A guide to saving PDR (Performance Development Review) documentation to the HR Files (EDRM) and how to amend the document once saved.

Accessing PDR documentation via the Our Derbyshire Homepage.

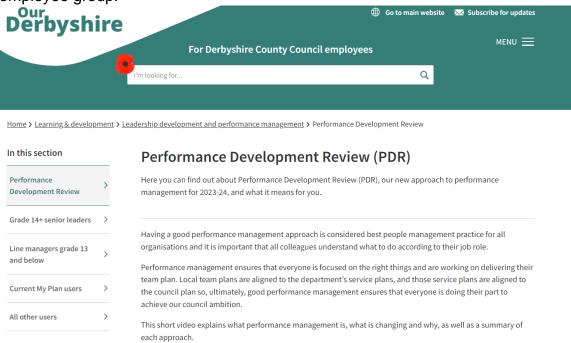
1. Using the search bar input the search term 'PDR'.

Derbyshire	Go to r	nain website 🛛 🐱 Subscrib	e for updates
	For Derbyshire County Council employees		MENU 🗮
	DR	٩	
A CONTRACTOR OF THE			

2. Select 'Performance Development Review (PDR)'.

Derbyshire ® •••	to main website 🛛 🐱 Subscribe for updates
For Derbyshire County Council employees	MENU 📃
l'm looking for	Q
Home > Search results	
Search results	Search options
21 results were found for search keyword PDR .	<u>Webpages (21)</u>
Personal development review (PDR) training for managers and individuals As part of our commitment to support everyone through the PDR cycle this year, we have created some e-learning	<u>Documents (28)</u>
training courses.	
Performance Development Review (PDR)	

3. To the left of the page under 'In this section' review and select the relevant employee group.



4. Scroll to the end of the page and review 'the Related documents' section. Select the PDR template – Word version.

## ŧ PDR Guidance for Current My Plan Users (266KB) Ŧ One-to-one meeting preparation for (136KB) ŧ Word version (46KB) One-to-one template for a ŧ template for PDR Word version (50KB) ÷. PDR Development Discussions Guidance for Control (249KB) Ŧ PDR coaching questions (86KB) PDR tips for wellbeing conversations (165KB)

## **Related documents**

5. Once the PDR template has opened – select the option to 'Download file'.

We've opened your file for quick and easy viewing right in Microsoft Edge. Choose Download file if you want to use it later.
pdr-offline-template-for-current-my-plan-users ~
🕃 Accessibility Mode 🚽 Download 🔷 Save a copy to OneDrive. 👍 Print
PDR template Current My Plan users
This template should initially be filled in by the individual and then be updated following discussions with the line manager
This template should initially be lined in by the individual and then be updated following discussions with the line manager
PERFORMANCE AND DEVELOPMENT REVIEW

6. Once downloaded the file will appear in a downloads list. In the top ribbon there is an icon of a folder and when hovered over is titled 'Open downloads folder'. Select this icon.

Downloads	₽ 9 … \$
pdr- Open file	.docx

7. Hover over the file and right click to view the menu. Select 'Rename' and continue to rename the file using this sequence: Year, month, day, (the date the start of year meeting took place), PDR (the project initials), the name of person and the financial year.



8. To access your employee HR file, select the shortcut located on your Desktop titled 'HR Files'.



- Image: Provide the service of the servic
- 9. Select the relevant department to access your personal HR file.

10. Colleagues with line management responsibility who are recognised as 'SAP Chief' will have access to their own file and the files of individuals they have line management responsibility for. Select your own name or the name of the individual whose PDR information you need to access.

? 🕇 🔺	opentext*   Content Server	Q 🖈 🗖	-
Enterprise > Human Resources > Employment >	Corporate Services and Transformation		
Ŧ	📁 Corporate Services and Transformation 🗸	::	☆
🗆 🗋 Name 🛧 Q		Size Modified	
IArchived Staff		149 Items 05/10/2023 16:12	
🗆 👼 IHR Guidance Documents		05/08/2020 14:50	
🗆 📁 A N Other		9 Items 21/10/2022 18:11	

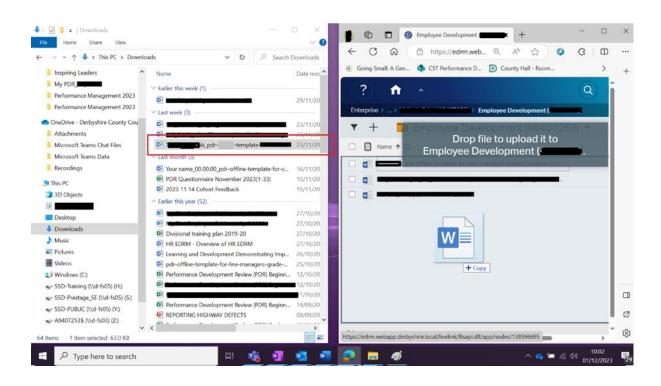
11. The 'Employee Development' file is where the completed PDR template will be saved. Select Employee Development to open the folder.

	? 1	^ 1	opentext <sup>*</sup>   Content Server	Q		
Ent	erprise > Hun	an Resources > Employn	ment > Corporate Services and Transformation >			
Ŧ						☆
	Name 4	N Q		Size	Modified	
	Show P	ermissions	Rectangular Snip		30/07/2020 12:48	
	Contrac	ts of Employment (		0 Items	30/07/2020 12:48	
	Employe	e Development (	D	3 Items	24/11/2023 13:41	$\overleftrightarrow$
	End of E	mployment (/		0 Items	30/07/2020 12:48	
	Leave (	B)		0 Items	30/07/2020 12:48	
	Perform	ance and Conduct (,		0 Items	30/07/2020 12:48	
	Variation	is ( <b>111</b> 3)		0 Items	30/07/2020 12:48	
	🚬 Wellbeir	g (		0 Items	30/07/2020 12:48	

- 12. To prepare your display, ready to drag and drop the newest and downloaded version of the PDR Word template into the folder, minimise all windows other than the 'Downloads' and 'Employee Development' folders.
- 13. Right click the taskbar at the very bottom of the display. Select 'Show windows side by side'.

- C A 🖞 https://edrm.w	ebapp.derbyshire.local/livelink/llisapi.dll/app/nodes/107616110	Q A 🟠 📀 🕄 🗘	¢ @	<b>8</b> 9
Going Small: A Gen 🦚 CST Performance I	0 🝺 County Hall - Room 🏟 HR Desk and Room 🚸 HR Desk and Room	. 🏟 Digital Adoption N 🎦 01_East_Midlands		>
? 🕇 🔺	opentext ~  Content Server	Q	* (	
nterprise > Human Resources > Employmen	t > Corporate Services and Transformation >	ee Development		
r +	📁 Employee Development (	<b>•</b> •	<b>II</b> =	☆
Name 🛧 Q		Toolbars	>	
di template-for-lin	e-managers-grade-13-below (1).docx		3 14:04	☆
d		Search	3 15:32	☆
		Show People on the taskbar Show Windows Ink Workspace button Show touch keyboard button Cascade windows Show windows stacked Show windows side by side Show the desktop Task Manager	<sup>13</sup> 13:41	
ems		✓ Lock all taskbars		
		<ul> <li>Taskbar settings</li> </ul>		9:48

## 14. Click and hold the renamed PDR template and drag and drop into the 'Employee Development' folder.



15. Maximise the 'Employee Development' screen.

Upload file			×
w to the second	-template-1		
General *Employee Deve		PSV	+
General			Only required fields (*)
Туре	Microsoft Word	Description	Add description
Size	No value		
Employee Develop	pment		
*Category	Add value		
			Upload Cancel

16. Using the right hand-side scroll bar, scroll down, and click into the 'Category' selection box and select 'PDR'.

Upload file	Filter Results	×
-	<u>Category</u>	
pdr-	1 to 1 Meetings	IPSV + Only required fields (*) • • •
General *Employee Devel	Archived My Plan Pre April 2023	IPSV +
	Induction	· ·
General	PDR	
General	Post-Employment	Only required noises ( )
Employee Develop	Pre-Employment	
Employee Develop	Supervision	I I
*Category	Add value	]
*Document	Add value	]
UD Doct Informatio	n	
		Upload Cancel

- 17. Click in the 'Document' selection box and select 'PDR Forms'. The category 'PDR Forms' is where each performance development review meeting, including the beginning, mid and year-end reviews will be captured and saved. 'Associated Correspondence' could relate to *any* associated PDR documentation e.g. emails.
- 18. Select 'Upload' on the bottom right of the window.

pdr-	-template-fait (1)	docx
eneral *Employee Develo	pment HR Post Information IPSV	+
General	Filter Results	Only required fields (*) • ×
Employee Developi	Document	
	Associated Correspondence	
*Category	PDR Forms	
*Document	Associated Correspondence	

19. An 'Uploading item' progress bar appears.

? 🕇 🔹	Uploading item • 99% ·	Q 🖈 🔳
Enterprise > Human Resources > Employm	ent > Corporate Services and Transformation > ?	
▼ +	📄 Employee Development (🚛 💷 🕬 🗸	<b>∷</b> ≡ ☆
□ D Name ↑ Q		Size Modified
_ R		<u>م</u>

20. The 'Employee Development' folder now has the PDR template, ready to capture and edit.

## How to edit a document already created

? 🔒 ^	opentext ~  Content Serve	er	Q		
Enterprise > Human Resources > Employment > Corporate Services	s and Transformation >	evelopment			
<b>•</b> +	늘 Employee Development '.	· / ¥		::	☆
□ 🗋 Name 🛧 Q			Size Mo	dified	
🗖 📑 1 <sup>10</sup> - 11			0 Items 19/	/05/2023 09:16	
202324			1 Item 19/	/05/2023 09:17	
202324			1 Item 19/	/05/2023 09:15	☆
		<b>⑥ ♂ &lt; ♂</b>	21 KB 19/	/05/2023 09:16	☆
One			24 KB 27/	/02/2023 11:22	☆
DF			7 KB 03/	/05/2023 09:25	

1. Select the pen icon by the document to be amended.

Opening your editor and returning to Content Server	
EDRM Enterprise Connect	
Eding Documert	

- 2. The document will open.
- 3. Once editing is complete, save the document.

