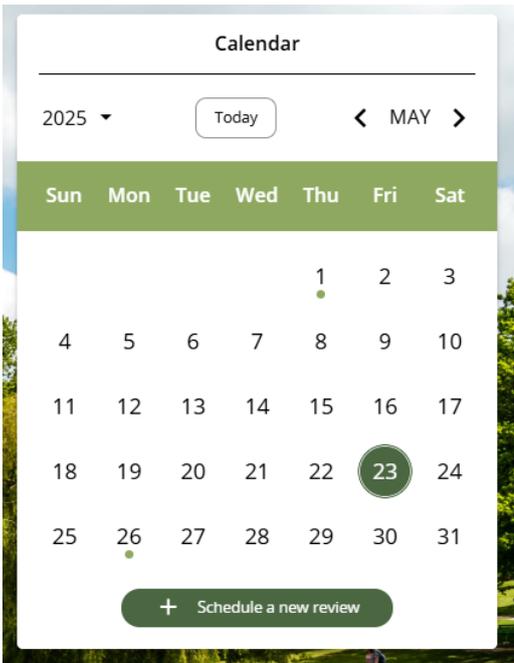

If you wish to view the details of the PDR, such as the **Talking points**, **Objectives** or **Talent profile summary**, select **Review details**:
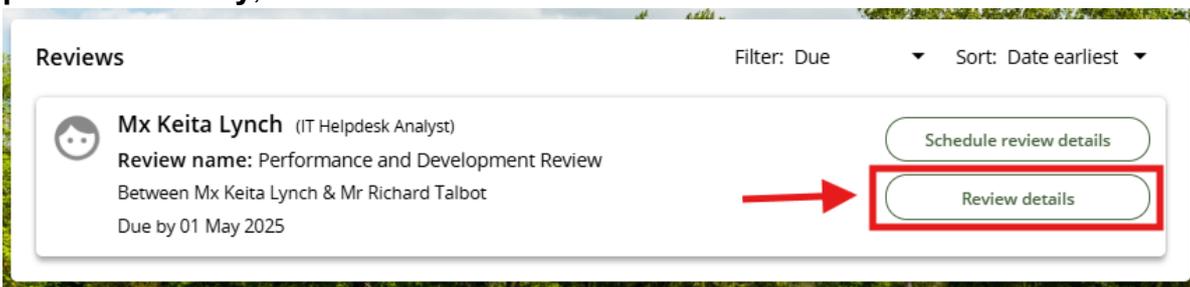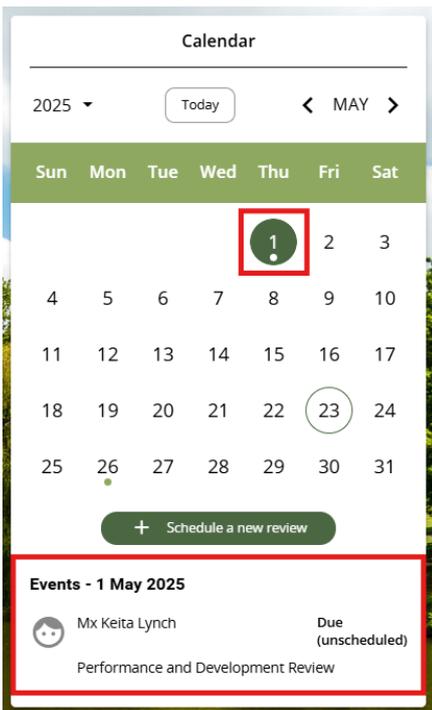

Calendar

The **Calendar** shows a green dot for when reviewees' PDRs are due:

Selecting a date where a PDR is due will display whose PDR is due on that date, and whether it has been scheduled:
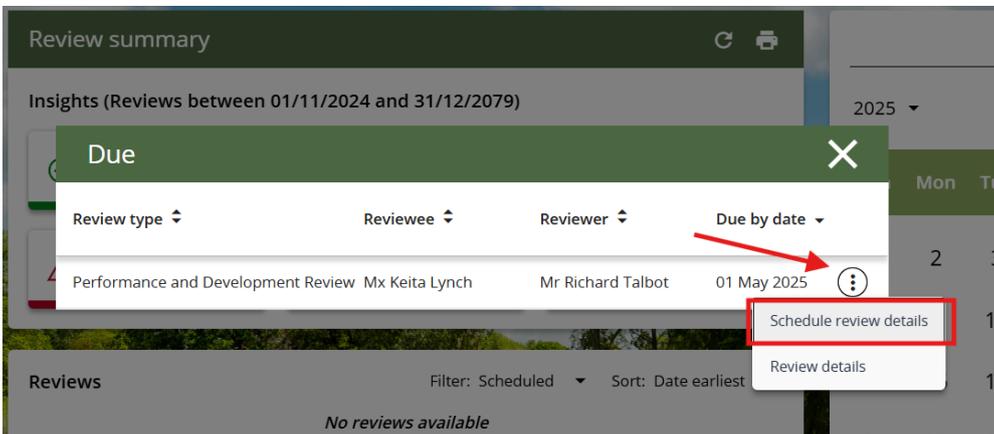

Scheduling a review

Once a review is due, you can schedule the PDR meeting for a specific date, time and location. In the Reviews module of People Manager, select **Due** from the **Review summary – Insights** block:
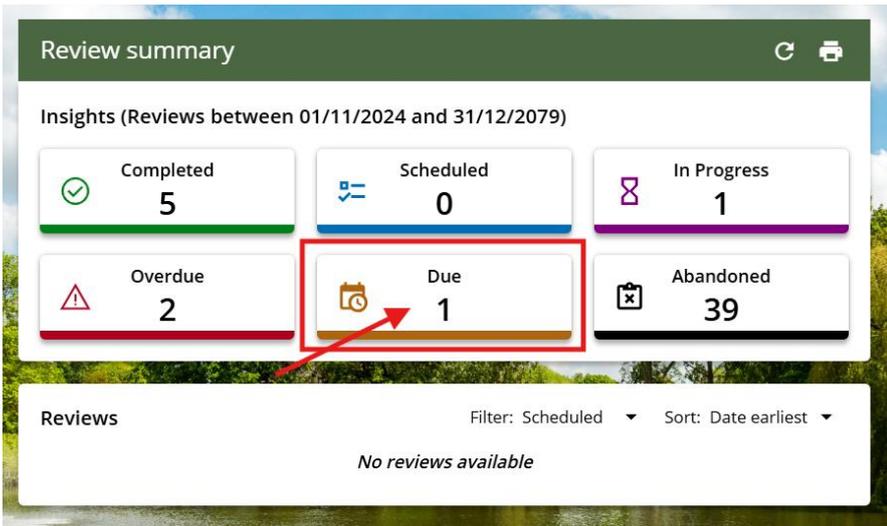
A list of any PDRs that are due will be displayed.
On the desired PDR, select the **three vertical buttons** > **Schedule review details**:

Complete the **Scheduled date**, **Scheduled start time**, **Scheduled end time** and **Location** fields.
Note, these are not mandatory – however it is recommended to include as much detail as possible:

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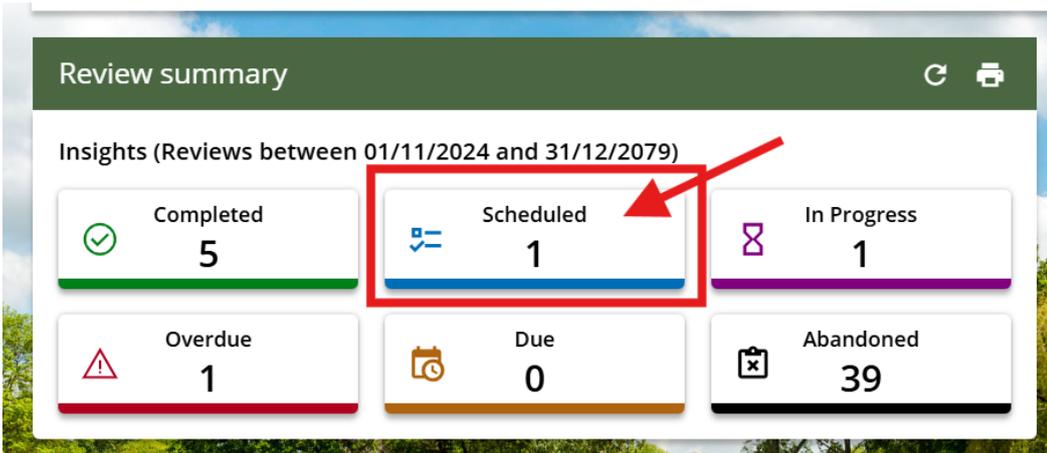

An email notification, asking the Reviewee to complete the **Talking Points** on the PDR form will now be sent to the reviewee.

The PDR's status is now **Scheduled**. It will now show under **Scheduled** from the **Insights** block, on the **Review summary** screen:

Talking points

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

Editing the talking points

To view the Talking points, open a desired PDR form, then select **Talking points** under the **Narrative** box:

Once you have selected the Talking points section of the PDR form, you will be presented with a list of questions; some of which you can provide a response to and others, your **Reviewee** will respond to.

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

The final Talking points allow you and the Reviewee to give final **sign off** on the form, before it is submitted and completed:

You can save your progress at any point by selecting the green save symbol in the bottom right:

Or select **Save** at the bottom of the screen:

When you first save responses to the Talking points, your reviewee with be notified by email, prompting them to log in to HR Organiser and to read the updated form.

Objectives

During the PDR with the reviewee, objectives should be set for the for the coming year. These objectives should contribute to the reviewee's professional development.

To access a reviewee's objectives, navigate to the Objectives section within their PDR form:

Adding an objective

To add a new objective, select the **+ Add Objective** button:

You will be presented with a form with various fields to complete in order to create the reviewee's objective:

Mandatory fields are marked with an asterisk *:

Objective title*
The title or name of the objective

Type*
Select the dropdown and choose 'Personal (please select)

Attachment date (dd/mm/yyyy)*
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.

Target completion date (dd/mm/yyyy)
Date you would like the reviewee to complete the objective by.

Start date (dd/mm/yyyy)*
When the reviewee will start working on the objective.

Completion date (dd/mm/yyyy)
Date the reviewee has completed the objective. The reviewee can add this at a later date via HR Organiser, once the objective has been achieved.

Position
Select the dropdown, then choose which of the reviewee's positions the objective relates to.

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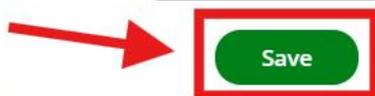

Searching for objectives

In the Objectives section of the PDR form, you can search for specific objectives belonging to the reviewee.

Use the date and type filters to narrow down your search results. Dates relate to the **start date** of the objective, and type relates to the **status** of the objective (**Completed**, **Overdue**, **Not started** or **In progress**):
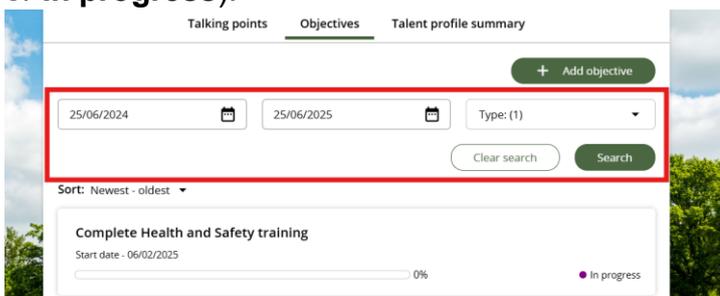
Use the **Sort** option to order the search results alphabetically (using the objective title), or by start date:
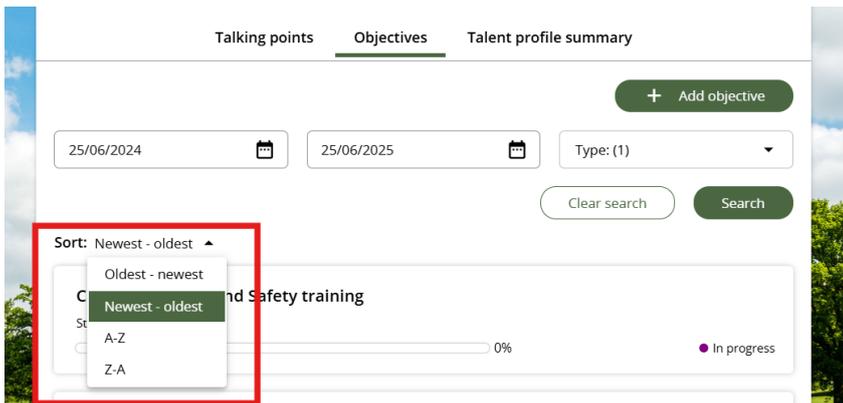
Selecting a specific objective will take you to the **Objective details** screen to view and edit the related information:
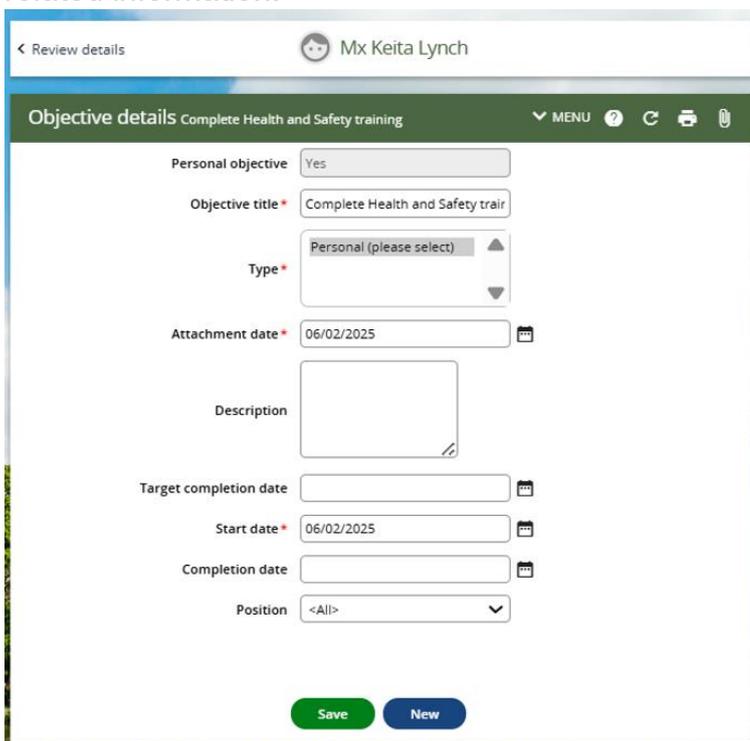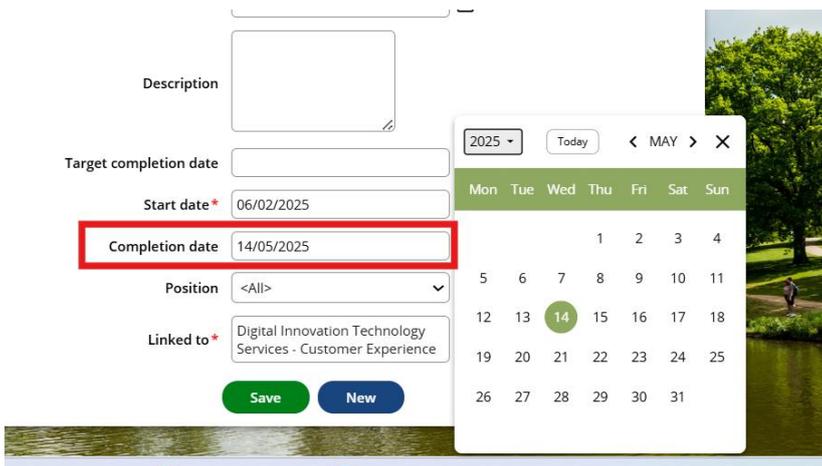

Completing an objective

Your reviewee will usually mark their objectives as completed using HR Organiser. It is possible however to action this as reviewer.

From the Objectives section of the PDR form, search for and select the relevant objective.

Once you are on the **Objective details** screen, select the calendar symbol next to the **Completion date** field and select the date your reviewee completed the objective:

Once a completion date has been entered, select Save at the bottom of the screen:


The objective has now been set as **Completed**. When searching for this objective going forward, you will find it categorised as the type, **Completed**.

Viewing objectives on reportee's record

Progress of objectives can be reviewed periodically during manager/reportee one-to-one meetings.

To support this, a reportee's objectives can also be accessed in People Manager via their employee record.

Navigate to the reportee's record, then under **Links**, select **Development** > **Objectives**:
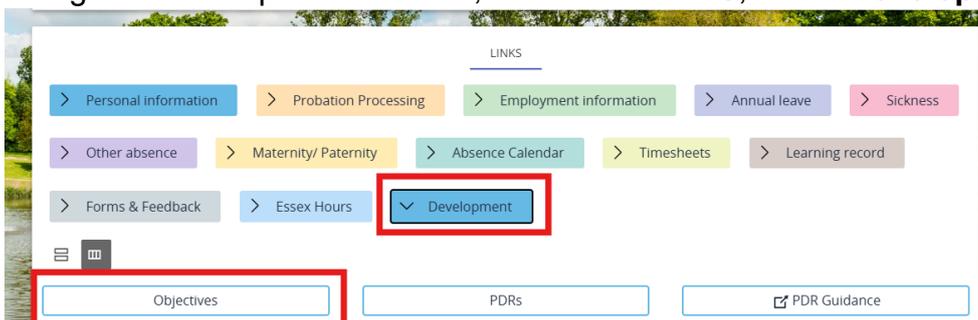

The reportee's objectives will then be displayed on the lefthand side of the screen. Filter using the drop down, then select a specific objective to view the objective details:

Talent profile summary

The **Talent Profile Summary** provides a list of **Learning events** that a reviewee has attended or us currently on the waiting list for. It also includes a list of any **Personal learning events** the reviewee has recorded.
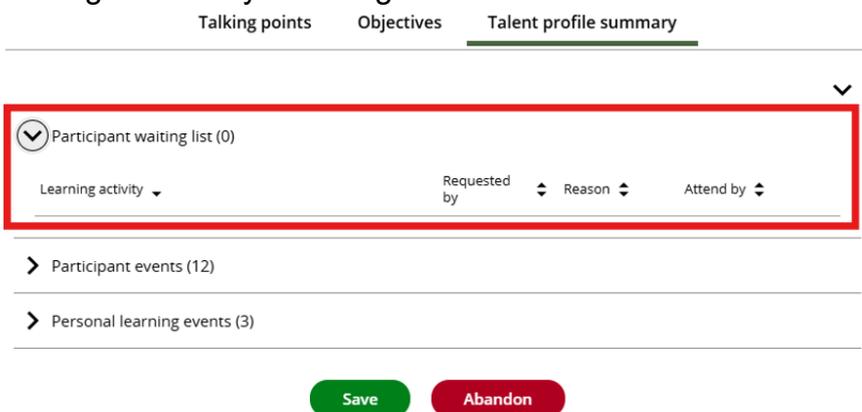
Navigate to the Talent profile summary section of the PDR form:
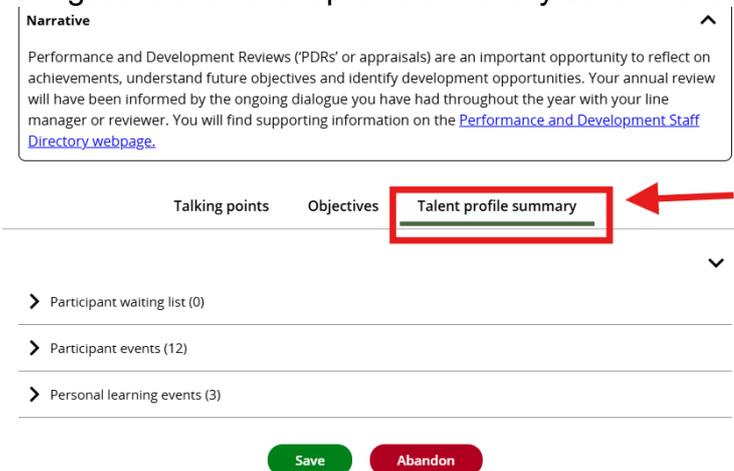
Expand the categories to see a list of learning events.

Participant waiting list

This is a list of Learning events that the reviewee is booked onto the waiting list for via HR Organiser. From the screenshot below, we can see that this reviewee is not currently on the waiting list for any Learning events:

Participant events

This is a list of Learning events that the reviewee has either **Completed**, **Booked**, or **Cancelled** via HR Organiser**:**

Personal learning events

This is a list of any Personal learning events that the reviewee has recorded in HR Organiser. How We Work at Essex training will also appear in this list:
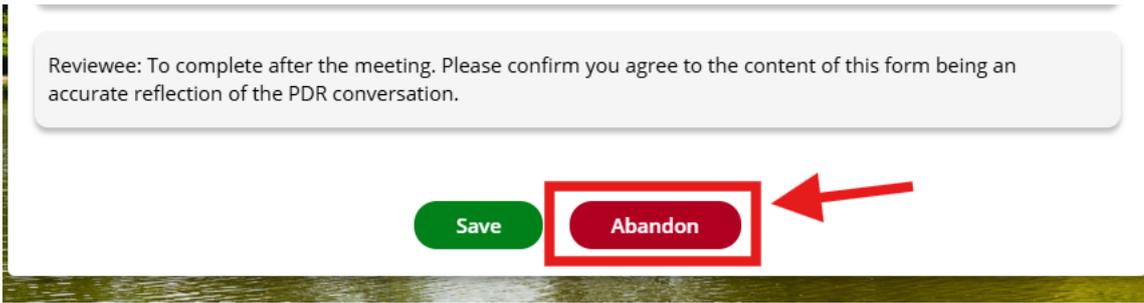

Abandoning a review

If you need to abandon a review for any reason, such as an employee leaving the organisation, or being on maternity leave, you can do so. Open a reviewee's PDR form and scroll to the bottom.

Then select **Abandon**:

This review will now be categorised as **Abandoned**. This will stop any email reminders relating to this review from being sent.

Note, when an employee leaves the University, their PDR forms will automatically become inaccessible – therefore it is not a necessary step.

Submitting and completing a review

Submit the review

The ability to **Submit** the PDR form prior to completion is in case multiple reviewees are accessing the form. This allows each of them to submit their contributions, before the form is completed. This step still needs to be completed even if there is only one reviewer.
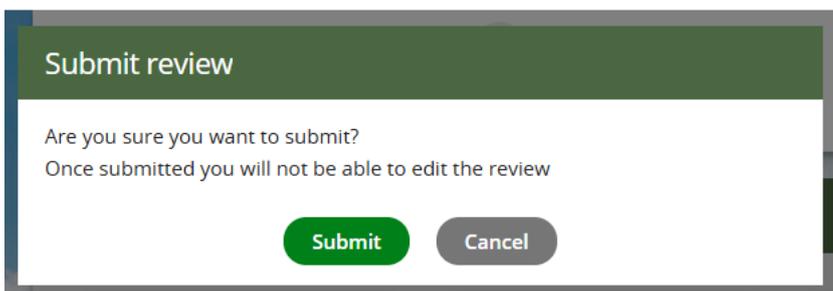
> **Note:** You will **not be able to make any changes** once you submit the form.

Once the PDR form has been signed off by both Reviewer and Reviewee, select the **Submit review** button in the top of the form:
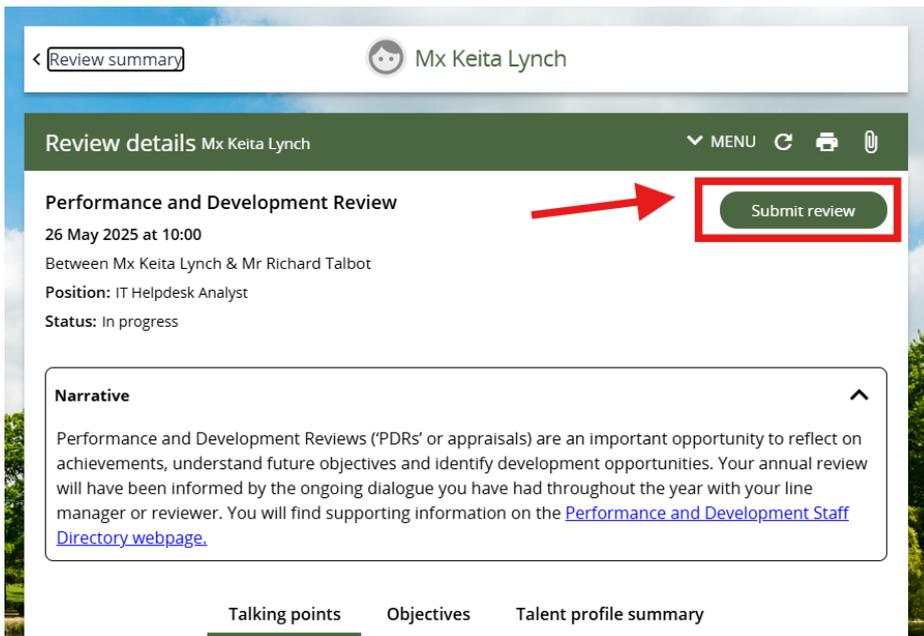
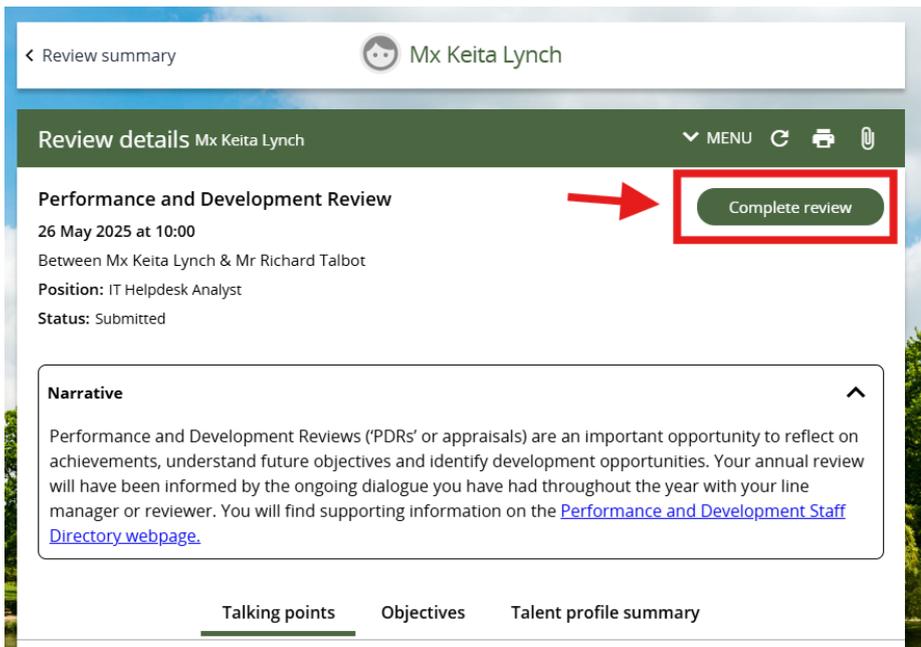If you are certain that you **do not need to edit the PDR form any further**, select **Submit**.

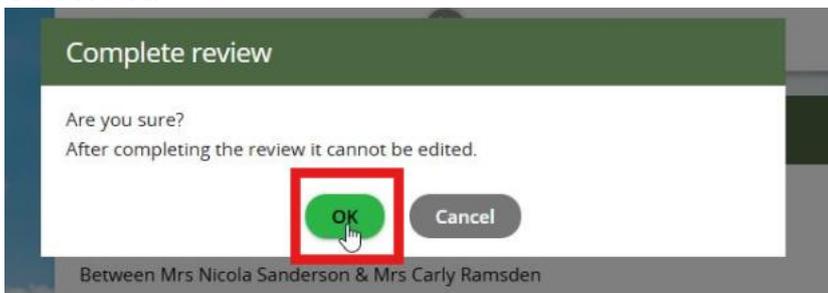If you **still need to make changes**, select **Cancel**:

Complete the review

If you still have the PDR form open from submitting...

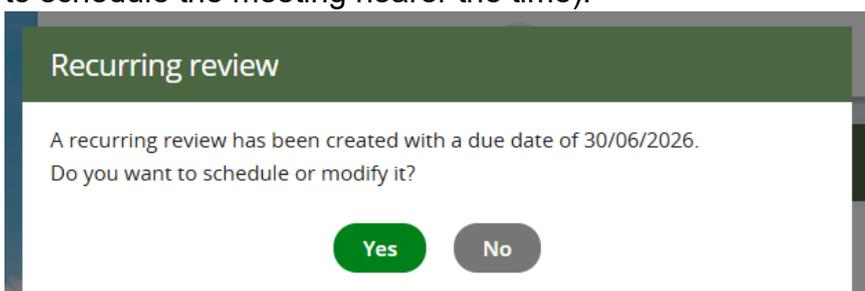You can now select the **Complete review** button in the top right of the screen:

Select **OK**:

On the next screen, you can **schedule next year's PDR meeting now** by selecting **YES**.

If you wish to **schedule next year's PDR at a later date**, select **NO** (you will receive a reminder to schedule the meeting nearer the time):

If you submitted the PDR form, but have since navigated away...

Go to the Review Summary page and use the **Reviews search block** to filter for Submitted reviews:

Select the Review details button next to the relevant review:

You can now select the **Complete review** button in the top right of the PDR form:

To complete the review, click **OK**:
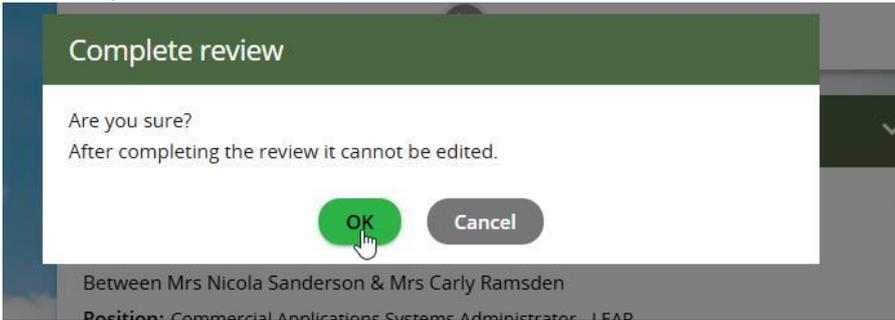
On the next screen, you can **schedule next year's PDR meeting now** by selecting **YES**.

If you wish to **schedule next year's PDR at a later date**, select **NO** (you will receive a reminder to schedule the meeting nearer the time):
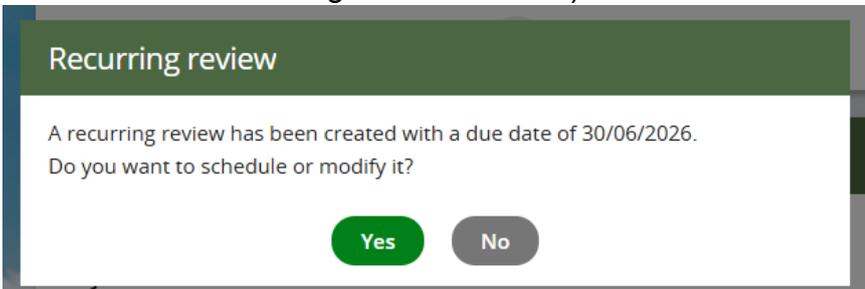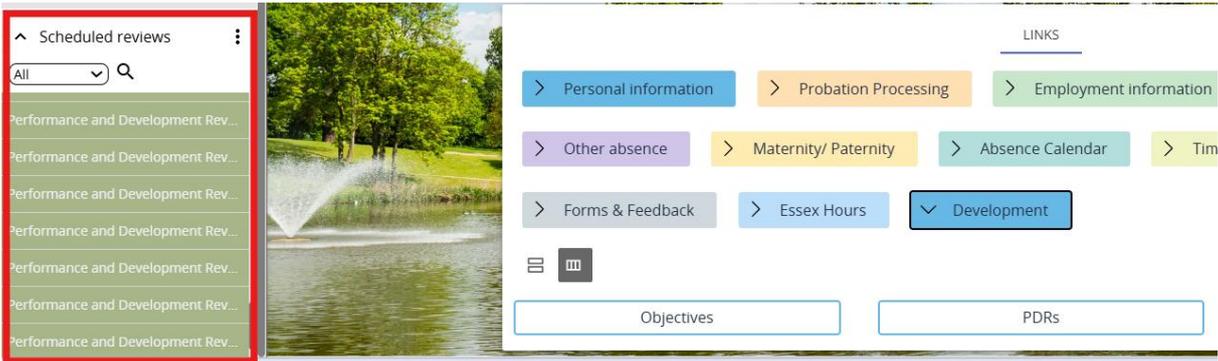

Access a reportee's reviews from their employee record

In addition to the Reviews module, you can also access a specific reportee's reviews through their employee record.
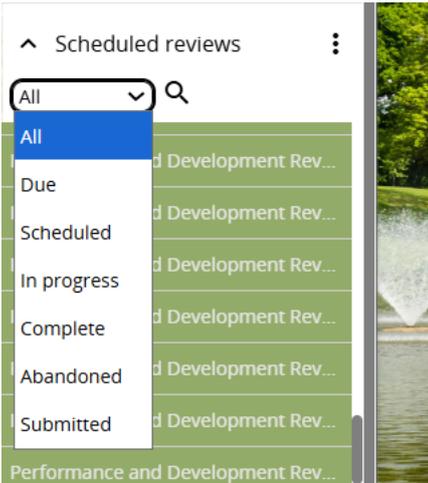
Navigate to a specific reportee's record, then from the Links, select **Development > PDRs**:
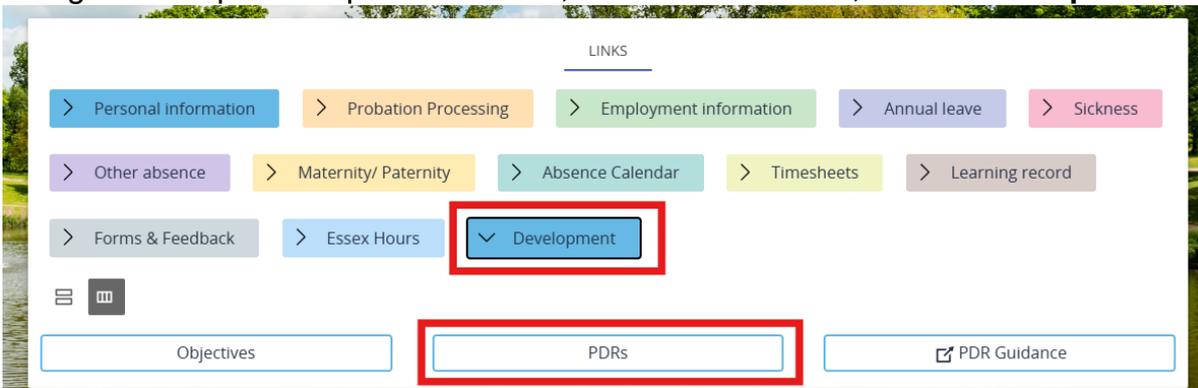
A list of the reportee's reviews will then appear on the left-hand side of the screen:

Use the status filter to narrow down your search:

Select a specific review to view the PDR form details: