P&DR How-to Guide

P&DR FAQs

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P&DR FAQs

What if the reviewer/senior reviewer assigned to me is incorrect?

Each Faculty / School / Directorate has a P&DR administrator who can edit the reviewee/reviewer/senior reviewer relationships within their area. Please go to the following page to find the details of the P&DR administrator in your area: http://www.staffnet.manchester.ac.uk/employment/pdr/

How to change P&DR roles (reviewee/reviewer/senior reviewer) in the system?

If your role has changed, you need to contact your local P&DR administrator to make the change in the system for you. http://www.staffnet.manchester.ac.uk/employment/pdr/

My P&DR has been submitted, can I change my reviewer if I later find it's not correct?

Yes, please contact your local P&DR administrator and ask them to return your P&DR to draft also advising them of the change of reviewer. Once that change is made you will need to resubmit your P&DR.

I have two managers/supervisors what do I do?

If a person reports to two reviewers, one will be set as a primary reviewer. Please contact your local <u>HR partner</u> to consult as to who should be the primary reviewer.

Can I access the system from home?

Yes. If you have a University managed computer and use Global Protect to log in you should not encounter a problem when accessing the P&DR system from home. If you are using your own personal computer you must either remote into your desktop using WakeIT or have VPN software installed. Details of VPN software can be found on the IT Services web site. https://www.itservices.manchester.ac.uk/ourservices/popular/vpn/

My P&DR document is failing to upload to the website?

The first thing to check is that the file size has not exceeded 10MB. You are allowed only 1 master document (PDR template) and 5 supporting documents as a maximum. Please also check that you only have one P&DR in draft. You can check this by clicking on the orange MY P&DRs button on the right hand side of the screen. If you have more than one draft, please delete the draft/s that you do not intend to submit.

Who can see my P&DRs?

Within the system, only your reviewer and senior reviewer can see your P&DRs. Once you are assigned to new reviewer/senior reviewer, they will also inherit the access to your P&DRs.

Who else can I contact if I have questions regarding P&DR?

For any HR issues, or PDR guidance, please refer to <u>HR page</u> or contact your local HR Partner - <u>HR</u> partner.

On the HR page, there are also FAQs for reviewee/reviewer to clarify questions you might have for P&DR process in general.

You can also speak to your local P&DR administrator or email <u>PDR@manchester.ac.uk</u> including details of your questions, any error messages you are encountering and including relevant screen shots.

System has timed out, what should I do?

Once the system is timed out, you will need to refresh the page or re-authenticate to log back into the system.

How to select the correct P&DR year

The requirement to select the correct P&DR year has been removed. The P&DR system will select the year for you to ensure that it is always submitted for the correct P&DR year.

Can reviewer make further amendments to the P&DR document after returning it to the Reviewee?

This is possible. However, only one participant in the workflow is allowed to edit the P&DR document at any one time. This prevents the Reviewer from amending their review notes after the P&DR is returned to the Reviewee as the Reviewee will then potentially have two or more conflicting copies of the P&DR document. If a Reviewer needs to make further amendments to the P&DR document after returning it to the Reviewee then the Reviewee must be informed and should reject/query the P&DR and resubmit it for review.

For Reviewees:

1. How to login to the system.

Go to https://mypdr.app.manchester.ac.uk and login with your University username and password.

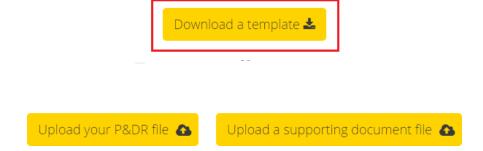
If you have a University managed computer and use Global Protect to log in you should not encounter a problem. If you are using your own computer you must either remote into your desktop using WakeIT or have VPN software installed. Details of VPN software can be found on the IT Services web site.

https://www.itservices.manchester.ac.uk/ourservices/popular/vpn/

2. How to download the P&DR template.

Once logged in you will be taken to the landing page which displays the generic P&DR template.

Upload your draft P&DR to begin



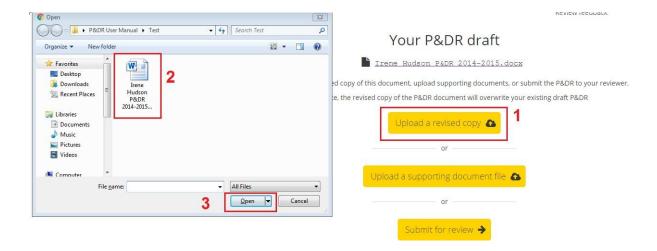
The P&DR template is also available for download (with specific guidance applicable to each area) on the HR's P&DR site: http://www.staffnet.manchester.ac.uk/employment/pdr/

- 3. How to upload a P&DR form or save a draft P&DR form.
- 1: Click "Upload your P&DR file".
- 2: Select the document you want to upload.
- 3: Click "Open"/"Upload" in the dialogue box to process the request.

3.1 How to upload a revised P&DR Form to the system.

A revised P&DR form can be uploaded to replace any previously uploaded draft/s before the document is submitted to the Reviewer.

- 1: Click "Upload a revised copy"
- 2: Select the document you want to upload.
- 3: Click "Open"/"Upload" in the dialogue box to process the request.
- NB With the latest release of the P&DR system you are not required to select the P&DR year for upload. The system will do this automatically for you.



3.2 How to upload a P&DR form after uploading a supporting document.

If you have already uploaded a supporting document:-

- 1: Click on "Upload your P&DR file".
- 2: Select the document you want to upload.
- 3: Click "Open"/"Upload" in the dialogue box to process the request.

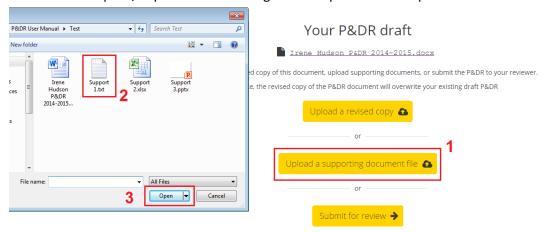


4. How to upload a supporting document/s.

If you have already uploaded a P&DR form:-

- 1: Click "Upload a supporting document file".
- 2: Select the document you want to upload.

3: Click "Open"/"Upload" in the dialogue box to process the request.



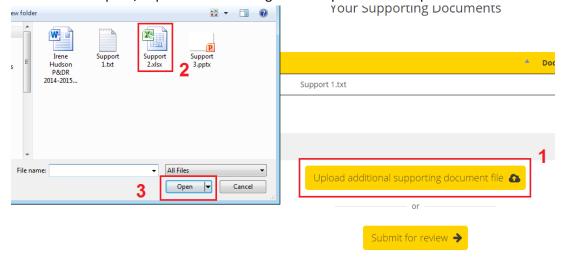
4.1 How to upload a supporting document first (before uploading a P&DR Form).

To upload a supporting document before uploading a P&DR form:-

- 1: Click "Upload a supporting document file"
- 2: Select the document you want to upload.
- 3: Click "Open"/"Upload" in the dialogue box to process the request.

4.2 How to upload an additional supporting document.

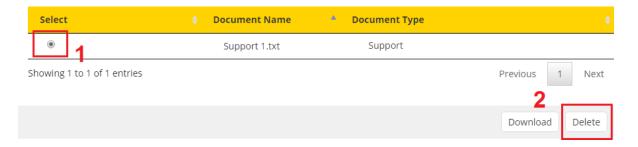
- 1: Click "Upload additional supporting document file"
- 2: Select the document you want to upload.
- 3: Click "Open"/"Upload" in the dialogue box to process the request.



4.3 How to upload a revised version of a supporting document.

To do so you will need to delete the existing document:-

- 1: Click in to the corresponding checkbox (on the left of the document name).
- 2: Click "Delete".

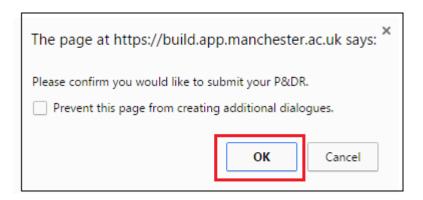


To upload a revised version of the supporting document, follow the steps outlined in 4, 4.1 or 4.2 (as required).

5. How to submit your P&DR document.

Click "Submit for review" on the main screen and click "OK" in the pop-up window to confirm your request.

	Your P&DR	draft	
	Irene Hudson P&DR 201	14-2015.docx	
	of this document, upload supporting revised copy of the P&DR document of Upload a revised co	will overwrite your existing di	
	or		
	Your Supporting Do	ocuments	
Show 25 ▼ entries			Search:
Select	Document Name	Document Type	
•	Support 1.txt	Support	
Showing 1 to 1 of 1 entries			Previous 1 N
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A confirmation screen with the message "Your P&DR has been submitted for review" indicates successful submission of the P&DR document and outlines the next steps.



Your P&DR has been submitted for review



What happens next?

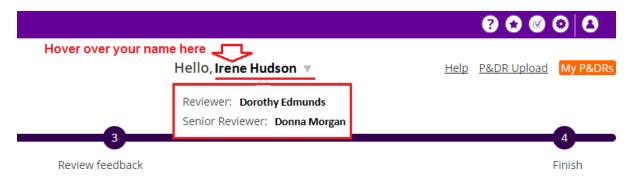
If not already done, you should now arrange a P&DR meeting with your reviewer, Dorothy Edmunds

After your meeting, your reviewer will send you an updated P&DR file with their comments. When this happens you'll be notified by email.

6. How to find your Reviewer and Senior Reviewer.

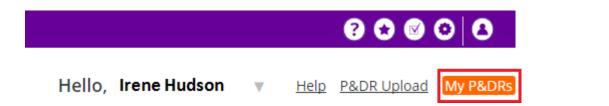
Hover over your name at the top right of the screen to display the names of the Reviewer and Senior Reviewer.

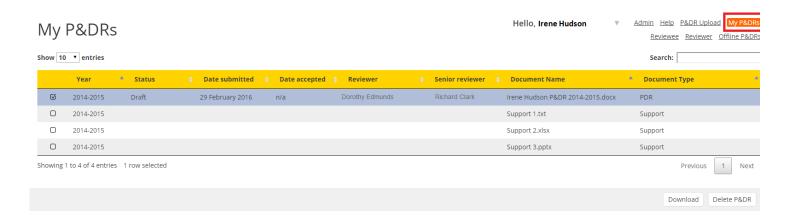
If the names displayed are incorrect contact your Reviewer to amend them.



7. How to find all of your P&DR documents.

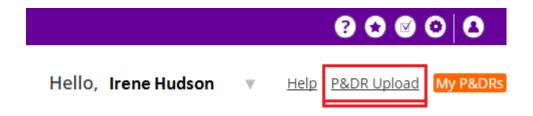
Past and current P&DR documents are available to view by clicking "My P&DRs" at the top right of the screen.





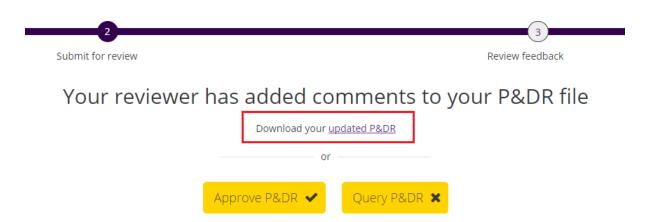
8. How to go back to the main P&DR screen from the "My P&DRs" page.

From the "My P&DRs" page, click "P&DR Upload" at the top right of the screen. Alternatively use the "refresh" or "reload" function on your web browser



9. How to download your P&DR feedback.

Once the Reviewer sends their feedback via the P&DR system you will be moved to the third stage - "Review Feedback". To download P&DR feedback, click the "Download your updated P&DR" link.



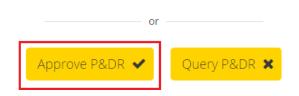
10. How to accept your P&DR feedback.

To accept the feedback sent by the Reviewer, click "Approve P&DR" then "OK" on the pop-up window to confirm your request.



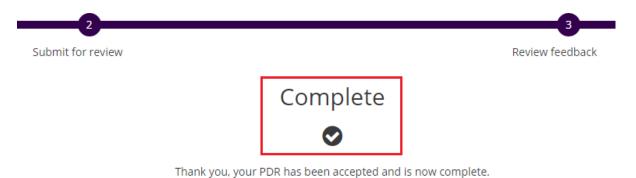
Your reviewer has added comments to your P&DR file

Download your updated P&DR





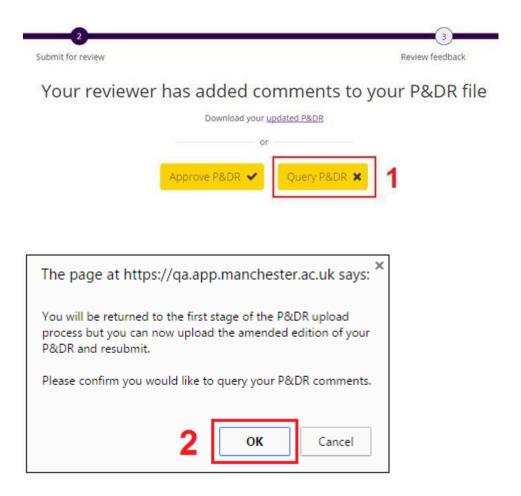
A confirmation screen with the message "Complete" will indicate your P&DR has been completed.



11. How to Query your P&DR feedback.

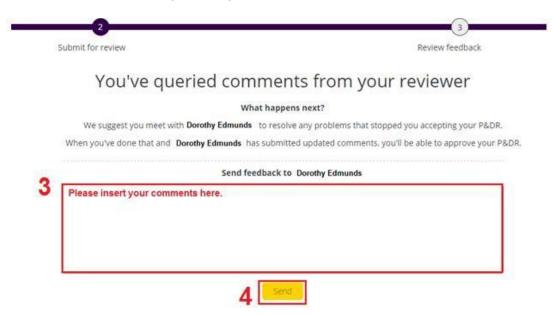
To query the feedback sent by the Reviewer:-

- 1: Click "Query P&DR".
- 2: Click "OK" in the pop-up window to confirm your request.



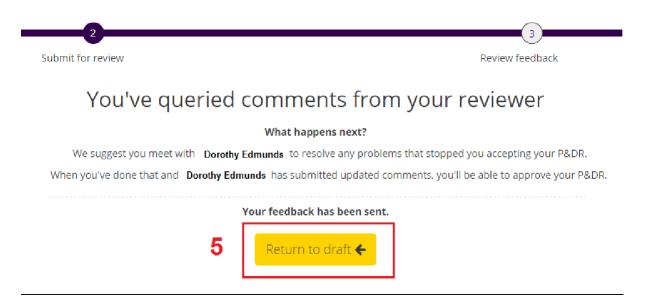
3: Complete the text box with your comments or request a meeting to review the feedback.

4: Click "Send" to complete the process.



A confirmation screen with the message "You've queried comments from your reviewer" will indicate the feedback has been sent.

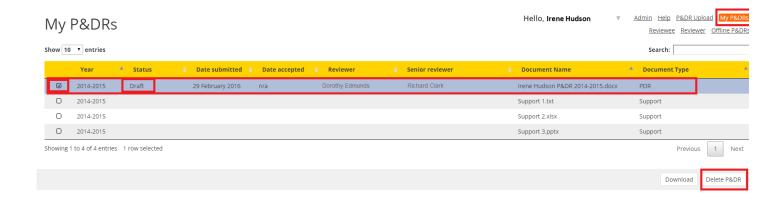
5: Click "Return to Draft" to restart the P&DR process.



12. How to delete a draft P&DR document.

From the "MY P&DRs" page, select the P&DR document to be deleted by clicking in to the checkbox that corresponds with the document, then click "Delete" to process the request.

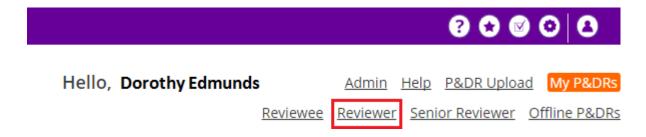
N.B. Only P&DR documents in a "Draft" status can be deleted



For Reviewer:

1. How to go to the "Reviewer" page

Click "Reviewer" button at the top right of the screen.



2. How to go to the main P&DR screen ("Reviewee" page) from "Reviewer" page.

From the "Reviewer" page, you can click the "P&DR Upload" button or "Reviewee" at the top right of the screen.



3. How to find a list of your Reviewees.

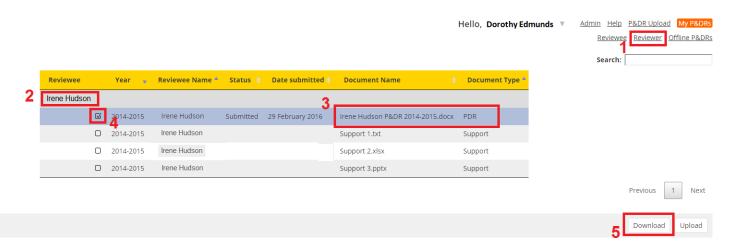
Go to the "Reviewer" page to display a list of your reviewees.



4. How to download P&DR document submitted by your Reviewee.

To download P&DR document submitted by your reviewee, you need to:

- 1: Go to the "Reviewer" page
- 2: Find the name of person you are downloading the P&DR document from.
- 3: Locate the name of the relevant P&DR document to download.
- 4: Select the document to download by clicking in the appropriate checkbox.
- 5: Click "Download" to download the P&DR document from your Reviewee

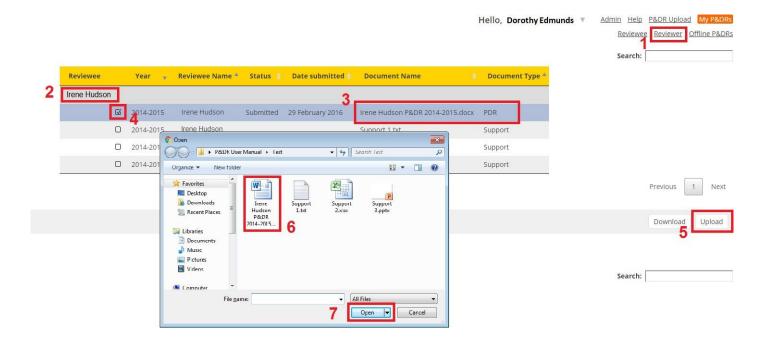


5. How to upload your feedback to your Reviewee.

- 1: Click Reviewer to go to your "Reviewer" page
- 2: Locate the name of person you are uploading the P&DR document to
- 3. Identify the document entry you want to upload to.
- 4. Select the relevant P&DR document entry by clicking the corresponding checkbox.

N.B. A Reviewer can only upload a revised P&DR Form with the existing P&DR Form. Supporting documents do not need to be re-uploaded.

- 5: Click "Upload" button
- 6: Select the document to upload,
- 7: Click "Open" / "Upload" upload in the dialogue box to process the request.



6. How to go to the "Offline P&DR" page

Click "Offline P&DR" button at the top right of the screen.

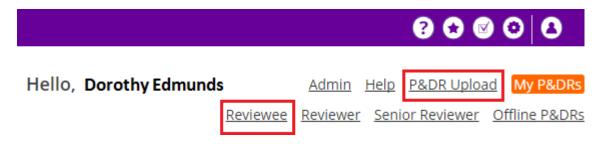
Hello, Dorothy Edmunds

Admin Help P&DR Upload My P&DRs

Reviewee Reviewer Senior Reviewer Offline P&DRs

7. How to go to the main P&DR screen ("Reviewee" page) from the "Offline P&DR" page.

Click "P&DR Upload" button or "Reviewee" button at the top right of the screen.



- 8. How to upload P&DR documents for an "Offline reviewee".
- 1: Go to the "Offline P&DR" page
- 2: Click "Choose file"
- 4: Choose the document you want to upload,
- 5: Click "Open" or "Upload" in the dialogue box to process the request.
- 6: Click "Upload" to upload the P&DR document
 - 9. How to upload P&DR documents for an "Offline reviewee".
- 1: Go to the "Offline P&DR" page
- 2: Click "Choose file"
- 4: Choose the document you want to upload,
- 5: Click "Open" or "Upload" in the dialogue box to process the request.
- 6: Click "Upload" to upload the P&DR document

10. How to upload P&DR documents for an "Offline reviewee".

- 1: Go to the "Offline P&DR" page
- 2: Click "Choose file"
- 4: Choose the document you want to upload,
- 5: Click "Open" or "Upload" in the dialogue box to process the request.
- 6: Click "Upload" to upload the P&DR document

11. How to upload P&DR documents for an "Offline reviewee".

- 1: Go to the "Offline P&DR" page
- 2: Click "Choose file"
- 4: Choose the document you want to upload,
- 5: Click "Open" or "Upload" in the dialogue box to process the request.
- 6: Click "Upload" to upload the P&DR document

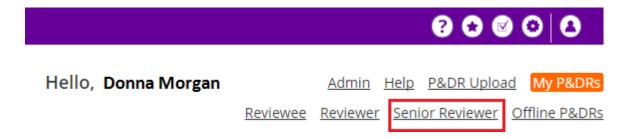
12. How to upload P&DR documents for an "Offline reviewee".

- 1: Go to the "Offline P&DR" page
- 2: Click "Choose file"
- 4: Choose the document you want to upload,
- 5: Click "Open" or "Upload" in the dialogue box to process the request.
- 6: Click "Upload" to upload the P&DR document

For Senior Reviewer:

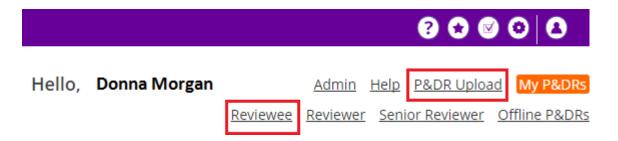
1. How to go to the "Senior Reviewer" page

Click "Senior Reviewer" button at the top right of the screen.



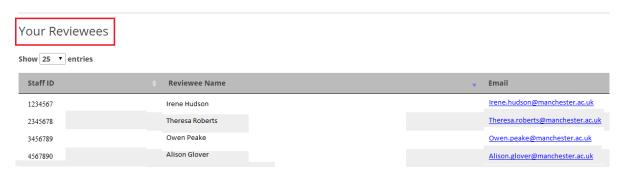
2. How to go to the main P&DR screen ("Reviewee" page) from the "Senior Reviewer" page

Click on "P&DR Upload" or "Reviewee" at the top right of the screen.



3. How to find a list of your Reviewees

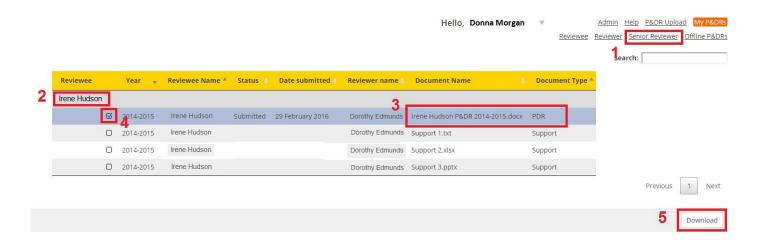
Go to the "Senior Reviewer" page to display a list of your Reviewees.



4. How to download P&DR document submitted by your reviewee.

- 1: Click Senior Reviewer
- 2: Locate the name of the Reviewee
- 3: Identify the document you want to download.
- 4: Select the P&DR document to download by clicking in the corresponding checkbox.
- 5: Click "Download" to download the P&DR document from the Reviewee.

Repeat steps 3-5 to download all required documents.



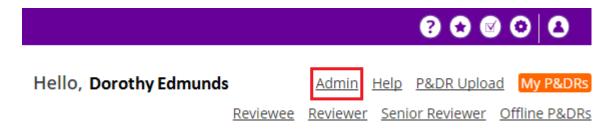
For Admin:

Revised P&DR Admin Screen (release 2020)



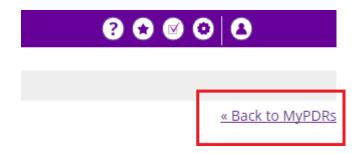
1. How to go to the "Admin" page.

To go to the "Admin" page, please click the "Admin" button at the top right of the screen.



2. How to go to the main P&DR screen ("reviewee" page) from the "Admin" page.

To go to the main P&DR screen from the "Admin" page, please click "Back to MyP&DRs" button in the top right of the screen.



3. How to add a reviewee to the system.

Go to the "Admin" page:

- 1: Click the "Add Reviewee" button.
- 2: Search for the person by name, email address or SPOT ID, and then click the "Find" button.
- 3: Choose the appropriate record by clicking the "radio button" in front of their record.
- 4: Click "Add Online Reviewee" or "Add Offline (Paper) Reviewee" button to process the request.

4. How to add/remove reviewee as "offline reviewee".

Go to the "Admin" page:

- 1: Click the "Offline Status" button.
- 2: Search for the person by name, email address or SPOT ID, and then click the "Find" button.
- 3: Choose the appropriate record by clicking the "radio button" in front of their record.
- N.B. Multiple records may be returned at this stage, depending upon the search criteria. Select the correct record by reviewing "email, job title and/or Organisation".
- 4: Click the "Add Offline Status" or "Remove Offline Status" button to process the request
 - 5. How to assign the "Admin" role to reviewee.

If you require an colleague to be given P&DR admin rights, please email PDR@manchester.ac.uk with your Request.

6. How to remove the "Admin" role from administrator.

Please email PDR@manchester.ac.uk with your request.

7. How to assign the "Reviewer" role to reviewee.

Go to "Admin" page.

- 1: Click the "Add Reviewer" button
- 2: Search for the person by name, email address or SPOT ID, and then click "Find" button
- 3: Choose the correct record by clicking the "radio button" in front of their record
- 4: Search for the authorising person by **name**, **email address or SPOT ID**, and then click the "Find" button
- 5: Choose the correct record by clicking the "checkbox" in front of their record
- 6: Click the "Add Reviewer Role" button to process the request

8. How to remove the "Reviewer" role from reviewer.

Go to "Admin" page:

- 1: Click the "Remove Reviewer" button
- 2: Search for the person by name, email address or SPOT ID, and then click the "Find" button
- 3: Choose the correct record by clicking the "checkbox" in front of their record
- 4: Click "Remove Reviewer Role" button to process the request

N.B. You will not be able to remove the reviewer role from a record until all reviewees have been reassigned to another reviewer.

9. How to assign the "senior reviewer" role to a reviewee.

To assign the "senior reviewer" role to a reviewee, you must go to "Admin" page, you should then follow the steps below:

- Step 1: Click "Add Senior Reviewer" button
- Step 2: Search person by name, email address or SPOT ID, and then click "Find" button
- Step 3: Choose the correct record by clicking the "radio button" in front of their record
- Step 4: Search authorising person by name, email or SPOT ID, and then click "Find" button
- Step 5: Choose the appropriate record by clicking the "radio button" in front of their record
- Step 6: Click the "Add Senior Reviewer Role" button to process the request

10. How to remove the "senior reviewer" role from the senior reviewer.

Go to the "Admin" page:

Step 1: Click the "Remove Senior Reviewer" button

- 2: Search for the person by name, email address or SPOT ID, and then click the "Find" button
- 3: Choose the correct record by clicking the "radio button" in front of their record
- 4: Click the "Remove Senior Reviewer Role" button to process the request
- N.B. You will not be able to remove the senior reviewer role from a record until all reviewees have been reassigned to another senior reviewer.
 - 11. How to assign/change reviewer for reviewee.

Go to "Admin" page.

- 1: Click "Assign Reviewer" button
- 2: Search for the reviewee by name, email address or SPOT ID, and then click the "Find" button
- 3: Select the correct record by clicking the "checkbox" in front of their record
- 4: Search for the reviewer by name, email address or SPOT ID, and then click the "Find" button
- 5: Choose the correct record by clicking the "checkbox" in front of their record
- 6: Click the "Assign Reviewer" button to process the request
- N.B. You can only assign reviewer when reviewee's P&DR is either in Draft status, Approved status, or no P&DR exists. If the P&DR is Submitted or Returned, please "Reset P&DR" first.
 - 12. How to assign/change the senior reviewer for a reviewee.

Go to the "Admin" page.

- 1: Click the "Assign Senior Reviewer" button
- 2: Search reviewee by name, email address or SPOT ID, and then click the "Find" button
- 3: Choose the appropriate record by clicking the "radio button" in front of their record
- 4: Search for the senior reviewer by name, email address or SPOT ID, and then click "Find" button
- 5: Choose the correct record by clicking the "radio button" in front of their record
- 6: Click the "Assign Senior Reviewer" button to process the request
- N.B. You can only assign senior reviewer when reviewee's P&DR is either in Draft status, Approved status, or no P&DR exists. If the P&DR is Submitted or Returned, please "Reset P&DR" first.

13. How to reset P&DR document status from Submitted to Draft.

To reset a P&DR document for a reviewee, you should go to "Admin" page, you must then follow the steps below:

- 1: Click the "Rest P&DR" button
- 2: Search for the reviewee by name, email address or SPOT ID, and then click the "Find" button
- 3 & 4: Choose the correct record and associated PDR document by clicking the "radio button" in front of their record

N.B. In the January 2020 release of the system it is now possible to reset a P&DR to draft at any stage within the process

5: Click "Reset P&DR" button to process the request.

14. How to run a P&DR status report

To run a status report of P&DRs within your School / Faculty / Directorate

- 1: From the admin screen select PDR status
- 2: From the dropdown menu select your School / Faculty / Directorate
- 3: Click SEARCH
- 4: To export to an excel spreadsheet click Export to Excel

15. How to run a report of Reviewee / Reviewer / Senior Reviewer relationships

(This report is typically run before the start of the P&DR year to ensure the relationships are correct)

- 1: From the admin screen select Reviewee Reviewer
- 2: Click SEARCH
- 3: To export to an Excel spreadsheet click Export to Excel

16. To check a single Reviewee / Reviewer / Senior Reviewer relationship

- 1: From the admin screen select Reviewee Reviewer
- 2: Click SEARCH
- 3: In the search box (right hand side of the screen) enter the name of the reviewee that you are looking for.