

# Professional Development on the iTrent Platform

Manager's Guidance



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## Introduction

## What is Professional Development?

Our employees, and their skills, knowledge, experience and talents are at the heart of our organisation, and we know that our staff are our most important and valuable asset. We could not achieve our vision and have a positive impact on our residents and customers without them.

It is therefore essential that time and space is allocated to focus on our employees and reflect on what has happened during the past year, what they have enjoyed, how they have displayed our One Council values, behaviours, what they want to do in the future, personal goals, aspirations and their professional development, as well as celebrating their achievements.

## My Sefton, My Space

My Sefton, My Space is Sefton Council's Performance Development Review (PDR) process. It is a key part of the opportunities our employees have to develop, grow and thrive in their role.

The My Sefton, My Space PDR process provides employees and you, their managers, with the time and space for a more in-depth and enhanced conversation about the previous 12 months, future aspirations, performance and development requirements for the following year.

The PDR process has also been simplified and no longer includes a 6-month review. Instead, actions agreed in a My Sefton, My Space meeting should be reviewed on a regular basis in one-to-one/supervision sessions, rather than once every 6 months.

### **Review Period**

The period for reviews runs September – August the following year, and always begins with the My Sefton, My Space review – the agreed objectives and goals are then reviewed during regular one-to-one sessions arranged with the employee.

## Professional Development Schedule

Stage & Activities	Timescales
1. Performance Development Review (My Sefton, My Space)	1st September –
Formal end of year review and My Sefton, My Place to take place between	30 <sup>th</sup> November
each year.	
<ul> <li>Identify achievements for the previous year</li> </ul>	
<ul> <li>Identify challenging tasks for the previous year</li> </ul>	
<ul> <li>Set objectives for the coming year</li> </ul>	
Identify training needs	
Discuss career aspirations/create development plan	
2. Training Needs Analysis	To be completed the
Complete and submit training needs analysis to the Workforce	first 2 weeks in
Development Team. Completion is mandatory for all service areas.	December each year.
<ul> <li>Review completed PDRs and identify future apprenticeship and</li> </ul>	
training requirements	
<ul> <li>Complete Training Needs Analysis on/before the required deadline</li> </ul>	
<ul> <li>Workforce Learning and Development Team creates council wide</li> </ul>	
annual training plan.	
3. Feedback, Supervision, Reward and Recognition	Every 4 – 6 weeks.
Capture additional priorities and review on-going progress of the	
employees PDR.	
Review PDR actions	
Investment in staff	
<ul> <li>Motivation and building trust</li> </ul>	
<ul> <li>Provide on-going feedback and give praise for any achievements</li> </ul>	
<ul> <li>Nominations for STAR and any internal service specific awards</li> </ul>	
<ul> <li>Nominations for sub-regional, regional and national awards</li> </ul>	

## Professional Development in iTrent

Starting from the 2024 review period, we are moving the 1<sup>st</sup> and 3<sup>rd</sup> stages of the Professional Development schedule into iTrent as a phased approach.

Starting from Monday 21<sup>st</sup> October 2024, you will be required to upload completed My Sefton, My Space PDF files to the electronic review and record any future one-to-one sessions utilising the new review functionality.

The system is designed to be as simple as possible, however there are some changes in terminology which will be described in this document.

### The Review Process

When you are ready to submit an employees completed My Sefton, My Space document, there are a number of steps that you need to complete in order to successfully upload the document to the Workforce & Development team.



Whilst developing the review system, we kept in mind the diverse family of employees that we have providing a broad range of services both internally and externally, we recognise that there is no singular solution that can encompass everyone. For this reason, we have developed multiple solutions for the different use cases that we have identified.

There are 3 different Reviews which are being implemented onto the iTrent platform:

- **Probation Reviews** All new starters are required to have monthly probation review meetings for the duration that the employee is on probation.
- **My Sefton, My Space** The My Sefton, My Space review has been uploaded to the iTrent platform allowing the Review to be completed online employees can complete their Review questions through Employee Self Service, and this can then be reviewed by the applicable line manager. For those employees who are unable to complete the My Sefton, My Space review online, we have created an offline version where line managers can upload the completed My Sefton, My Space PDF document.
- **Time to Talk** The formal 1:1/Social Care supervision review has also been uploaded to the iTrent platform. When completing a 1:1 or supervision review, managers can record notes to a structured series of questions. We have also created an offline version where line managers can upload completed 1:1/supervision meeting notes.

## **Objectives**

A new feature which is being introduced within iTrent is setting and reviewing personal objectives.

As part of the Professional Development framework, setting and reviewing objectives ensure that actions are recognised, recorded and maintained for any relevant goals or achievements that have been identified during the My Sefton, My Space and continuous 1:1/supervision reviews.

Only line managers can add/update objectives, however, employees can see details at any time by logging in to Employee Self Service.

Objectives follow a process of continuous review until the target has been achieved, or in rare cases, the objective has been abandoned.



## How-To

## Scheduling a review

In order to schedule a review, you will need to access Manager's Self Service (MSS).



From the homepage of MSS, on the right-hand side, select the new menu option titled My Staff





Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to review.



Once you have selected an employee, you will then be taken to their personal profile.

iTrent © 22/10/2024 ×			🔠 🗖 (Managers Self Service) 💩
Organisation	💿 Ro	man Bass	c
People     People     Persona Q      Q      Pesota Q      Persona Q      People Select all Save this group     Select all Save this group     Poman Bass	Personal Krown as Roman	Employment Demo Position Frontline   Magdalen House   Demo Unit 0:00 hours   Employee   Full time   Permanent Occupancy started on 01/01/2024 Proving margager Family Demo Position Manager Demo Position Manager	
Time Eden Clements			
Telix Fox	Calendar	22 Oct 2023 - 22 Oct 2024	
Treday Grey	VIEW FAIL CALENDAR     22 Oct - 04 Nov 2024     23 24 25 26 27 28 29 30 31 01 02 03 04	No sciences (as of last calculation)	
		INKS	
	Personal Information     Personal Information     Personal Information     Collective Overview	e > Time & Expenses V Reviews	



From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Review summary** – you will then be forwarded to a new window detailing the employee's review summary.

Trent							Managers Self Service)
SEARCH FIND ITRENT PAGES							
Organisation			💿 Eden Clements				
rganisation Structure	Review summary		V MENU C 🖶		Calendar		
∧ People :	Insights (Reviews in the l	ast 30 days)		2024 -	Today	< OCT >	
Persona v Q +	Completed	Scheduled	In Progress	LOCI			-
esuits 4 People elect all Save this group	○ 0	₽ 1	8 0	Sun Mon	Tue Wed Thu	Fri Sat	
) Roman Bass Eden Clements	Overdue 1	Due O	Abandoned		1 2 3	4 5	
Felix Fox		- ·		6 7	8 9 10	11 12	
Freddy Grey	Reviews		Filter: Scheduled     Sort: Date earliest	13 14	15 16 17	18 19	
	Eden Clements //	ama Bacitian Frantina)			10 10 17	10 19	
	Review name: My Se	fton, My Space 2024	Schedule review details	20 21	22 23 24	25 26	
	Between Eden Clement Scheduled on 10 Oct 20	s & Fatima O'Quinn 24 at 09:00	Review details	27 28	29 30 31		
	Location: Offline				+ Schedule a new review		
	No.						
S10							

Under the calendar on the right-hand side, click on the button titled Schedule a new review.

Calendar							
2024	•	Т	oday		<b>&lt;</b> 00	т	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31			
+ Schedule a new review							



You will now be forwarded to a screen where you are required to enter a number of details in order to schedule it.

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SEARCH FIND ITRENT PAGES		•		
Organisation     III	< Review summary	😳 Eden Clements		
Organisation Structure	Schedule review details New		c e	
People	Review name*	<b>```</b>		
Personav Q +	Position*	•		
Results 4 People Select all Save this group	Default reviewer			
🐼 Roman Bass	Override reviewer	0		
S Eden Gements	Due by date*	[]		
Telix Fox	Scheduled date*		<b></b>	
Treddy Grey	Scheduled start time*			
▲ Scheduled reviews	Scheduled end time			
(Scheduled V) Q	Location *			
	Review status			
		Save		

- Review name select the applicable review from the drop-down menu (mandatory)
- Position select the position that the review is pertinent to (mandatory)
- Default reviewer this will automatically update to the employee's line manager
- **Override reviewer** tick this box to select another employee who will complete the review for the employee this will change the reviewer. For example, the line manager is on annual leave.
- **Due by date** this is the date by which the review is due. For My Sefton, My Space, this is typically 30<sup>th</sup> November of the corresponding year (mandatory)
- Scheduled date this is the date that the review is scheduled on a one-to-one basis with the employee (mandatory)
- Scheduled start time this is the time that the one-to-one meeting will take place on the above date (mandatory)
- Scheduled end time this is the time that the one-to-one meeting will conclude on the above date (mandatory)
- Location this is the location where the one-to-one meeting will be held for online meetings, enter Microsoft Teams, however, you must schedule this separately (mandatory)
- **Review status** this is a read-only field which will update to show the current status of the review



< Review summary	🔂 Eden Clements	
Schedule review details New		c 🖶
Review name*	My Sefton My Space (office ba 🗸	
Position*	Demo Position Frontline	
Default reviewer	Fatima O'Quinn	
Override reviewer		
Due by date*	30/11/2024	
Scheduled date*	24/10/2024	
Scheduled start time*	10:00	
Scheduled end time	11:00	
Location *	Microsoft Teams	
Review status		
	Save	

Once you click **Save**, the review will be scheduled, and a confirmation email will be sent to the employee.

## Rescheduling/Amending a Review

In order to reschedule or amend a review, you will need to access Manager's Self Service (MSS).



From the homepage of MSS, on the right-hand side, select the new menu option titled My Staff

	t↓
My Staff	>
My Structure	>
My Tasks	>
Management Information	>
Downloads	>
Support	>



Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to review.



Once you have selected an employee, you will then be taken to their personal profile.





From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Review summary** – you will then be forwarded to a new window detailing the employee's review summary.

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SEARCH FIND ITRENT PAGES			
Organisation		💿 Eden Clements	
Organisation Structure	Review summary	🗸 menu C 🖨	Calendar
People	Insights (Reviews in the last 30 days)		2024 - Today < OCT >
(Persona v) Q + Results 4 People Select all Save this group	Completed Scheduled ⇒ 1		Sun Mon Tue Wed Thu Fri Sat
💿 Roman Bass	Overdue Due	Abandoned	
Con Eden Clements	<u>▲ 1</u> <u>0</u> 0	× 0	1 2 3 4 5
<ul> <li>Freddy Grey</li> </ul>			6 7 8 9 10 11 12
	Reviews Fil	:er: Scheduled 🔻 Sort: Date earliest 👻	13 14 15 16 17 18 19
	Come Clements (Demo Position Frontline) Review name: My Sefton, My Space 2024	Schedule review details	20 21 22 23 24 25 26
	Between Eden Clements & Fatima O'Quinn Scheduled on 10 Oct 2024 at 09:00	Review details	27 28 29 30 31
	Location: Offline		+ Schedule a new review
1.4			

On the **Review Summary** screen, you can see an overview of the employee's reviews. Use the **Filter** option to view reviews which have a different status – such as "*Overdue*", alternatively, using the calendar, on the right-hand side to view reviews planned for that date.

🔂 Eden Clements									
Review summary		🗸 MENU 🧷 🖨			(	Calenda	ır		
Insights (Reviews in the last 30 da	ys)		2024	•	Т	Today		<b>&lt;</b> 00	T <b>&gt;</b>
Completed 0	Scheduled 1	In Progress O	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Overdue 1	Due 0	Abandoned			1	2	3	4	5
			6	7	8	9	10	11	12
Reviews		Filter: Scheduled 🔻 Sort: Date earliest 👻	13	14	15	16	17	18	19
Eden Clements (Demo Position Review name: My Sefton, My Sp	n Frontline) pace 2024	Schedule review details	20	21	22	23	24	25	26
Between Eden Clements & Fatima ( Scheduled on 10 Oct 2024 at 09:00	D'Quinn	Review details	27	28	29	30	31		
Location: Offline					+ Sch	iedule a n	ew reviev	~	



#### Once you have located the review, click on the **Schedule review details** button.

Eden Clements												
Review summary	•			C	Calenda	r						
Insights (Reviews in the last 30 day	/s)					2024	•	Т	oday		<b>&lt;</b> 00	т >
Completed 0	Sched ₽⊐ 1	uled	8	In Progress O		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Overdue 1		e	Ŕ	Abandoned O				1	2	3	4	5
						6	7	8	9	10	11	12
Reviews		Filter	r: Scheduled	<ul> <li>Sort: Date earliest</li> </ul>	•	13	14	15	16	17	18	19
Eden Clements (Demo Position Review name: My Sefton, My Sp	Frontline) ace 2024		(	Schedule review details		20	21	22	23	24	25	26
Between Eden Clements & Fatima C Scheduled on 10 Oct 2024 at 09:00	)'Quinn		(	Review details		27	28	29	30	31		
Location: Offline								+ Sch	edule a n	ew reviev		

From the **Schedule review details** screen, you can update different options of the scheduled review, including: -

- **Review name** select the applicable review from the drop-down menu (mandatory)
- **Position** select the position that the review is pertinent to (mandatory)
- **Override reviewer** tick this box to select another employee who will complete the review for the employee this will change the reviewer. For example, the line manager is on annual leave.
- **Due by date** this is the date by which the review is due. For My Sefton, My Space, this is typically 30<sup>th</sup> November of the corresponding year (mandatory)
- Scheduled date this is the date that the review is scheduled on a one-to-one basis with the employee (mandatory)
- Scheduled start time this is the time that the one-to-one meeting will take place on the above date (mandatory)
- Scheduled end time this is the time that the one-to-one meeting will conclude on the above date (mandatory)
- Location this is the location where the one-to-one meeting will be held for online meetings, enter Microsoft Teams, however, you must schedule this separately (mandatory)

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SEARCH ENDITRENT PAGES	< Review summary	💿 Eden Clements		
Organisation Structure	Schedule review details Eden G	ements	c e	
People	Review name*	My Sefton, My Space 2024	•	
(Persona v) Q, +	Position*	Demo Position Frontline	•	
Results 4 People Select all Save this group	Default reviewer	Fatima O'Quinn	)	
The Roman Bass	Override reviewer			
S Eden Clements	Due by date *	30/11/2024		
Telix Fax	Scheduled date*	11/10/2024		
🗇 Freddy Grey	Scheduled start time*	09:00	)	
Scheduled reviews	Scheduled end time	(		
(Scheduled V) Q	Location *	Offline	)	
My Selton, My Space 2024	Review status	Scheduled	)	
		Save New		



Update the necessary details of the review as required, then click **Save** to submit the changes. An email will automatically be dispatched to the employee advising them of the change.

< Review summary	💿 Eden Clements	
Schedule review details Eden Cle	ments	C 🖨
Review name *	My Sefton, My Space 2024 🔹 🗸	
Position *	Demo Position Frontline	)
Default reviewer	Fatima O'Quinn	)
Override reviewer		
Due by date*	30/11/2024	) 🖻
Scheduled date *	11/10/2024	<b>—</b>
Scheduled start time*	09:00	)
Scheduled end time		)
Location*	Offline	)
Review status	Scheduled	)
	Save New	

## Conducting a Review

Depending on the review type, there sometimes 2 different contexts setup for that review – the Reviewee (Employee) and the Reviewer (Employee's line manager). The relationship of Reviewee:Reviewer is sourced from the current organisational structure hosted within iTrent.

This guidance only covers completing a review from the context of the Reviewer (Employee's line manager).

In order to conduct a review, you will need to access Manager's Self Service (MSS).

EQ MENU			(Managers Self Sen)	ice) 🔂
	Good morning Fatima, welcome back! You las	t logged in 2 days ago	Q Find Trent pages	t↓ ≻
	Downtime - Scheduled Maintenance 2024 - Clic	rover n 'How t	Workflow Redirections	> >
	• My to do list (0) / Processes (0)	• (2) Nobody is out of the office today		
	Reviews	Report dashboards		

From the homepage of MSS, on the right-hand side, select the new menu option titled My Staff

	tĻ
My Staff	>
My Structure	>
My Tasks	>
Management Information	>
Downloads	>
Support	>



Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to review.



Once you have selected an employee, you will then be taken to their personal profile.

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Organisation	💿 Ro	man Bass	C
People     Peosona     Pe	Personal Known as Roman	Employment Demo Position Frontline   Magdalen House   Demo Unit 000 hours   Employee   Full time   Permanent Occupancy started on 01/01/2024 Propring manager Propring Manager Demo Position Manager	
Teden Clements			
Telix Fox	Calendar	22 Oct 2023 - 22 Oct 2024	
C Freddy Grey	WEW FULL CALENDAR      22 Oct - 04 Nov 2024  2 23 24 25 26 27 28 29 30 31 01 02 03 04	No sickness (as of last calculation)	
		INKS	
	Personal Information     Employment     Absence     Review Summary     Objective Overview	e > Time & Expenses V Reviews	



From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Review summary** – you will then be forwarded to a new window detailing the employee's review summary.

iTrent 14/10/2024 ×			(Managers Self Service) Self Service
SEARCH FIND ITRENT PAGES			
Organisation		🔄 Eden Clements	
Organisation Structure	Review summary	V MENU C 🖶	Calendar
▲ People :	Insights (Reviews in the last 30 days)		2024 • Today
Personav Q +	Completed Scheduled	In Progress	
Select all Save this group	O ≠ 1	<u>× 0</u>	Sun Mon Tue Wed Thu Fri Sat
Concerning Research R	Overdue Due	Abandoned	1 2 3 4 5
🔂 Felix Fox		, <u> </u>	6 7 8 9 10 11 12
Treddy Grey	Reviews Filte	r: Scheduled 👻 Sort: Date earliest 👻	13 14 15 16 17 18 19
	Eden Clements (Demo Position Frontline) Review name: My Sefton, My Space 2024	Schedule review details	20 21 22 23 24 25 26
	Between Eden Clements & Fatima O'Quinn Scheduled on 10 Oct 2024 at 09:00 Location: Offline	( Review details	27 28 29 30 31
			+ Schedule a new review
144			

On the **Review Summary** screen, you can see an overview of the employee's reviews. Use the **Filter** option to view reviews which have a different status – such as "*Overdue*", alternatively, using the calendar, on the right-hand side to view reviews planned for that date.

		🔂 Eden Clements							
Review summary		🗸 MENU C 🖨			(	Calenda	ır		
Insights (Reviews in the last 30 da	ys)		2024	•	Т	oday		<b>&lt;</b> 00	т >
Completed 0	Scheduled	In Progress 0	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Overdue 1	Due O	Abandoned			1	2	3	4	5
			6	7	8	9	10	11	12
Reviews		Filter: Scheduled 🝷 Sort: Date earliest 🝷	13	14	15	16	17	18	19
Eden Clements (Demo Position Review name: My Sefton, My Sp	n Frontline) Dace 2024	Schedule review details	20	21	22	23	24	25	26
Between Eden Clements & Fatima ( Scheduled on 10 Oct 2024 at 09:00	O'Quinn	Review details	27	28	29	30	31		
Location: Offline					+ Sch	edule a n	ew reviev	N	

Once you have located the review, click on the **Review details** button – you will be then forwarded to complete the review.

### **Further Information**

Review forms are typically comprised of a number of talking points. The requested input is either text, defined input through a dropdown list or radio button, or date input. Where enabled, there is also opportunity to upload files by attaching them to the review.

Keview summary	💿 Freddy Grey
Review details Freddy Grey	0 🗗 S (S
My Sefton My Space (office base 16 October 2024 at 10:00 Between Freddy Grey & Fatima O'Quin Position: Demo Position Frontline Location: Room 2.3, Magdalen House Status: Scheduled	ed) n
Narrative Sefton Council	Î
Introduction My Sefton, My Space is a key part o My Space meetings should be held one/supervision meetings.	f the opportunities you have to develop, grow and thrive. <i>My Sefton,</i> at least once a year and complement your regular one-to-
Talking points	^
SECTION 1	0

Found at the beginning of the review is the **Narrative** – this outlays the review purpose including any necessary information, introductions or reference points.



Talking points	^
SECTION 1	Ð
My Reflections	Ð
My Highlights	
Thinking about the last year, what are the three things you are most proud of and why?	
Three proudest achievements	
Add response here	

Scrolling down the page, found just under the **Narrative**, you will see the title for **Talking Points**; this is where all review questions are located.

If you do not see any **Talking Points** visible, check to make sure that the panel has not been collapsed by clicking on the arrow located adjacent to the right of the **Talking Points** title.



Where enabled, **Help Text** may have been setup for a question. In this **Help Text**, further information, clarification or links to resources may be included to help answer the **Talking Point** question. To view the **Help Text** for the question, click on the **1** symbol.

SECTION 1	SECTION 1 Close X
My Reflections	Before your My Sefton, My Space meeting you should spend some time familiarising yourself with this electronic form and use the My Sefton, My Space employee preparation guide, to
My Highlights	help you to complete section 1. The link to access can be found in the above Narrative section
Thinking about the last year, what are the three things you are most proud of and why?	

Some questions within a review may be mandatory – this means that they must be answered before the review can be submitted. Mandatory questions are prefaced with an asterisk (\*)



**IMPORTANT:** Whilst completing the review, it is important that you **Save** your progress throughout the review. Failing to do so could result in answers not being committed and any progress lost. Found at the bottom of the screen, on the right-hand side is a small button with a save icon – clicking this at regular intervals will ensure that progress is saved without having to lose your position within the form.

Following completion of your <i>My Sefton, My Space</i> , your mana discussions and send you a copy for your approval and sign of then be owned by you and it will be your responsibility to brin one/supervision meetings and ensure any actions are reviewe	ager will type up the notes fro ff. The <i>My Sefton, My Space</i> o g it along to your regular one ed.	om your document will e-to-
Please click on the link for further guidance on how to comple	te your review.	
Falking points		^
SECTION 1	$\mathbf{X}$	۲
My Reflections		0
My Highlights		
Thinking about the last year, what are the three things you are mo	st proud of and why?	
Three proudest achievements		
Add response here		
		G

## Adding Attachments

Some reviews may have a requirement to upload files – this can be completed using the **Attachments** function.

In order to add an attachment(s) to a review, you will need to be on the **Review details** screen for the applicable review.

On the top of the review interface, you will see a paperclip icon.

< Review summary	💿 Eden Clements	
Review details Eden Clements		<u> </u>
My Sefton, My Space 2024 11 October 2024 at 9:00 Between Eden Clements & Felix Fox Position: Demo Position Frontline Location: Offline		

Clicking on this icon, will show a small context menu with a single option – **Document attachments**. Click this option to be forwarded to the next screen.

<ul> <li>Review summary</li> </ul>	💿 Eden Clements	
Review details Eden Clements		? C 🖶 🕦
My Sefton, My Space 2024 11 October 2024 at 9:00		Document attachments



< Review details	💿 Eden Clements
Document attachment details	New ? C 🖶
Document*	
Document type	✓
Link	
Visible in Self Service	0
Last updated date	
Last updated time	
Filename	
Select a file*	Choose File No file chosen
	Save

On the **Document attachment details** screen, you are required to complete a number of fields.

Document: Give the document a title (mandatory)

Document type: Select the document type that you are uploading

**Link:** Clicking this link will allow you to provide a link to the file, as opposed to uploading the file direct to iTrent (not recommended)

Visible in Self Service: If you want to allow the employee to see the attachment, tick this box

Last updated date: A read-only field showing the date the document was last modified

Last updated time: A read-only field showing the time the document was last modified

**Select a file**: Clicking this button will open up a small dialog box allowing you to navigate your machine to select the file you wish to upload

Once you have selected and uploaded your file, click on **Save** to commit the file to the review.

< Review details	<ul> <li>Eden Clements</li> <li>Changes have been saved.</li> </ul>	
Document attachment details	My Sefton, My Space 2024	0 C 🖶
Document*	My Sefton, My Space 2024	
Document type	My Sefton, My Space Review 🖌	
Link		
Visible in Self Service		
Last updated date	22/10/2024	
Last updated time	12:05	
Filename	Clemnts, Eden - Completed PDR.pdf	
Replace by	Choose File No file chosen	
Downl	oad Save New	

Once the screen has refreshed, click on the **Review details** text link to return back to the review.

Sefton Council 불



### **Setting Objectives**

In order to set objectives, you will need to access Manager's Self Service (MSS).



From the homepage of MSS, on the right-hand side, select the new menu option titled My Staff

	t↓
My Staff	>
My Structure	>
My Tasks	>
Management Information	>
Downloads	>
Support	>



Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to set objectives.



Once you have selected an employee, you will then be taken to their personal profile.

Organisation		A Doman Dage	0	(wanges ser server)
Organisation Structure		O Norman bass	C	
People  Persona  Cersona  Cer	Personal Krown as Roman	Employment Demo Position Frontline   Magdalen Hou 0:00 nours   Employee   Fuil time   Permu Occupany started on 01/01/2024 Percong munger Fatima OQuinn Demo Position Manager	ise   Demo Unit anent	
😳 Eden Clements				
Telix Fax	Calendar	22 0++ 2023 - 22 0++ 2	0024	
Treddy Grey	VIEW FULL CALENDAR     22 Oct - 04 Nov 2024     23 24 25 26 27 28 29 30 31	01 02 03 04 No schees (as of last calculated	n)	
		LINKS.		
	Personal Information     Personal Informa	nt > Absence > Time & Expenses very	EWS	

From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Objective overview**– you will then be forwarded to a new window, where you will be prompted for the date. Either enter the current date via the date picker or press the letter T on your keyboard to enter the current date automatically, then click **OK**.

	💿 Freddy Grey			
Objective overview (as of 15/10/2024)		✓ MENU C	•	Û
Position <all></all>				Ŧ
	No objectives found			

To add a new Objective for an employee, click on the **Add objective** button – you will be forwarded to the **Objective details** screen.

< Objective overview	💿 Freddy Grey		Objective details help Close X
Objective details New		?	Objective Title
Objective title*		)	What do I want to achieve?
Туре*	Personal		Description How will I do it?
			When will Lachieve this by?
Attachment date*	15/10/2024	) 🖽	Start Date/Completion Date
Description			These are to be completed when the employee actually starts and/or completes the objective <b>Position</b>
Additional information			If the objective is pertinent to a position, select it from the dropdown list as appropriate. If the objective is employee-based, choose " <all>" For further information, consult the <u>My Sefton, My Space Employee</u> <u>Preparation Guide</u></all>
Target start date		) 🖽	
Target completion date			
Start date		) 🗃	
Completion date			
Position	<ali></ali>	)	
	Save		

An initial Help Text box will be displayed, which details what each field means – to close this, click on the **Close X** link in the upper right corner; to re-display, click on the question mark found adjacent to the Objective details title.





✔ Objective overview	💿 Freddy Grey	
Objective details Obtain First Aid qu	alification	0 c 🖶 🛛
Personal objective	Yes	
Objective title*	Obtain First Aid qualification	)
Туре*	Personal	
Attachment date*	15/10/2024	<b>—</b>
Description	Due to an identified shortage of first aid trained personnel in the department, Freddy has indicated	
Additional information	Freddy has signed up to a First Aid training course through the Corporate Learning Centre, which is a 3-	
Target start date	06/01/2025	<b>—</b>
Target completion date	08/01/2025	<b>—</b>
Start date		<b>—</b>
Completion date		<b></b>
Position	Demo Position Frontline	)
	Save New	

Enter the initial Objective details, then click **Save** to create the Objective.

Click on the **Objective overview** text link found to the left of the employee's name to go back to the Objective overview screen.



			💿 Freddy Grey	ý			
Objective overview (as of 15/10/2024)						~ 1	MENU C 🗗 🛛
Position <aii> •</aii>	+ Add objectiv	re					⊽ Filter ∽ 💻
Title 🕈	Туре 🕈	Status 🗢	Start date 🗢	Completion date 🗘	Objective linked to 🗘	Actions 🗘	
> Obtain First Aid qualification	Personal	Not started	06/01/2025 (Target)	08/01/2025 (Target)	Obtain First Aid qualification	0	-

## **Updating Objectives**

In order to update Objectives, you will need to access Manager's Self Service (MSS).



From the homepage of MSS, on the right-hand side, select the new menu option titled My Staff

	t↓
My Staff	>
My Structure	>
My Tasks	>
Management Information	>
Downloads	>
Support	>



Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to set Objectives.



#### Once you have selected an employee, you will then be taken to their personal profile.

^ People     Errisona     Q +     Recute A People     Select all     Save this group     Orman Bass     Orman Bass     Orman Bass	Personal Known as Roman	Employment Demo Position Frontline   Magdalen House   Demo Unit 0.00 hours   Employee   Full time   Permanent Occupancy started on 01/01/2024 Com Reform gravager Fatima O'Quinn Demo Position Manager	
Control Cententials  Felix Fox  Freddy Grey	Calendar	22 Oct 2023 - 22 Oct 2024	
	Personal information     Employment     Absent     Composition     Composition	te Time & Expenses Reviews	

From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Objective overview**– you will then be forwarded to a new window, where you will be prompted for the date. Either enter the current date via the date picker or press the letter T on your keyboard to enter the current date automatically, then click **OK**.

			💿 Freddy Grey	y			
Objective overview (as of 15/10/2024)						~ 1	MENU C 🖶 🛛
Position <ai></ai>	+ Add objecti	ve					Ƴ Filter ∽ 👲
Title 🕈	Туре 🗢	Status 🗢	Start date 🗢	Completion date 🗢	Objective linked to 🗢	Actions 🗢	
> Obtain First Aid qualification	Personal	Not started	06/01/2025 (Target)	08/01/2025 (Target)	Obtain First Aid qualification	0	

To update an Objective: from the list of recorded Objectives, click on the Objective title to be forwarded to the Objective details screen.



Update Objective details as necessary, then click **Save** to update.

Click on the **Objective overview** text link found to the left of the employee's name to go back to the Objective overview screen.



