



# Direct Report Quick Start Guide

## Unified Talent Perform

# Direct Report

## My Folder

The screenshot shows the 'Unified Talent Perform' interface. The top navigation bar includes the logo, a notification icon with a red '2', and the user's name 'Jane Teacher' with a 'Sign Out' link. On the left, a navigation menu is open, showing options: 'My Folder' (A), 'Signatures' (B), 'Tasks' (C), 'History' (D), 'Attachments' (E), 'Profile', and 'Evidence' (F). The main content area displays a table of tasks with columns for 'Process', 'Scheduled', and 'Due'. A single task is listed: '1' with a document icon, titled '"Teacher Plan for Growth Form ("In-House" Plan)', with a due date of '2019-2020 Teacher Evaluation'. A 'Go To Form' button (G) is located at the end of the row. A footer note states: 'Completed forms and tasks can be found in the History tab'.

**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.

# Forms

Artifacts

Date Added Added By Associated With Type Title Content Actions

No data available in table

Showing 0 to 0 of 0 entries

Attached Workflow Standard Workflow

Current Status Draft

Workflow Steps

Forthcoming	1	Signature by Direct Report: Dill Harris
Forthcoming	2	Signature by Supervisor/Evaluator

AutoSave Enabled

Back Save Progress Save & Submit

**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. Artifacts:** Add any number of artifacts/attachments up to 10mb in size. May not be present on all forms. See next page for more details on adding artifacts.

**C. Workflow:** View the signature, approval, or review steps that must be completed once the form is submitted. May not be present on all forms.

**D. Save Progress:** While the form does auto-save, it is always a good idea to Save Progress prior to exiting the form to be sure your changes are saved.

**E. Save & Submit:** Save the form, lock it from further edits, and begin the workflow defined for the form. Click this only when you have completed all of your edits.

# Evidence

## Add an Artifact

The screenshot shows the 'Add Artifact' form. At the top is a header 'Add Artifact'. Below it is a 'Title' field with a 'required' label and a callout '2'. There are two radio button options: 'File Upload' and 'URL'. The 'File Upload' option has a list of valid extensions and a 'Choose File' button with callout '3'. The 'URL' option has a text input field. At the bottom, there is a checkbox 'Associate the artifact with one or more rubric items.' with callout '4'. At the very bottom are 'Save Artifact' and 'Cancel' buttons, with callout '5' pointing to the 'Save Artifact' button.

1. Click Add Artifact at the bottom of the form.
2. Enter the Title.
3. Select File to 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.

## Signatures and Approvals

The screenshot shows the 'Approvals' section. On the left is a sidebar with 'My Folder' and 'Signatures' (callout 'A'). The main area is titled 'Documents Awaiting Your Signature'. Below the title is a table with columns: Document, Direct Report, Process, Action Required, and a 'View and Sign' button (callout 'B').

Document	Direct Report	Process	Action Required	
Classroom Observation Summary Sheet	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	<a href="#">View and Sign</a>
Teacher: Section A: Standard 1: Missouri Teaching Standards	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	<a href="#">View and Sign</a>

**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.