

Online PDR and Probation System

User Guide

Table of Contents

How to login for the first time	2
Tabs	2
My linked people.....	3
Actions	4
Settings	5
Support	5
Logging in	6
Setting the meeting date.....	6
Filling out the form	7
Sharing the Review form.....	7
Finalising the form.....	7
Finalised and Archived Review forms	8
Notes.....	9
How to add a note.....	9
Reports.....	12
Usage Report	12
Usage report features and useful tips	12
Privacy FAQs.....	14
Review Terminology	15

How to login for the first time

Follow the simple steps below to find out how to login for the first time.



An email will be sent containing a link to the site, click on the link and input your single sign on details. This should give you access to the site, this will take you to the Me Page.

Tabs

The **Me** page works as a home page and can be used to navigate to all aspects of the site. This can include:

- **My Linked People** - Visible only to Reviewers and Line Managers.
- **Actions** - Visible to every user, this page notifies users of any actions that require an update/approval.
- **Reports** - Visible to Line Managers.
- **Settings** – Visible to every user. Administrators will have access to further features.
- **System Support** – All users can log queries via this link
- **Logout** - enables users to log out from their account

Me
My Linked People
1 Action
[Reports](#) [Settings](#)



Test Reviewer

Name

Test Reviewer

Job roles

[Academic Clinical Lecturer in Paediatrics](#)

Workgroup

[University of Oxford](#)

[View notifications](#)



My Reviews

My Reviews

Review Title	Review Period	Reviewer(s)	Action
Paediatrics Review 2017	14/06/2017 to 14/06/2018	Test Reviewee	You have not started this review
Paediatrics Probation Review 2017	16/06/2017 to 16/06/2018	Test Reviewee	You have not started this review

My Notes [View finalised reviews](#)



Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your reviews.

[View my notes](#)

My linked people

Me
My Linked People
1 Action
[Reports](#) [Settings](#)



My Linked People



My Linked People

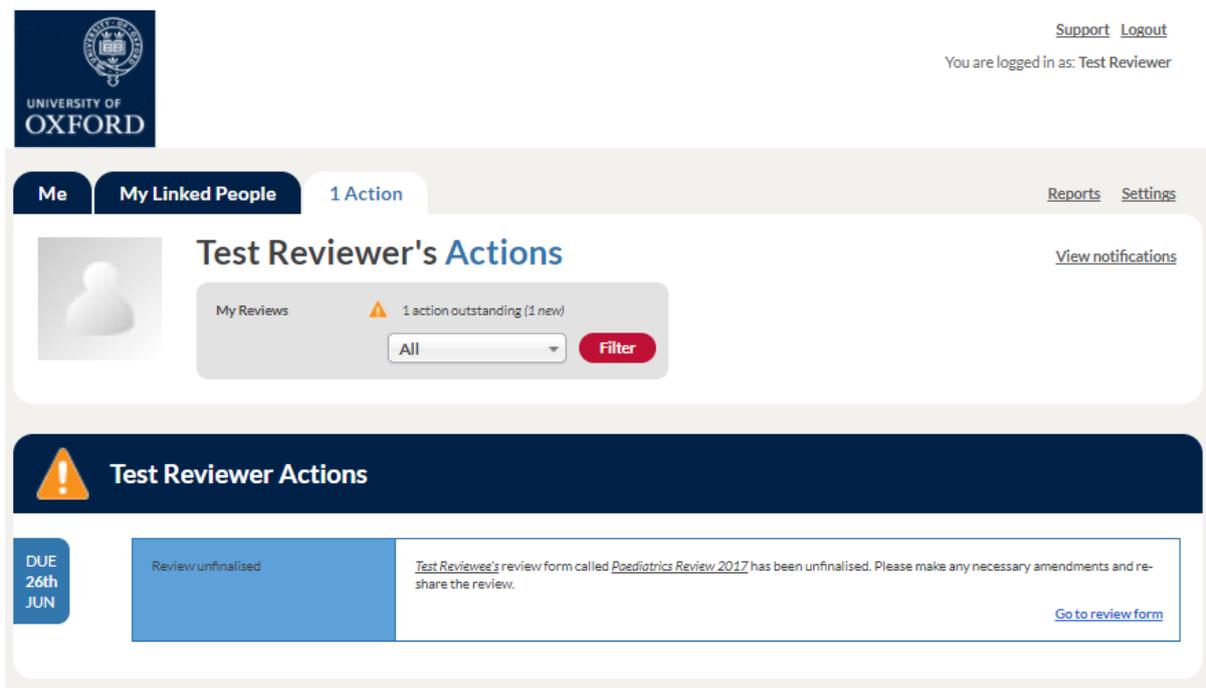
Name	Job Role	Review status	People whose reviews I manage	Actions
Devinder Whelan	Clinical Project Manager	Not started	0 actions	
Test Reviewee	Academic Clinical Lecturer in Paediatrics	Shared (The reviewee has shared changes with you)	0 actions	⚠
Will Test	Administrative Assistant	Not started	0 actions	

This section shows Reviewers and Line Managers, a list of their **Linked People**. If you are a Reviewer, click on any of your Reviewees' name to access their **Me** page and to view their progress and notes.

- **Users whose 'Reviews' I manage** - This section displays the user's Review progress and whether they have any outstanding actions in relation to their Review form.
- **Actions** - This section displays an orange triangle if there is an outstanding action for the Reviewer in relation to a specific person they manage.

Actions

The **Actions** page displays any outstanding actions that you need to complete. These can be the need to view comments on a form or approve a meeting date. If the actions are not completed, a digest email will be generated. This is only generated for as long as the actions are outstanding. Once completed, actions will no longer appear in the email, but any new actions will.

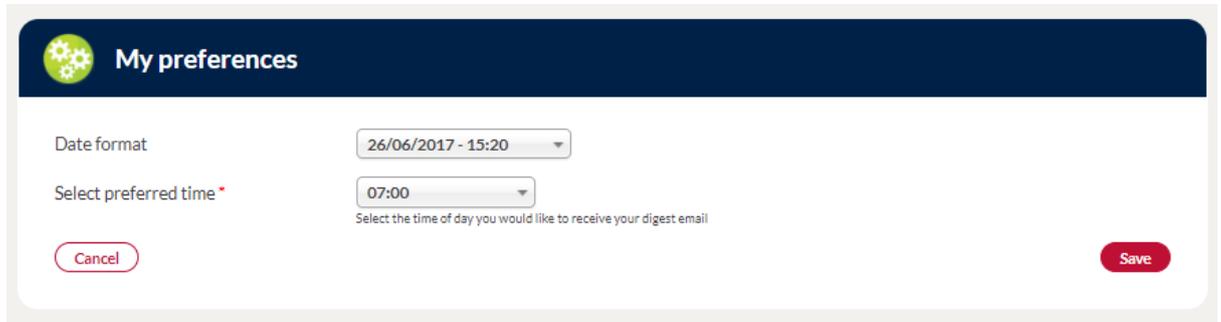


The screenshot displays the Simitive interface for a Test Reviewer. At the top left is the University of Oxford logo. On the right, it says 'Support Logout' and 'You are logged in as: Test Reviewer'. The main navigation bar includes 'Me', 'My Linked People', and '1 Action'. Below this, there's a section for 'Test Reviewer's Actions' with a notification for '1 action outstanding (1 new)'. A table below shows a notification for 'Review unfinalised' with a due date of 'DUE 26th JUN' and a link to 'Go to review form'.

Notifications can be viewed from either the **Actions** page or the **Me** Page. Unlike actions, which require something to be completed in order to progress, notifications highlight any relevant changes that have been made in the system that relate to your Review form or notes.

Settings

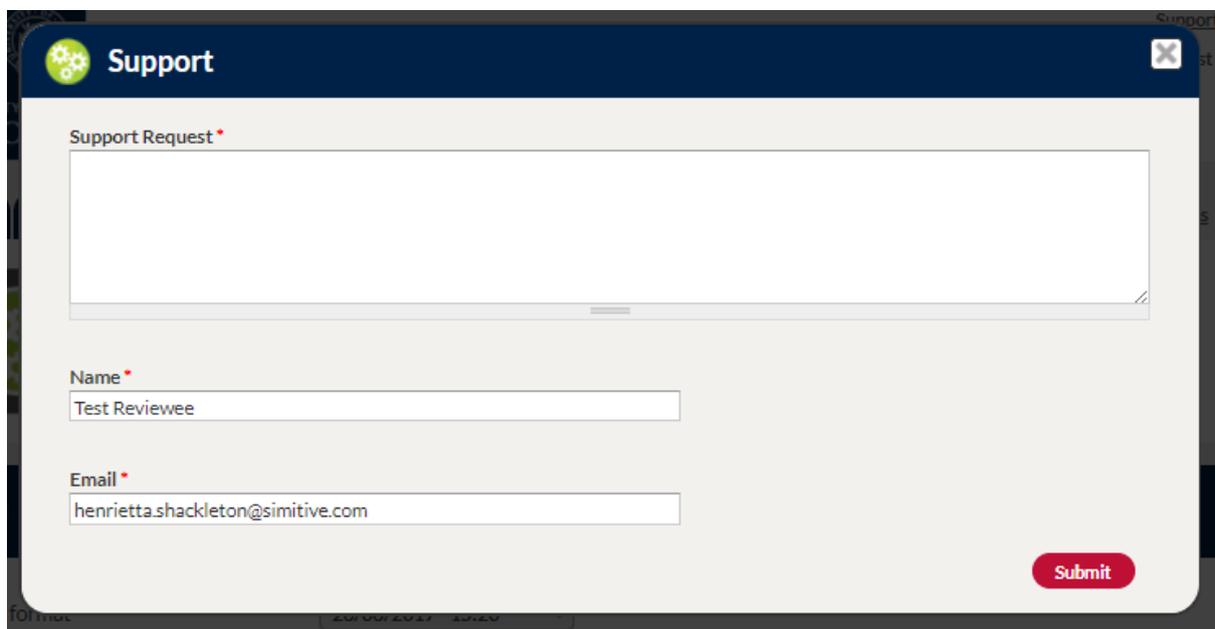
- Update your preferences, which includes:
 - Changing the date format
 - Selecting the time of day that you would like to receive your digest email



Settings page > My preferences

Support

Should you have any queries or issues using the system, please click on the **Support** link at the top right of the page. The query will be sent to a dedicated university support team which will assist you with this issue.

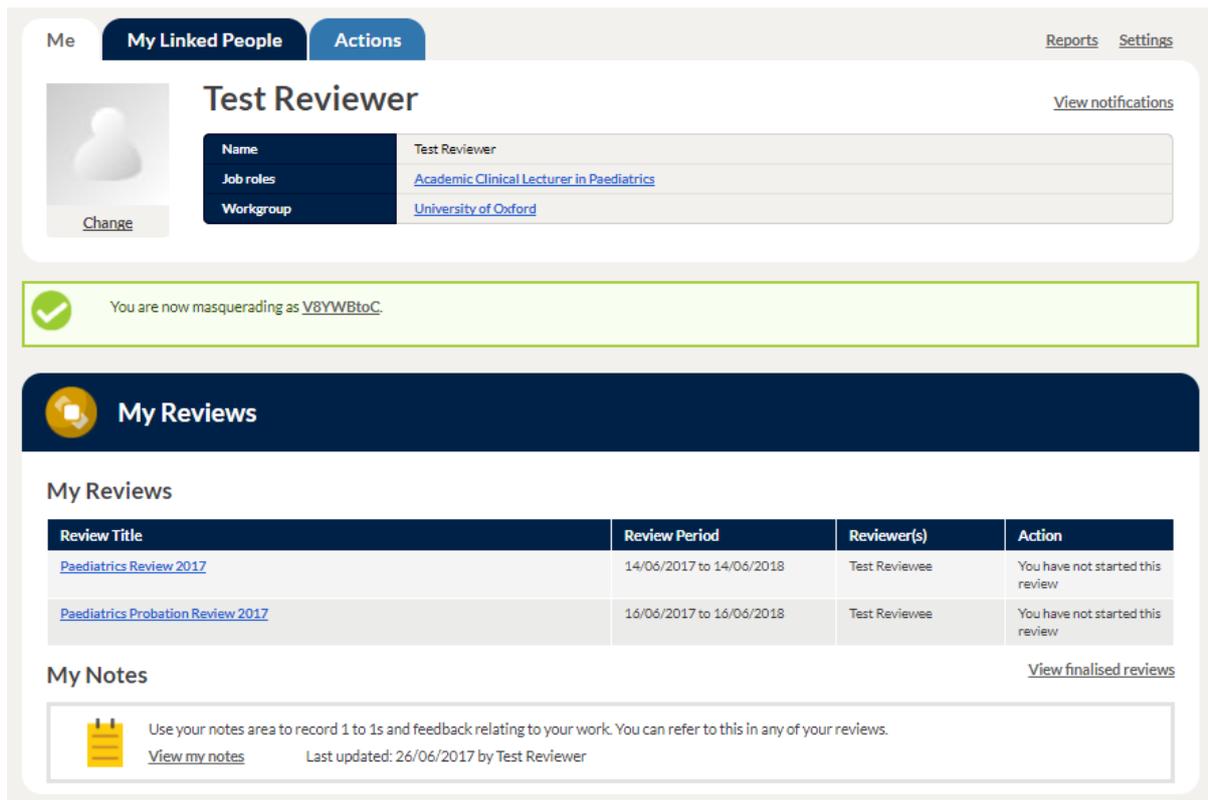


Me page/ Actions page > Support

My Review module

Logging in

On your **Me** page, scroll down to find the **Review** section and click on the form that has been allocated.



The screenshot shows the 'Me' page with tabs for 'My Linked People' and 'Actions'. The user profile is for 'Test Reviewer', an Academic Clinical Lecturer in Paediatrics at the University of Oxford. A notification indicates the user is masquerading as 'V8YWbtoC'. The 'My Reviews' section contains a table with the following data:

Review Title	Review Period	Reviewer(s)	Action
Paediatrics Review 2017	14/06/2017 to 14/06/2018	Test Reviewee	You have not started this review
Paediatrics Probation Review 2017	16/06/2017 to 16/06/2018	Test Reviewee	You have not started this review

Below the table is a 'My Notes' section with a 'View my notes' link and a note about recording 1 to 1s and feedback.

Me Page > Review form

Setting the meeting date

The Reviewee is responsible for initiating the Review meeting, once the date has been set it will be sent for agreement to the Reviewer. Setting the meeting date will turn the first box yellow - this means the date suggested has been sent to the Reviewer for approval.

<p>Meeting date</p> <p>A meeting date is required in order to discuss and agree your review. Once you have set the date, it will be sent for agreement.</p> <p>Set date</p>	<p>Commenters</p> <p>Add people who should see/comment on your review once it has been finalised, or skip if this is not required.</p> <p>Add or Skip</p>	<p>Share</p> <p>Once you have completed the form below, click here to share your content with your reviewer.</p> <p>Share and close</p>
--	--	--

Filling out the form

Follow the instructions on the form to complete it. The auto-save function will save every half a second after typing anything in the form. Click **Save** or **Save & Close** and come back later to continue filling it out. Save and close will save any changes and close the form, returning to the Me page.

Sharing the Review form

The content written will only be visible to the Reviewer upon clicking **Share and Close**. Once the form has been shared the third box will turn green. If any changes are made to the form the box will turn yellow, quickly indicating whether or not the latest changes have been shared.

<p>Meeting date</p> <hr/> <p>Once you have set the date, it will be sent for agreement.</p> <p>Set date</p>	<p>Share</p> <p>You have made changes since you last shared this form. To allow your Appraiser to view these changes, please click share and close again</p> <p>Share and close</p>
---	---

Any fields which have been changed since the last share will have the following symbol next to the view history link.

<p>Reviewee text</p> <hr/> <p>This is a test of the exclamation mark denoting a change to the shared contents of this field.</p> <p style="text-align: right;"> View history</p>

Finalising the form

Once all changes have been shared and all boxes are green, you will be able to finalise the Review form.

Me My Linked People 1 Action Reports Settings

Test Reviewee's review

Name Paediatrics Review 2017
 Review period 14/06/2017 to 14/06/2018
 Reviewer(s) Test Reviewer

[Go to print-friendly page](#)
[Save as a print-friendly PDF](#)
[Add attachment](#)

Meeting date

24/06/2017

[Change meeting date](#)

Commenters

No commenters

[I've changed my mind](#)

Share

You have shared this form with your reviewer. You can still edit content below, but will need to share any further changes.

[Finalise](#)

The review has not been submitted for finalisation. Clicking finalise will ask the form owner and reviewer to agree to all the content. You will not be able to edit content once it has been finalised.

Finalised and Archived Review forms

On the **Me** page, under the Review section click on **View finalised Reviews** button to view finalised Review forms from previous years.

My Reviews

My Reviews

Review Title	Review Period	Reviewer(s)	Action
Paediatrics Review 2017	14/06/2017 to 14/06/2018	Test Reviewer	Awaiting reviewer for finalisation
Paediatrics Probation Review 2017	16/06/2017 to 16/06/2018	Test Reviewer	You have shared changes with the reviewer

My Notes

Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your reviews.
[View my notes](#)

[View finalised reviews](#)

These Review forms are locked and can no longer be edited by you or your Reviewer. They will be visible to all parties involved for future reference.

On the Review Section on your Me page you are able to view the current status of your Review form. Please find example shown below.

Notes

Whilst the main focus of your interactions with your manager will focus on your Review, it is important that you both are able to record more general notes relating to progress. Examples of these include recording notes meetings, personal documentation relating to aspects of your work or uploading a certificate or diploma. Equally, managers may wish to record or share notes with you relating to your work.

You can keep notes private (the default behaviour) or share them with your manager / Reviewer.

How to add a note

1. On the **Me** Page, under the **Notes** section, click **Add note**.
2. Complete each section. Each note will consist of:
 - Note title
 - Description
 - Option to share
3. Attach supporting documents by clicking **Add files** and selecting the required file(s) - or dragging them into the attachment field - then clicking **Start upload**, files can be uploaded from either Google Drive or the local drive.
4. You can **Cancel** to exit without saving your note, or **Save**. If you close the pop-up or navigate away, it will not save the note.

*The default behaviour is for the note to be private and only visible to supervisors if shared. Supervisors can also create and share a note with you which will appear on your **Me** page **My Notes** section.

New note

Note title

Description ^{*}

B *I* U

- ☰
- ☰

This note is currently private. Select users in the list below if you wish to share.

Share with: Test Reviewer

Local files Google Drive

Add attachments

Filename	Size	Status
Drag files here.		
+ Add files	0 b	0%

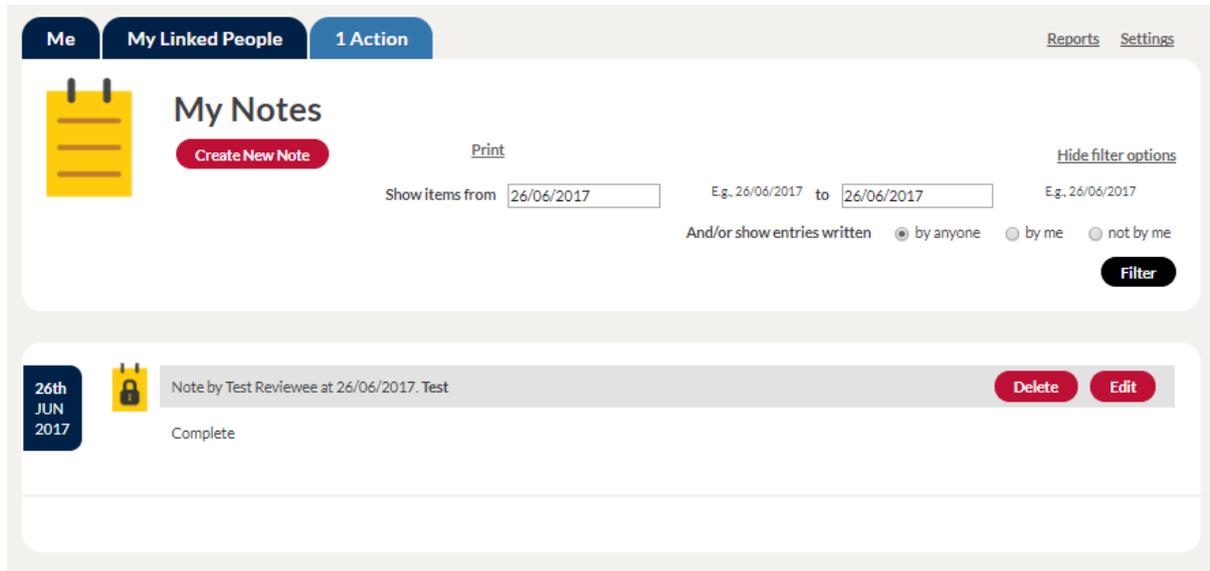
Allowed file types: jpg jpeg gif png txt doc docx xls xlsx pdf ppt pptx pps odt ods odp msg zip.

[Cancel](#) Please complete the description field before saving your note

Me Page > My Notes > View my notes > Create New Note

Filter notes

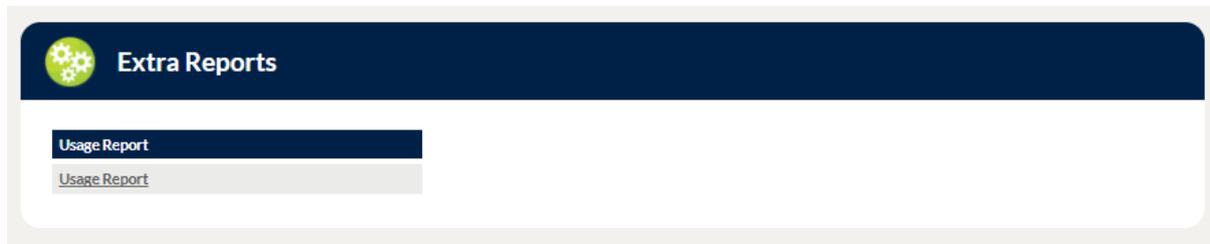
On the **Notes** page, you will have the ability to filter through these by date and by the user who wrote the note.



The screenshot displays the 'My Notes' interface. At the top, there are navigation tabs for 'Me', 'My Linked People', and '1 Action', along with links for 'Reports' and 'Settings'. The main heading is 'My Notes' with a 'Create New Note' button. Below this, there are filter controls: 'Show items from' with a date input field containing '26/06/2017', a 'Print' link, and a date range filter 'Eg. 26/06/2017 to 26/06/2017' with a 'Hide filter options' link. The 'And/or show entries written' section has radio buttons for 'by anyone' (selected), 'by me', and 'not by me'. A 'Filter' button is located at the bottom right of the filter section. Below the filters, a list of notes is shown. The first note is dated '26th JUN 2017', has a lock icon, and is titled 'Note by Test Reviewee at 26/06/2017. Test'. It is marked as 'Complete' and has 'Delete' and 'Edit' buttons.

Reports

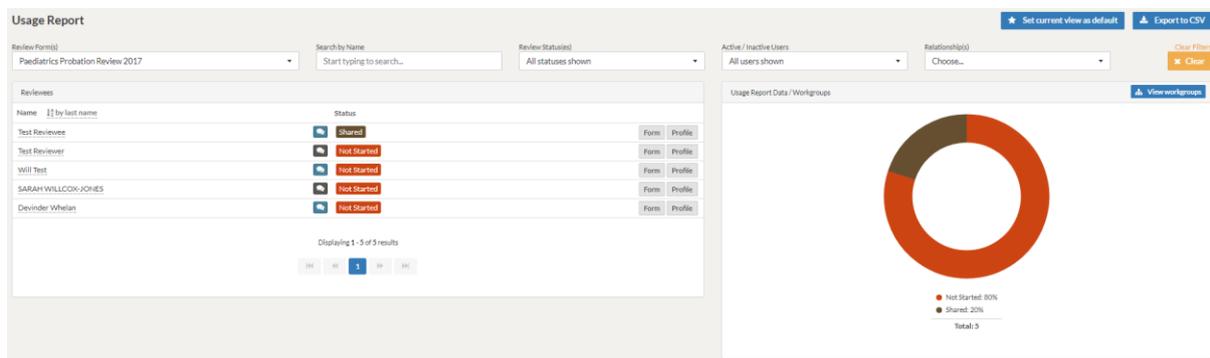
Usage Report



Reports/Usage report

This report gives a visual representation of the stage that the users' Review forms are in at that present time, giving the Reviewer an instant overview of performance and engagement. The dashboard includes the ability to drill down into further information about the individual and about their Review form.

Reviewers and Workflow commenters / Managers will have access to these reports to oversee the progress of their Reviewees' Review forms.



Usage report features and useful tips

- ❖ It is recommended to click on the 'Regenerate' button before use to ensure that the most recent data has been shown by the report in relation to users' forms.
- ❖ Ability to export results to a CSV format file.
- ❖ Ability to filter through the Usage reports by
 - Review Form
 - Employee Name
 - Review Form Status(es)
 - Active/Inactive Users

- Relationship
 - Workgroup
-
- ❖ Ability to set an Review form showing as default upon running the usage report
 - ❖ Ability to access user's forms and profiles from the usage reports
 - For example, in the image below, the Reviewer for Test Reviewee has access to click and view Test Reviewee's Review form, as well as their profile.

Usage Report

Review Form(s) Paediatrics Probation Review 2017 Search by Name Start typing to search... Review Status(es) All statuses shown

Name	Status	Form	Profile
Test Reviewee	Shared	Form	Profile
Test Reviewer	Not Started	Form	Profile
Will Test	Not Started	Form	Profile
SARAH WILLCOX-JONES	Not Started	Form	Profile
Devinder Whelan	Not Started	Form	Profile

Displaying 1 - 5 of 5 results

Navigation: <<< 1 >>>

Privacy FAQs

Q: Who can see my Review form data?

A: Only you and your Reviewer(s), once you have shared the form, can see your Review data. In addition, authorised Administrator users in your organisation will be able to access parts of the data, as well as a Simitive administrator.

Q: Who can see my history in the Review form?

A: Only you will be able to see your history in the Review form. If you have shared access text areas (text areas that can be edited by both Reviewee and Reviewer) the history can be seen by both Reviewee and Reviewer.

Q: Who can see my personal data, like email address, password, etc.?

A: Your personal data is visible to authorised Administrator users and a Simitive administrator. Specifically, your email address is visible to authorised Administrator users, Data Managers and a Simitive Administrator. If your organisation requests it, it may be displayed in the Header. Your password, once changed from the randomly generated initial password you are assigned, is not visible to anyone - even a Simitive administrator.

Review Terminology

Access

You will be unable to access a Review form if someone else is editing it.

Add

Clicking Add at the end of questions, allows you to add new lines or text areas to tables.

History

History of text areas can be viewed by clicking on **view history** in a text box.

Finalise

Clicking Finalise on an Review will end the Review process until the next Review cycle. Once agreed by both Reviewer and Reviewee, no changes can be made to the finalised Review form. Once finalised, a Review's finalisation date will be displayed in the Review header (above the Review form) and in the Review form table on the Me page.

Meeting Date

The meeting date allows you to set and agree a date for your Review meeting with your Reviewer or Reviewee.

Multiple Reviewers

Review forms allow for multiple Reviewers. Any additional Reviewers will receive the same actions as the initial Reviewer. They can also access the form and add content. All Reviewers and the Reviewee will need to agree to finalise an Review.

*Note: Multiple Reviewers can only be added by Reviewers or Administrators.

Notes

The notepad allows you to:

- Create private notes only accessible by you
- Create notes to share with your Reviewer
- Comment on individual shared notes
- Add attachments to notes
- Change private notes to shared notes
- Filter notes by date and author
- Print notes

Save and Close

Clicking Save and Close will save any changes to your Review without sharing them with your Reviewer(s) or Reviewee. This will return you to your Me page.

Share and Close

Clicking Share and Close on an Review form, will share all current changes made to the Review with the Reviewee or Reviewer(s).

*Note: If you make changes to an Review after it has been shared, these will not share with the Reviewee/Reviewer until you click share again.

Shared Fields

Shared fields allow both Reviewees and Reviewers to input text in the same text box and edit all text.