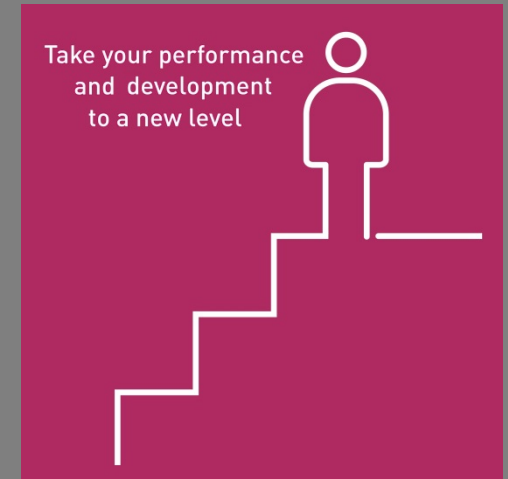


PDR Online System



Guidance for Research Staff

This is a short step-by-step guide to completing PDRs on the online system

System Login



Loughborough University Login

Enter your username and password

A service has requested you to authenticate yourself. Please enter your username and password in the form below.



Username

Login

Password

**Login to the system using
your university
username and password**

Help! I don't remember my password.

Without your username and password you cannot authenticate yourself for access to the service. Please contact the [IT Service Desk](#) for assistance.

Website maintained by: IT.Services@lboro.ac.uk

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Preparation Section – Reviewee

As a Research Associate you are only required to complete the sections relevant to your job description

Please speak with your Reviewer beforehand to confirm which sections they expect to be completed

Homepage

Ensure you are on the 'My Review' tab



My Review



My Reviewees

Click here to view your PDR online form for 2018

2017

2016

FTE

FTE
Grade

Previous job roles will appear here where applicable

Where applicable, multiple roles will appear below

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used in other processes in the future. All documentation is stored in line with University policy and data protection.

Guidance

Carefully read through the guidance notes, following the links to the PDR website for further information

Guidance

Please see the PDR guidance for further information relating to the PDR process
<http://www.lboro.ac.uk/internal/pdr/>

For help using this PDR online system, please see the guides on the PDR website for Academic Staff and for Professional Services staff.

Please note:

- The form saves automatically
- Your form will NOT be accessible to your reviewer until you click 'Share Prep With Reviewer'
- You can edit your form at any time, until the form is submitted to the Senior Review Group

Next

Work your way through each page to prepare for your PDR

Initial

- Guidance
- Personal Details

Preparation

- Review of Past Year
- Research
 - Research Outputs
 - Publication Visibility
 - Research Funding
 - Research Supervisions
- Teaching
- Enterprise
- Leadership
 - Internal
 - External

Personal Details

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Workload Model

Training and Development

Personal Details

This section is information about your role that is taken from iTrent. If any of this information is incorrect then please discuss it with your line manager, who should then contact HR to ask for updates to be made. Any changes made will take 24 hours to refresh.

Name	
School/Department	
Position	
FTE	
Grade	
Date Role Started	
Last Review Date	
Academic Teaching Qualification	
Reviewer	

**Check your personal details.
Incorrect details should be reported to
your line manager who will contact HR.**

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Review of Past Year

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Workload Model

Review of Past Year

This section gives you the opportunity to review your PDR Performance and Development objectives over the last 12 months.

Agreed Performance Objectives

Category	Supported by	Action by when	Objective	Comment
<p>Your objectives from your last PDR will appear here. Use the comment box to Review your progress against each objective; highlighting your successes and challenges.</p>				

Review of Past Year

Comment

Use this space to record your achievements, progress for this year. Include any changes to your original objectives agreed throughout the year. Remember to highlight any particular successes or challenges you faced in meeting your objectives.

Please note for this year only, if no objectives are shown above then in addition to reflecting on your performance you will need to copy and paste your Performance and Development objectives into the box below, commenting on how well you have met them.

Please Note

If you did not use the PDR online system for your PDR last year OR you if you have changed roles/contracts at the university your objectives will not automatically appear above. You will need to copy and paste any objectives set throughout the year in the comment box at the bottom of this page.

Research Outputs

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Workload Model

Research Outputs

Listed in this section are all your research outputs from 1st January 2014, as extracted from LUPIN. If your publications are missing, please amend LUPIN and wait for the data here to refresh overnight. If you have any queries about your LUPIN outputs, please contact The Research Office.

Published Outputs

Journal Article

All of your research outputs from 1st January 2014 will appear here, each with a comment box.

Missing or incorrect publication will need updating in LUPIN and will update here overnight

Comment

Research Outputs

Outputs Proposed in Last PDR

Listed in this section are research outputs proposed in your last PDR which you planned to develop over the past 12 months. These are included here to reflect on anticipated research activities between one year and the next but it is recognised that plans do change.

Publication Type

Title

Outlet

Co-Authors

Submission Date

Comment

Publication Type

Title

Outlet

Co-Authors

Submission Date

Comment

Publication Type

Title

Outlet

Co-Authors

Listed here you will see all
research outputs proposed as
recorded in you last PDR

Research Outputs

Outputs Proposed for the Next 12 Months

Please provide research outputs you anticipate submitting in the next 12 months. These are requested to provide a full picture of research activities, actual and planned, over the period of the year, but it is recognised that plans do change.

Publication Type *

Title *

Outlet

Co-Authors

Submission Date

Comment

Here you can propose research outputs for the next 12 months

Add Another

Comment

Please use this space to reflect on your research activities since the last PDR and also your future plans. Future plans might look towards a 3-5 year period but there should be clarity about plans for the coming year, expanding on any aspects of the form that you consider need explanation.

Please Note

If you did not use the PDR online system for your PDR last year OR you if you have changed roles/contracts at the university your proposed research outputs will not automatically appear above.

You will need to copy and paste any proposed research outputs into this comment box.

You may also use this space to reflect on your research activities and your future plans.

Research Publication Visibility

Initial

Guidance

Personal Details

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Review of Past Year

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— Research Outputs

— **Publication Visibility**

— Research Funding

— Research Supervisions

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Workload Model

Training and Development

Publication Visibility

Ensuring your publications are of the highest possible quality and are as visible as possible, enabling others to find, read, and build upon them, is a critical part of the scholarly endeavour. The following data has been supplied to enable you to have a conversation with your Reviewer about your publication strategy. Some guidance on the indicators provided is given below. You are also invited to supply alternative evidence of the visibility and impact of your publications, or provide comments on the indicators, in the text box below. See also the Scholarly Communications website.

Publication Visibility Indicators

Here you will find information on the PDR publication visibility indicators for 2018/19.

Some members of RT&E are provided with a list of all the outputs allocated to them in the SciVal citation benchmarking tool for the years 2014-18. Information is provided for each output to enable you to have a detailed conversation about your publication strategy.

Research Publication Visibility

Overall Comments

The SciVal data was captured on November 6th 2017.

Outputs on SciVal



Download SciVal Data

Access your SciVal Data here

Alternative Evidence and/or Comments

Publication visibility indicators such as those supplied are only one view of an output's visibility and success. There are others, such as altmetrics, IR views, IR downloads, prizes and awards. A comment box is provided to allow you to supply additional information on the visibility of your research outputs. This will be of particular relevance to staff working in the Arts and Humanities whose outputs are not best served by citation and collaboration data.

Format

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Use this box to provide additional information, such as alternative publication visibility indicators. This may include altmetrics, IR views, IR downloads, prizes and awards.

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Please Note

If your SciVal data cannot be accessed here you will need to login to SciVal to download your data. Please see the 'Instructions for finding your publication data on SciVal' document on the PDR website for more information.

Once you have downloaded your data you can input the relevant information into the comment box at the bottom of this page.

Research Funding

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Workload Model

Training and Development

Research Funding

Listed in this section will be all current research grants held in an Agresso J code for which you are acknowledged as PI or Co-I. Please note that the award values do not include any third party income. Details of consultancy activity is included in the subsequent Enterprise section.

Current Funding Held

Budget Code	Total Value
Funder	Funding Type
Start Date	End Date
Principal Investigator	
Co-Investigators	
Budget Code	Total Value
Funder	Funding Type
Start Date	End Date
Principal Investigator	

Research grants held in an Agresso J code, where you are acknowledged as PI or co-I, will pull through here

Research Funding

Applications for Funding

This section will include any submitted research funding applications which have been approved by your School through the Agresso Costing Tool since 1st August 2015, including any which have been unsuccessful.

Pre-Award Reference	Application Date
Funder	Type of application
Loughborough Total	Total Value
Anticipated Start Date	Anticipated End Date
Lead Principal Investigator	
Co-Investigators	

Here you will see all submitted research funding applications (including unsuccessful applications) which have been approved by your school through the Agresso Costing Tool since 1st August 2015

Research Funding

Funding Plans Proposed in Last PDR

This section displays the funding plans you submitted in your last PDR.

Proposed Title
Funding Body
Total Value (£)
Value to Department (£)
Role
Co-Applicants
Percent of Time
Submission Date
Comment

**Listed here you will see all funding plans recorded
in your last PDR**

Please note

**If you did not use the PDR online system for your PDR last
year OR you if you have changed roles/contracts at the
university your proposed funding plans will not
automatically appear above.**

**You will need to copy and paste any proposed funding
plans into the comment box at the bottom of this page.**

Research Funding

Applications for Funding Intended for the Next 12 Months

Please provide details of research funding you anticipate submitting in the next 12 months. These are requested to provide a full picture of research activities, actual and planned, over the period of the year, but it is recognised that plans do change.

Proposed Title *

Funding Body *

Total Value (£)

Value to Department (£)

Role

Co-Applicants

Percent of Time

Submission Date

Comment

Here you can add the applications for funding you plan on submitting over the next 12 months

Add Another

Comments

Please use this space to comment on your funding plans from last year. You may also wish to include details of any other funding or support for your activities not listed above.

Use this box to reflect on your funding plans from last year, and detail anything missing from above

Research Supervisions

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Workload Model

Training and Development

Research Supervisions

Research Student Supervision

Listed here are MPhil or PhD students for whom you are indicated as a supervisor and who have an active status in LUSI, and in addition any that have completed their studies in the last 12 months.

Student ID

Name

Co-supervisors

Start Date

Thesis Submission Date

Comment

Your MPhil and/or PhD students who have an active status in LUSI or have completed their studies in the last 12 months will be listed here

Student ID

Name

Co-supervisors

Start Date

Thesis Submission Date

Comment

You have the opportunity to comment on each supervision

Research Supervisions

Student ID

Name

Co-supervisors

Start Date

Thesis Submission Date

Comment

Research Associate Staff Managed

Where applicable, research staff you manage will appear here. If any are incorrect you will need to contact HR

Any Additional Comments

Please use this space if you wish to make any further comments on your supervisions.

Use this space to reflect or make on further comments on your supervisions over the last 12 months

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Workload Model

Training and Development

Overall Comments

Teaching

Workload model data are provided which detail your key teaching commitments in the last year. Please note anything which is not currently captured by the workload data below.

Feel free to add details of any teaching activity which doesn't appear on your workload in the School data provided. This might include time commitments for lectures/tutorials/labs which are not assigned to you in the workload model. This will allow our records to be updated and consideration of such activity to be taken into account.

Input any teaching activity not included in your workload model

Add Another

Please highlight any significant changes to your teaching activity this year

For example, new lecture courses, new/changed responsibilities, different circumstances (e.g. changes in the number of students or modes of delivery) etc.

Format

B *I*

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Highlight and reflect on any changes to teaching activity here

Teaching - continued

Good Practice in Learning and Teaching

Please reflect on how you have ensured good practice in learning and teaching in each of the following three areas, including evidence of good practice where appropriate. You are encouraged to refer to the University's Framework for Good Practice in Teaching and Learning and the UK Professional Standards Framework.

Format ▼ **B** *I* ☰ ☷ ↻

Use the four boxes below this to comment on how you have ensured good practice in:

- Learning and teaching
- Curriculum design, delivery, development and education
- Student engagement, support and development
- Professional learning and career development

The links above should be used to refer to the University's Framework for Good Practice in Teaching and Learning, and the UK Professional Standards Framework

Curriculum Design, Delivery, Development and Evaluation

Format ▼ **B** *I* ☰ ☷ ↻

Teaching - continued

Are there any particular examples of innovation and/or successful best practice which you would like to highlight?

Include in this section any awards for teaching related activities, or any teaching and learning grants you are involved in (applications made and ongoing activity).

Format ▼ **B** *I* ☰ ☷ ↻

Use this space for details of any awards for teaching related activities, or teaching and learning grants you are involved in

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Enterprise - Partnerships

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Overall Comments

Enterprise

Partnerships

List external partners and the nature of the activity with them. Partnerships can include commercial and non-commercial organisations - but only include formal connections here. Include any collaboration that benefits your enterprise, research and/or teaching activities, and explain how you have liaised with the organisation(s). If you are planning to develop any new partnerships over the coming year, please also mention this in brief (you may wish to say with whom, why, what you hope to achieve, and indicate what support if any you may need from your School and/or the Enterprise Office to make the partnership a success).

Use this space to:

- List external partners
- Include any collaboration that benefits your enterprise, research and/or teaching activities, explaining how you have liaised with the organisation
- Briefly describe any partnerships you are planning to develop over the coming year

Enterprise - Impact

External

Workload Model

Training and Development

Overall Comments

Impact

Summarise any impact achieved since 1 August 2013, any impact-related activities over the past year and your plans for pathways to impact from your research. Impact can arise at any point during the research process, so you can include impact that has emerged from projects completed in previous years. Include any examples of income, sponsorship, recognition, awards, patents, licenses, or other distinct outcomes that have arisen. Importantly, include any measurable evidence that change has taken place in response to your research - this may be economic, environmental, social or technological change. Describe the nature of that change (impact), who has benefited, and to what extent. Refer to your Associate Dean (Enterprise) for advice, or access this site for useful resources on impact: <http://www.fasttrackimpact.com>

Title *

Description *

Format ▼ **B** *I* ☰ ☷ ↻

Adding one at a time, input details of:

- **Any impact achieved since 1st August 2013**
- **Impact-related activities over the past year**
- **Your plans for pathways to impact from your research**

Add Another

Enterprise – Funding

Enterprise Funding

This listing includes all funding received via Enterprise Projects Groups and other mechanisms within the Enterprise Office.

Proje...	Activity	Company	Project	Grant	£
Listed here you will see all funding received via Enterprise Projects Groups and other mechanisms within the Enterprise Office.					

Enterprise – Self Reflection

Enterprise Self Reflection

Please use this space to reflect on your enterprise activities since the last PDR and also your plans for the coming year, expanding on any aspects of the form that you consider need explanation.

Please also add details of enterprise funding intended for the next 12 months.

Format ▼ **B** *I* ☰ ☷ ↻

Use this space to reflect on your enterprise activities since your last PDR, and add details of enterprise funding intended for the next 12 months

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Leadership - Internal

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Workload Model

Training and Development

Overall Comments

Leadership, Management and/or Collegiality

Use this section to reflect on your substantive leadership, management and collegiality roles and activities across your School and the University. Some roles may be clearly identified in your School workload model, others may not. You may be more familiar with a management role being known as an administrative role in your school.

For Reputation and Influence (Esteem) and substantive roles held externally, please see the external leadership section.

Substantive roles not referenced through the Workload Model (WLM)

Add roles one by one

Add Another

Self Reflection

This is a summary of your reflections on your leadership, management and/or collegiality within the School, or more broadly across the University. Your reflections may include things that you have learnt or developed in this area in the last 12 months or things that you feel would help you develop further. For this section it may be useful for you to complete the online Loughborough Leadership Framework, which is a self-assessment development tool aimed at helping you reflect on this area of your leadership attributes.

Format

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Reflect on your leadership, management and/or collegiality within the school and the university

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Leadership - External

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Workload Model

Training and Development

Overall Comments

External

In this section you are given the opportunity to reflect on any leadership or other substantive roles you hold which are external to the University.

Substantive or Leadership Roles Held Externally

Add external roles one by one

Add Another

Reputation and Influence (Esteem)

Please use this section to record other activities, invitations or awards that highlight your current reputation and influence outside the University, indicating whether they are at national or international level. This does not need to be limited to new indicators from the past year.

Format

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Use this space to record:

- Other activities
- Invitations
- Awards

That highlight your current reputation and influence outside the University

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Workload Model

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Workload Model




Training and Development

Overall Comments

Workload Model

A summary of your Workload should be provided by your own School offline from this system, and is therefore a reflection of your workload as recognised by your own Senior Management Team (SMT).

Summary

Format **B** *I*   

Use this space to summarise your workload model

Comment

The workload summary presents the balance of the activities that comprise your total workload for the year. You should reflect on the activities that comprise your workload and may comment on the balance between these activities and/or the total workload for the year. You may also wish to comment on significant activities that affect the overall shape of your workload, such as fellowships, significant administration loads or exceptional activities that have or may impact your workload.

Use this space to reflect on the activities that comprise your workload and comments on the balance between these activities and/or the total workload for the year

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Workload Model

Training and Development

Overall Comments

Training and Development

This section lists all of the training and development undertaken as recorded in my.HR.

Date	Title	Topic

Your learning record from my.HR will be listed here in date order

Training and Development

Additional Learning and Development

If you have undertaken any development activities not listed above then please include these in the space below. You can also add additional training into my.HR to ensure your personal learning record is accurate. This will update every 24 hours.

Format ▼ B I ☰ ☷ ↻

This box can be used for any development which is not listed above

Proposed Development Activities

Please use this space to suggest any development activities which you think will be relevant to your role over the coming 12 months.

Format ▼ B I ☰ ☷ ↻

This box can be used to suggest any development activities you might undertake over the next 12 months.

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Overall Comments

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Overall Comments

This is an opportunity to add any additional information that you feel is relevant to your performance and/or development. This information may be useful in reviewing your past objectives or thinking about your future objectives.

Comment

Comment

Format



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


Use this space to provide your Reviewer with any additional details regarding your performance and development over the last 12 months

Overall Comments (Continued)

Proposed Objectives

Please use this space to suggest what objectives you might try to achieve next year. Future objectives will need to be agreed with your reviewer in both performance and development so it is helpful to give this consideration prior to your PDR.

Proposed Objectives

Format ▼	B	<i>I</i>			
Use this space to suggest potential performance and development objectives for the next 12 months					

Overall Comments (Continued)

Line Manager Feedback

If you have any feedback for your line manager please enter it below.

Format ▼ B I ☰ ☷ ↻

This space can be used to provide feedback for your line manager

When you are satisfied you have completed your preparation work, click this button to share with your Reviewer. This will trigger an email to notify them.

Share Prep With Reviewer

Meeting Record Section - Reviewer

Reviewers only



My Review



My Reviewees

Name	Job Title	Progress	Rating	Meeting Date	Last Updated	Rating Agreed	Actions
		Shared Meeting with Reviewee	(show)	-	8 th Dec 2017 at 09:58	-	Open 2017 Review

This shows once the Reviewee has submitted their preparation

Select 'open 2017 review' from the drop down to view the Reviewee's preparation

Please note whilst the PDR conversation is confidential the documentation may be shared in the future. All documentation is stored in line with University policy.

Setting Objectives

Reviewers only

Guidance

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Reviewer's Comments

Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

Agreed Performance Objectives

Details of the objective are recorded here

Category

Objective Title

Action by when

Comment **B** *I*

Use this space to input a description of the agreed objective. This may include and resources needed and how performance will be measured.

Use this button to add more objectives

Add Another

Reviewer's Comments

Reviewers only

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Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

Discussion Summary

Format

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Use this space to summarise the PDR meeting, including the rationale behind the recommended performance assessment rating.

PDR Meeting Date

Please enter the date on which the PDR discussion took place.



Use the calendar to input the date of the meeting

Reviewer's Comments

Reviewers only

Select
recommended rating
from drop
down menu

Recommended Performance Rating

Excellent
Very Good
Good
Requires Improvement
N/A - started position since 1st October

Back

Share Meeting Record with Reviewee

Check through the objectives, discussion summary and recommended performance rating then click this button to share with your reviewee. This will trigger an email to notify them.

Supporting Statement

Reviewers only

Recommended Performance Rating

saved at 16:50

Recommended Performance Rating

Excellent

Supporting Statement

Use this space to identify the evidence from the PDR discussion that demonstrates how, over the previous 12 months, the Reviewee has met the criteria for excellence. (100 words maximum)

Recommended Performance Rating Justification

Format

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Use this space to justify your recommended rating of 'excellent' to the Senior Reviewer Group (within 100 words)

Click this button to share with your reviewee. This will trigger an email to notify them.

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Share Meeting Record with Reviewee

PDR Agreement - Reviewee

Reviewer's Comments

Reviewees only

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Meeting Record

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PDR Agreement

Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

Agreed Performance Objectives

Category

Title

Action by when

Comment

Thoroughly read through the agreed performance and development objectives inputted by your Reviewer.

If you feel any need amending you will need to discuss this with your Reviewer. They will need to login to make the changes.

Agreed Development Objectives

Category

[Nothing entered]

Title

[Nothing entered]

Reviewer's Comments

Reviewees only

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Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

[Nothing entered]

PDR Meeting Date

Please enter the date on which the PDR discussion took place.

05/01/2018



Recommended Performance Rating

Your recommended rating will appear here

Check that your Reviewer's discussion summary and PDR meeting date are correct

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PDR Agreement

Reviewees only

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PDR Agreement

PDR Agreement

Please complete this section before submitting the PDR form to be reviewed by the Senior Review Group. You are able to continue to edit the form at any point until you click "Submit".

Reviewee

Please use the space provided to make any comments you have regarding your recommended performance rating.

Format



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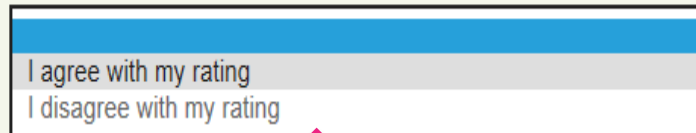
This space can be used if you wish to make any comments in terms of your recommended performance assessment rating

PDR Agreement

Reviewees only

I agree with the recommended rating

If you agree with your rating please select "agree" from the dropdown box below. If you do not agree please use the comments box to state the reasons why you are in disagreement with your recommended rating and select "disagree" from the dropdown.



I agree with my rating
I disagree with my rating

Back

Submit PDR (reviewee)

Use the
drop
down to
select
'agree' or
'disagree'

Please Note!
Once submitted to the Senior
Reviewer Group no further
amendments can be made.

Click
here to
submit
to the
Senior
Reviewer
Group

PDR Agreement

Reviewers only

After the reviewee has submitted their PDR again you must submit it to the Senior Review Group. You will be offered the opportunity to add any further comments.

Reviewee Name

Reviewee Position

Reviewee Submitted

Actions ▾

Actions ▾

Actions ▾

Actions ▾

Actions ▾

Reviewees at this stage will appear with this in the progress column.

Click here to open up the review.

PDR Agreement

Reviewers only

Setting Objectives

Reviewer's Comments

PDR Agreement

I agree with the recommended rating

If you agree with your rating please select "agree" from the dropdown box below. If you do not agree please use the comments box to state the reasons why you are in disagreement with your recommended rating and select "disagree" from the dropdown.

Reviewer

Please add any final comments that you feel would be helpful in summarising the discussion that took place during the PDR meeting, or the reasons for the performance rating given.

Format

B *I* U

(inherited size)

☰ ☲ ☱ ☳ ☴ ☵ ☶ ☷

You are given the opportunity to add any further comments in this box.

Whether the reviewee has agreed or disagreed will appear here

Click here to submit to the Senior Reviewer Group

Back

Submit PDR (reviewer)

Help when using the system

PDR Help

I'm having a problem with...

- choose an option --
- my Outputs data
- my SciVal data
- my Research Staff managed
- my funding held
- my funding applications
- my Enterprise funding
- my my.HR learning record
- a technical issue with the Review

This list of options will appear.

Select the relevant one, and type in your query.

This will be sent to the relevant department via email.



Click here for help

Close

Send

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