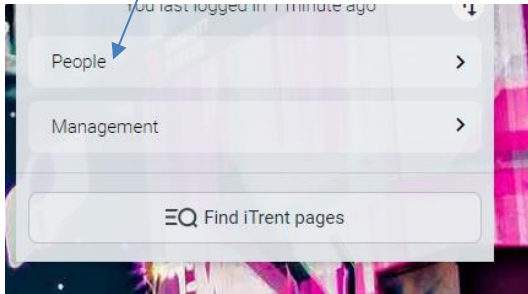


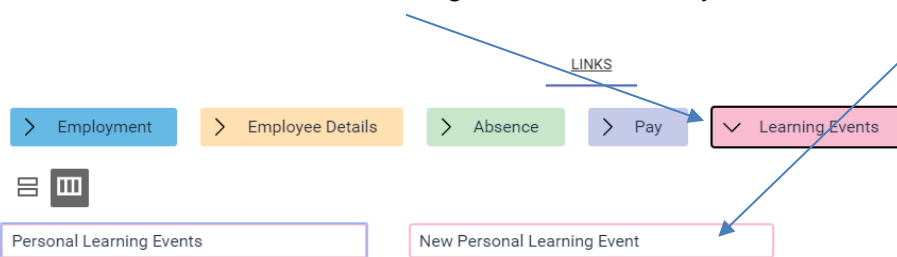
How to add a PDR and attach a PDR form in iTrent

This is useful for storing PDR documents or for 121 notes.

Select People and search for your employee:



Once in their record, select Learning Events followed by New Personal Learning Event



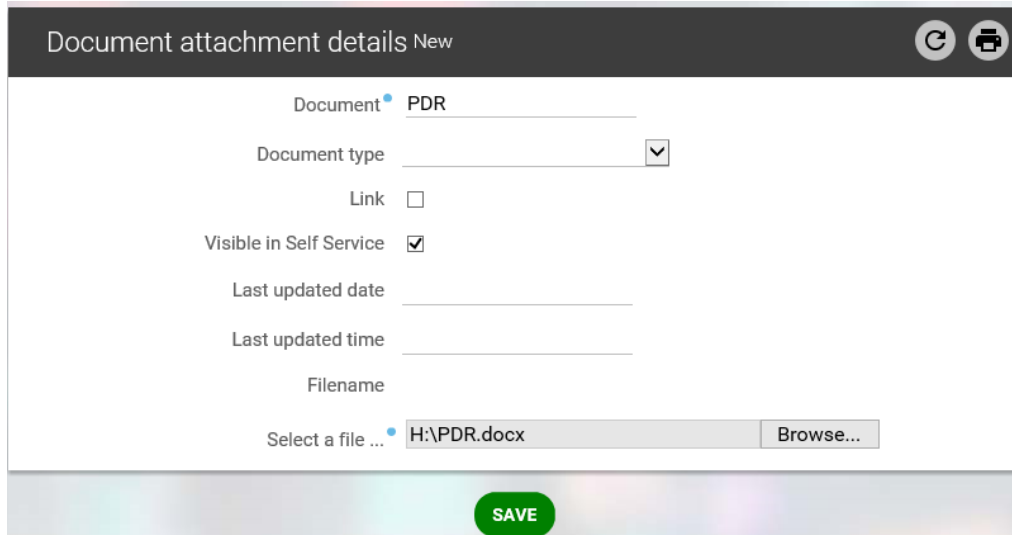
Enter the PDR (for example) as below

A screenshot of the 'Personal learning event details' form in iTrent. The form is titled 'Personal learning event details New' and has a 'MENU' button. It contains several sections: 'Event' with fields for 'Event title' (PDR), 'Internal' (checked), 'Start date' (25/02/2020), 'End date' (25/02/2020), 'Duration', 'Learning hours', 'Learning activity name' (PDR - Individual Meeting), 'Learning activity type' (Appraisal), 'Learning event code', and 'Renewal date'; 'Cost' with fields for 'Cost' and 'Currency' (British Pound); and 'Score' with fields for 'Completed' (checked), 'Score', and 'Failed'. A blue arrow points from the 'SAVE' button at the bottom to the paperclip icon in the top right corner of the form.

You must SAVE then click on the paperclip.

Complete the details as below (you can call your document whatever you wish). Tick visible in self service and select your file (Browse). **It is advisable to attach the document as PDF rather than a WORD document.**

SAVE

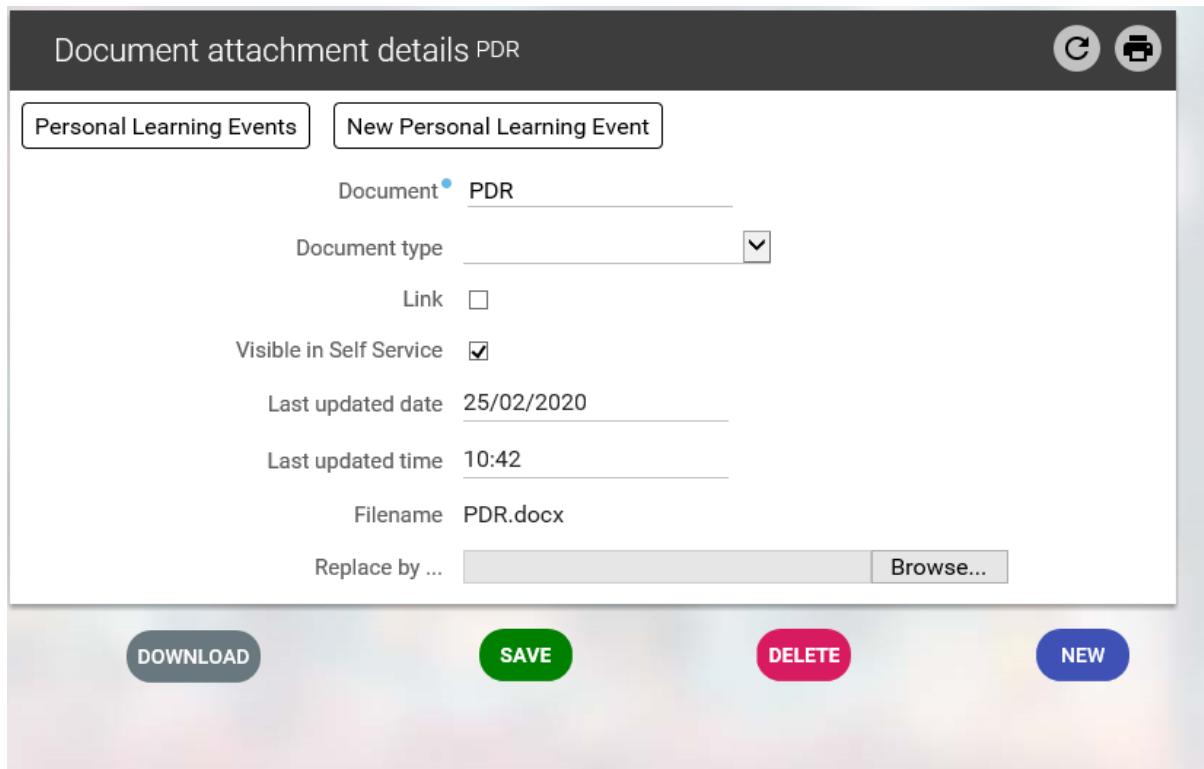


The screenshot shows a web form titled "Document attachment details New". The form contains the following fields and controls:

- Document: PDR
- Document type: [dropdown menu]
- Link:
- Visible in Self Service:
- Last updated date: [text input]
- Last updated time: [text input]
- Filename: [text input]
- Select a file ...: H:\PDR.docx [Browse...]

A green "SAVE" button is located at the bottom center of the form.

Example of a completed screen:



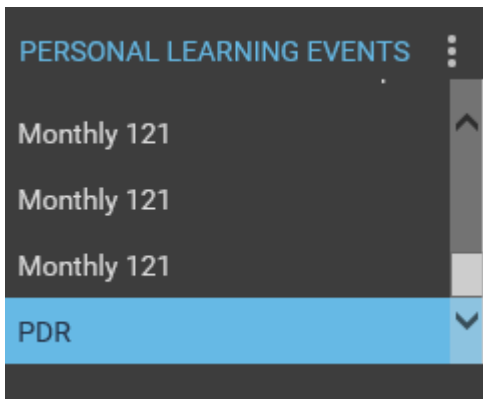
The screenshot shows the same form titled "Document attachment details PDR". It includes two tabs: "Personal Learning Events" and "New Personal Learning Event". The form fields are populated with the following information:

- Document: PDR
- Document type: [dropdown menu]
- Link:
- Visible in Self Service:
- Last updated date: 25/02/2020
- Last updated time: 10:42
- Filename: PDR.docx
- Replace by ...: [text input] [Browse...]

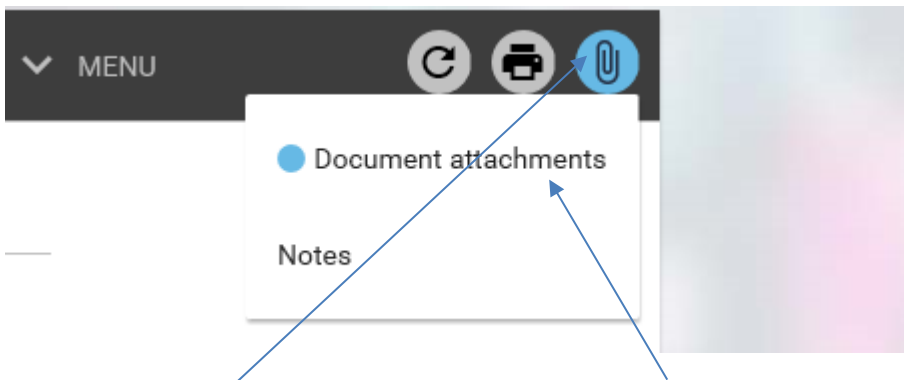
At the bottom of the form, there are four buttons: "DOWNLOAD" (grey), "SAVE" (green), "DELETE" (red), and "NEW" (blue).

If you want to go back to print off the attachment at a later date -

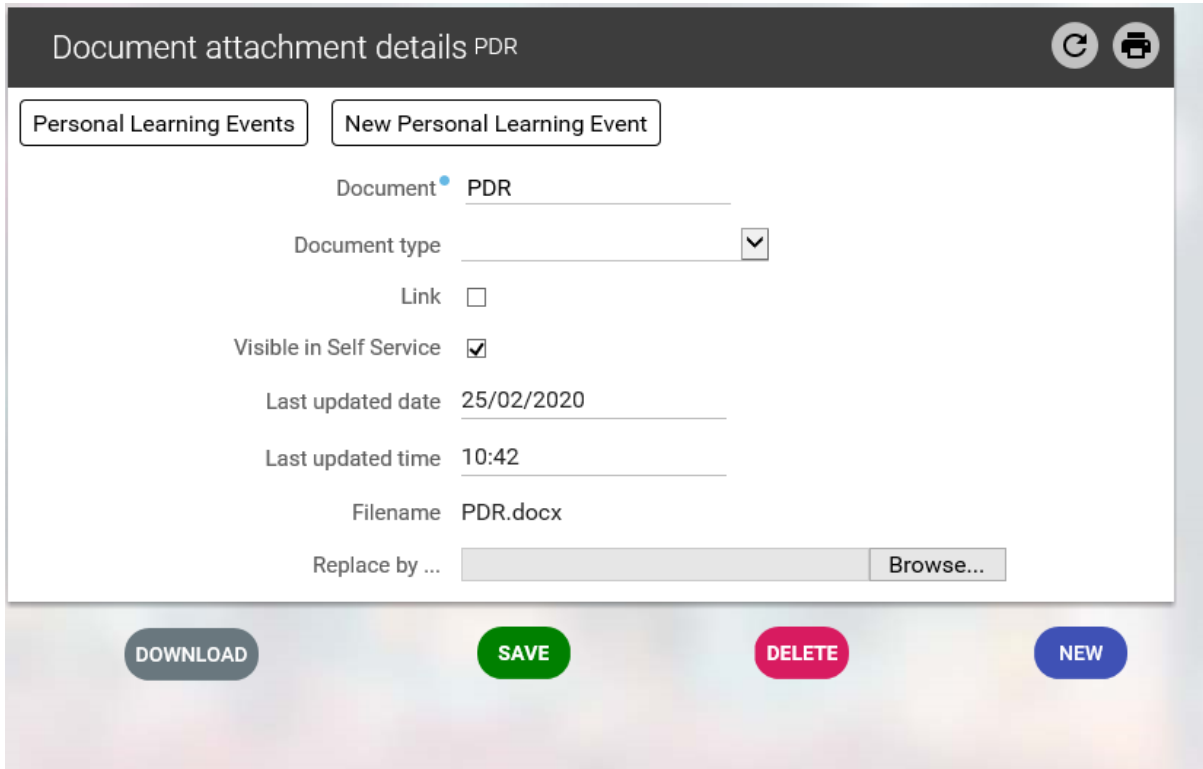
Select the PDR learning event here:



And you will see the paperclip is blue which shows there is a document attached:



Click onto the paperclip followed by Document attachments:



Click DOWNLOAD and you'll be able to print/view/save or email the document.

