

Direct Report Quick Start Guide

Unified Talent Perform

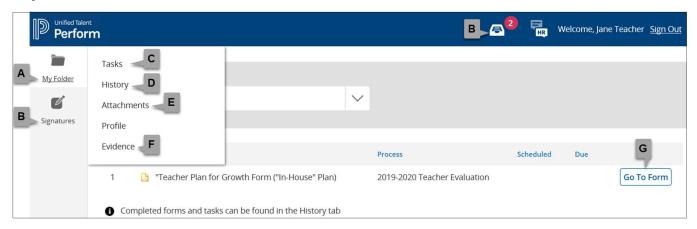
Updated: July 15, 2019 This edition applies to Release 19.6.0.0 of the Unified Talent Perform software and to all subsequent releases and modifications until otherwise indicated in new editions or updates. The data and names used to illustrate screen images may include names of individuals, companies, brands, and products. All the data and names are fictitious; any similarities to actual names are entirely coincidental. PowerSchool is a trademark, in the U.S. and/or other countries, of PowerSchool Group LLC or its affiliate(s). Copyright © 2005-2019 PowerSchool Group LLC and/or its affiliate(s). All rights reserved. All trademarks are either owned or licensed by PowerSchool Group LLC and/or its affiliates.

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Direct Report

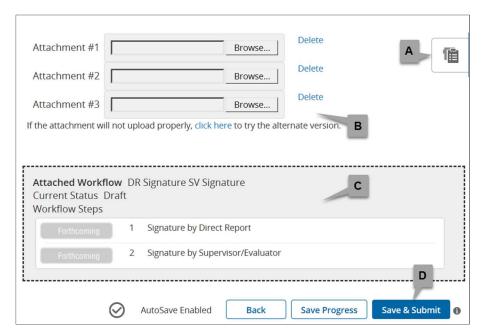
My Folder



- A. **My Folder**: View your tasks and evidence here.
- B. **Signatures**: Electronically review, sign, or approve forms.
- C. **Tasks**: Review the tasks assigned to you that need to be completed.
- D. **History**: Review your completed tasks and forms.
- E. Attachments: View documents shared by supervisors.
- F. **Evidence**: Access the list of artifacts that you have attached to your forms, as well as notes shared with you by supervisors.
- G. **Go To Form**: Click to open and complete the form.

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Forms



- A. **Rubric/Form Review Tool**: Access a slide-out tool to view any rubric associated with this process, as well as any completed forms in the process.
- B. Attachments: Add up to three separate attachments.
- C. **Workflow**: View the signature, approval, or review steps that must be completed once the form is submitted.
- D. Save & Submit: Save the form, lock it from further edits, and begin the workflow defined for the form.

Signatures and Approvals

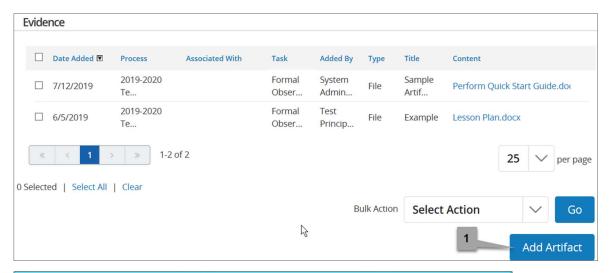


- A. **Signatures**: Review and electronically sign or approve forms.
- B. **View and Sign**: This button name changes depending on whether you are signing, approving, or reviewing a form. Click to view the completed form, then scroll to the bottom to complete the assigned step.

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Evidence

Add an Artifact





- 1. Click Add Artifact.
- 2. Enter the Title.
- 3. Select File Upload or URL.
- 4. If enabled by HR, associate the artifact with rubric items. Note that the rubric selected for the process is the rubric to which artifacts can be associated.
- 5. Click Save Artifact.

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