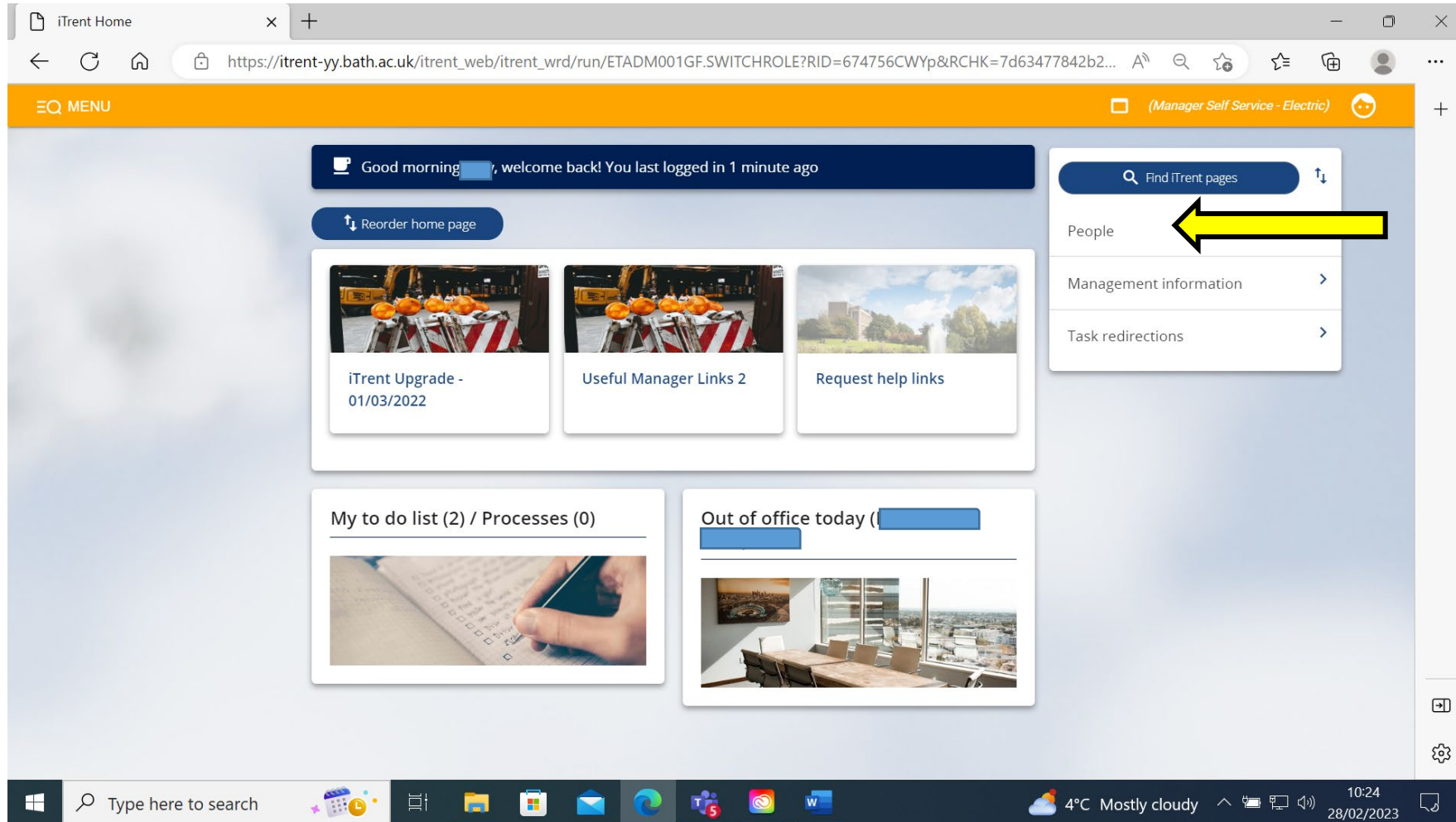


Line Manager Guidance to uploading SDPR Forms in Manager Self Service (MSS)

- Log in to MSS - this will take you directly to the MSS Homepage. Click on the 'People' button on the menu on the right-hand side.



- Your list of direct reports will appear on the left-hand side of the screen. Select the person you wish to update information on.

The screenshot displays the iTrent web application interface. The browser address bar shows the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETADM001GF.SWITCHROLE?RID=674756CWYp&RCHK=7d63477842b2.... The page title is "Person summary - iTrent".

The interface includes a left-hand navigation pane with the following sections:

- Organisation:** University of Bath
- People:** A search bar with "Surname" and a plus icon. Below it, it says "Results 3 People" and "Save this group". A list of three people is shown, each with a profile picture and a name field. A large yellow arrow points to this list.

The main content area features a welcome message: "Good morning [redacted], welcome back! You last logged in 1 minute ago". Below this is a "Reorder home page" button. The dashboard contains several tiles:

- iTrent Upgrade - 01/03/2022**
- Useful Manager Links 2**
- Request help links**
- My to do list (2) / Processes (0)**
- Out of office today (1)**

On the right side, there is a "Find iTrent pages" search bar and a list of links: "People", "Management information", and "Task redirections".

The Windows taskbar at the bottom shows the search bar, task view, and various application icons. The system tray displays the weather as "5°C Mostly cloudy" and the time as "10:30 28/02/2023".

- Click on the 'Development and adjustments' link. This will bring up a menu at the bottom of the page, click on 'New Development & Performance Reviews'. This will start the two-step SDPR Process Chain.

The screenshot displays the iTrent web application interface. The left sidebar shows the 'Organisation' as 'University of Bath' and 'People' with a search bar. The main content area includes a 'Calendar' section with a date range of '02 - 15 March 2023' and a 'LINKS' section. The 'LINKS' section contains several buttons: 'Calendar', 'Holiday', 'New Sickness Details', 'View Sickness Details', 'Other absence', 'Development and adjustments', 'Probation', 'FTC Consultations', 'Timesheet claims', 'Personal information', 'Position information', and 'Pattern overrides'. A yellow arrow points to the 'Development and adjustments' button. Below the 'LINKS' section, there is a 'Training record' button and a 'Development and performance reviews' button. A second yellow arrow points to the 'New Development & Performance Reviews' button. The bottom of the screen shows the Windows taskbar with the search bar, taskbar icons, and system tray information including the date '02/03/2023' and time '11:48'.

Person summary - iTrent

https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=FA33F6058BE67C741944447DFB...

02/03/2023

SEARCH FIND ITRENT PAGES

Organisation

University of Bath

People

Surname

Results 3 People

Select all Save this group

Reviews

SDPR +

SDPR +

SDPR +

SDPR +

Calendar

VIEW FULL CALENDAR

02 - 15 March 2023

02 03 04 05 06 07 08 09 10 11 12 13 14 15

1 Sep 2022 - 31 Aug 2023

75.93 of 335.53 hours

Holidays remaining (as of last calculation)

2 Mar 2022 - 2 Mar 2023

5 days

Days off sick (as of last calculation)

LINKS

> Calendar > Holiday > New Sickness Details > View Sickness Details > Other absence

> Development and adjustments > Probation > FTC Consultations > Timesheet claims

> Personal information > Position information > Pattern overrides

Training record Development and performance reviews New Development & Performance Reviews

Reviews & Personal Circumstances files Training Document Attachments

Type here to search

6°C Cloudy

11:48 02/03/2023

- Step 1 - enter the SDPR review information:
 - Review type – click on the pull-down menu and choose 'SDPR or SDPR+', whichever is appropriate.
 - Date occurred – enter the date the SDPR meeting took place.
 - Overall rating – click on the pull-down menu and select 'SDPR/SDPR+ - conversation completed'.
 - New review date – enter the date the next SDPR should be held.

The screenshot shows a web browser window with the URL https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=FA33F6058BE67C741944447DFB.... The page is titled "Review details - iTrent" and shows "Step 1 of 2" in the "Chain: SDPR Chain".

The "Review details New" form contains the following fields:

- Job title * (dropdown menu)
- Review type * (dropdown menu, selected: SDPR +)
- Date occurred * (text input, 19/10/2022, with a calendar icon)
- Overall rating * (dropdown menu, selected: SDPR/SDPR+ - conversation c)
- Next review date * (text input, 19/10/2023, with a calendar icon)

A green "Save" button is located at the bottom right of the form. A large yellow arrow points to this button.

The left sidebar shows the "University of Bath" logo and a search bar. Below the search bar, there are sections for "People" and "Reviews". The "Reviews" section lists several "SDPR +" entries.

The bottom of the screen shows a Windows taskbar with the search bar, task icons, and system tray information including the date "02/03/2023" and time "12:26".

- Click on the 'Save' button and then click on the black arrow at the top right-hand side of the screen, this will take you to Step 2.

The screenshot shows the iTrent web application interface. The browser address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=FA33F6058BE67C741944447DFB.... The page header includes the iTrent logo, the date 02/03/2023, and a user profile icon with the text "(Manager Self Service - Electric)".

The left sidebar contains navigation options: "Organisation" (University of Bath), "People" (Surname search), and "Reviews" (SDPR +). The main content area shows "Step 1 of 2" and "Chain: SDPR Chain". A "Review details" form for "Weeks, Kym" is displayed, containing the following fields:

- Job title: [Text input field]
- Review type*: SDPR + [Dropdown menu]
- Date occurred*: 19/10/2022 [Calendar icon]
- Overall rating*: SDPR/SDPR+ - conversation c [Dropdown menu]
- Next review date*: 19/10/2023 [Calendar icon]

A green "Save" button is located at the bottom of the form. A yellow arrow points to a black arrow in the top right corner of the main content area, indicating the next step in the process.

- Step 2 - upload the SDPR form onto MSS:
 - Document – enter an appropriate title for the document e.g. 'SDPR Form 2022-23'.
 - Document Type – click on the pull-down menu and choose either 'SDPR or SDPR+'.
 - Visible in Self Service – tick this box so that it can be viewed by the employee in ESS.
 - Select a file – click on the 'Browse' button and attach the SDPR form.
- Click the 'Save' Button.

The screenshot shows the iTrent web application interface. The browser address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=FA33F6058BE67C741944447DFB.... The page title is "Document attachment details - 1 x". The iTrent logo and the date "02/03/2023" are visible in the top left. The user is logged in as "(Manager Self Service - Electric)". The left sidebar shows the "University of Bath" organization and a search bar. The main content area is titled "Step 2 of 2" and "Chain: SDPR Chain". The "Document attachment details New" form is displayed with the following fields:

- Document*: SDPR Form 2022-23
- Document type*: SDPR+ (dropdown menu)
- Link: (empty field)
- Visible in Self Service: ☒
- Last updated date: (empty field)
- Last updated time: (empty field)
- Filename: (empty field)
- Select a file ...*: Choose File SDPR 2022-23.docx

A yellow arrow points to the "Save" button at the bottom right of the form.

- Once saved, click on the white arrow at the top right-hand side of the screen to finish the SDPR process chain. To go back to your MSS homepage click on the iTrent icon at the top left-hand side of the page.

The screenshot shows the iTrent web application interface. The browser address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=FA33F6058BE67C741944447DFB.... The page header includes the iTrent logo, the date 02/03/2023, and a user profile icon with the text "(Manager Self Service - Electric)".

The left sidebar contains navigation options: "SEARCH", "FIND ITRENT PAGES", "Organisation", "University of Bath", "People", and "Document attachments". The "Document attachments" section is expanded, showing "SDPR Form 2021-22" and "SDPR Form 2022-23".

The main content area displays the "Document attachment details" form for "SDPR Form 2022-23". The form is titled "Step 2 of 2" and "Chain: SDPR Chain". It includes the following fields and controls:

- Document***: Text input field containing "SDPR Form 2022-23".
- Document type***: Dropdown menu showing "SDPR+".
- Link**: Text input field.
- Visible in Self Service**: Checkmark icon.
- Last updated date**: Text input field containing "02/03/2023".
- Last updated time**: Text input field containing "12:43".
- Filename**: Text input field containing "SDPR 2022-23.docx".
- Replace by ...**: Text input field containing "Choose File" and "No file chosen".

At the bottom of the form are four buttons: "Download", "Save", "Delete", and "New". A yellow arrow points to a white arrow icon in the top right corner of the form area, indicating the next step in the process chain.